County Wexford

Tourism Strategy

Comhairle Contae Loch Garman
Wexford County Council

2019 - 2023

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Foreword

**Tom Enright
Chief Executive
Wexford County
Council**

Wexford County Council recognises the importance of tourism to Wexford's social and economic prosperity. Tourism helps support employment, social and economic development throughout the county, in urban centres, small towns and rural regions.

Wexford is the Cornerstone of Irelands Ancient East and is steeped in History, has beautiful beaches and is blessed with breath taking scenery, has great product and a committed tourism industry. Wexford County Council plays a key role in the provision of tourism services in the County, through funding of Visit Wexford and through the provision of tourism infrastructure at key locations and through enterprise supports provided by the Local Enterprise Office.

The Inclusion of Wexford in Fáilte Ireland's "Irelands Ancient East" is of huge importance in providing greater opportunities for overseas visitors to discover this beautiful county. I believe that The County Wexford Tourism Strategy 2019 to 2023 offers great scope for improving visitor numbers and dwell time by working with and collaborating with our various partners and service providers. I also believe it is important to work with our neighbouring counties in a co-ordinated and a collaborative way.

The County Wexford Tourism Strategy 2019 to 2023 takes account of national, regional and local strategies, including People, Place and Policy-Growing Tourism to 2025, Fáilte Ireland Irelands Ancient East, the South East Region Action Plan for Jobs and the County Wexford Local Economic and Community Plan 2016 to 2021.

I wish to acknowledge the input and guidance of the Economic Development and Enterprise Strategic Policy Committee under the Chairmanship of Cllr Michael Sheehan and the guidance and engagement from Fáilte Ireland.

I look forward to the implementation of the Strategy and I am confident that this strategy will help to develop and grow tourism in County Wexford over the coming years.

Councillor Michael Sheehan Cathaoirleach Wexford County Council

As Cathaoirleach of Wexford County Council, I welcome the development of the County Wexford Tourism Strategy 2019 to 2023.

The adoption of this Tourism Strategy means that there is an agreed road map in place to achieve the vision set for County Wexford.

"To become one of Ireland's most compelling tourism destinations and in doing so improve the quality of life of people and communities throughout the county."

To achieve this vision, the strategy sets out a number of strategic priorities each with key actions and initiatives.

Growing the county's visitor economy will deliver significant economic benefits as well as sustaining the social, cultural and environmental values for local communities. Tourism presents an opportunity to boost economic activity within the county, to support existing employment and businesses while also creating new enterprises and jobs. Collaboration has been at the heart of the development of this strategy which was informed by the tourism sector, community sector, the State Sectoral Bodies, Government Departments, Wexford County Council and the Visit Wexford Forum and individuals who recognise County Wexfords tourism potential.

In particular Visit Wexford working closely with Wexford County Council provides the ideal structure to deliver on this strategy.

I would like to thank everyone involved for their input and commitment to this strategy and encourage the fostering of further collaboration and partnership to ensure that the strategy is implemented effectively and sustainably across the whole county which will deliver a stronger tourism sector and ensure job creation and greater prosperity for the citizens of our beautiful county in the Sunny South East.

1. Introduction

1.1 Executive Summary

Tourism is one of the largest and fastest-growing sectors in the world. It is Ireland's largest indigenous industry, its importance to Wexford's social and economic prosperity cannot be understated. It is estimated that tourism creates over €207 million in revenue for the county on an annual basis and currently supports nearly 6,000 jobs. Furthermore, it supports employment, social and economic development throughout the county, in urban centres, small towns and rural regions.

Whilst recent revenue growth has been positive for Wexford, with 20 percent growth from 2013 to 2017, this growth has lagged behind the national growth rate of 43 percent. The county enjoys a very strong performance with the domestic visitor base, however lags behind neighbouring counties in terms of overseas visitors (where it is anticipated the majority of future growth will come from). Furthermore, Wexford over indexes on revenue from GB visitors relative to the national average (55 percent of overseas revenue coming from GB visitors versus a national average of 28 percent). Given the impending Brexit this presents a significant threat for tourism within the county.

Set against this background, and in consultation with key government agencies, industry stakeholders and communities, Wexford County Council has developed a detailed and ambitious tourism strategy for the county for the period 2019 to 2023.

The strategy has been designed so that it provides direction and focus for the county as a whole, it is underpinned by a shared ambition that is:

**To become one of Ireland's most compelling tourism destinations and in doing so improve the quality of life of people and communities throughout the county.
In doing so it is envisaged that the strategy will directly:**

- create new employment opportunities throughout the county
- create year-round sustainable tourism businesses - driving 'season extension'
- diversify sources of income to Wexford's local economy
- create and improve local infrastructure, facilities and amenities and
- bring people and communities together

In terms of overall measurable targets, the strategy is seeking to **increase tourism revenue by 18.7 percent and visitor numbers by 12 percent**, in doing so **creating approximately 800 new jobs** in the county. Core to the achievement of these targets will be Wexford's capacity to expand its international visitor base, develop greater collaboration at agency, industry and community levels, position Wexford as a 'must see' element of Ireland's Ancient East, whilst also broadening the seasonal and regional relevance and appeal of Wexford as a holiday destination.

The strategy has defined five key areas of focus and development. These are the core foundations upon which future growth will be founded. These key areas, their respective strategic goals and key strategic imperatives are detailed as follows:

AREA OF FOCUS AND STRATEGIC GOAL	KEY STRATEGIES
A **TARGET MARKETS AND SEGMENTS** **GOAL:** To diversify the visitor base by growing the volume of US, French and German visitors whilst consolidating the share of domestic visitors and volume of GB visitors	• Consolidate a grow domestic market with a primary focus on the family segment and older couples • Growth North American, French and German markets, consolidate GB - with a primary focus on the Culturally Curious and Great Escapers segments
B **VISITOR EXPERIENCE DEVELOPMENT** **GOAL:** To strengthen, develop and elevate Wexford's range of compelling, unique and must do visitor experiences, creating real standout and competitive differentiation	• Establish the most compelling clustered experience of Ireland's Ancient East • Develop Wexford Town's profile as a unique and vibrant maritime town with rich Viking heritage • Establish Wexford's contemporary coastal experience • Culture and heritage experience development • Create a new and unique and original iconic experience
C **CAPACITY BUILDING** **GOAL:** To strengthen the capacity of industry to create and promote experiences that will attract priority segments from key markets	• Support and enhance capabilities within community, business and public partners to collectively scope tailored plans and deliver compelling visitor experiences
D **PARTNERSHIP DEVELOPMENT** **GOAL:** To increase stakeholder and industry collaboration so that enterprises and experiences are developed around a shared vision and ambition	• To establish and maintain a leadership, governance and implementation structure that will see the strategy and its targets delivered • To foster a countywide sense of shared ambition and commitment to the delivery of the strategy for growth

AREA OF FOCUS AND STRATEGIC GOAL	KEY STRATEGIES
E **BRAND & MARKETING COMMUNICATIONS** **GOAL:** To invest in building understanding, capacity and execution capabilities in marketing and communications to support awareness creation, trial and conversion of target consumers.	• Establish a clear and coherent brand architecture • Ensure key stakeholders are focused on the key target segments • Deliver a clear Wexford message framed within the context of the Ireland's Ancient East brand • Optimise the digital footprint of the Wexford brand • To increase the degree to which Wexford's offering is showcased and included in the programming to tour operators

Wexford is a county with a great tourism tradition, with a depth and breadth of tourism assets that have huge potential. However, now is the time to rejuvenate Wexford as a tourism destination both in a domestic and international context.

With a clear visitor focus, the development of compelling, unique and connected experiences, outstanding marketing and a collaborative and cohesive tourism stakeholder network we can deliver the growth, revenue and employment envisioned within the strategy. This will make Wexford *one of Ireland's most compelling tourism destinations and in doing so improve the quality of life of people and communities throughout the county.*

1.2 Development of the Strategy

Set against a growing but rapidly changing consumer and tourism landscape, and appreciating the importance of tourism to Wexford's local economy, Wexford County Council, in partnership with key stakeholders, commissioned the development of a tourism strategy to drive growth over the period 2019 to 2023.

The core aims for the strategy are as follows:

1. Increase visitor numbers and revenue in a sustainable manner

2. Provide recommendations to guide and stimulate investment and development in order to increase visitor numbers, drive economic growth and create sustainable employment

3. Identify key product and experience priorities that will enable growth

4. Pinpoint specific markets and segments that Wexford will target to drive growth.

The strategy that has been developed takes full account of the Wexford County Council Economic and Community Investment Programme 2018 - 2022 and the Tourism Statement of Strategy and Work Programme (Wexford County Council 2017 - 2022).

1.2 Strategy Development Process

The process of strategy development was underpinned by four key elements:
1. An extensive review of existing data, trends and market intelligence
2. An analysis of the current market and segmentation strategies (as defined by Fáilte Ireland and Tourism Ireland)
3. Desk research to benchmark Wexford's tourism offering versus peers and key competitors
4. Consultation with a range of trade, industry and agency actors within Wexford and Ireland's broader tourism system.

Whilst the strategy has been designed for the period 2019-2023 it will be important that it is reviewed and, as necessary, adjusted over the following four years. In order to facilitate this there will be a review of the strategy and its implementation in 2021 (at the mid-point in the life of the strategy). This review process will be led by Wexford County Council and supported by key stakeholders in the county.

A summary of the strategy development process, which encompassed four key stages, analysis, consultation, strategy development and implementation planning is illustrated below.

1.2 Strategy Development Process

Analysis

Meta-analysis and review of documentation supplemented by desk research

Market and segmentation analysis

Benchmark and competitive review

Strategy Development

Product and Experience Development

Implementation Planning

Consultation

19 one to one interviews with key actors

Scaled World Café sectoral engagement with trade, industry, community and agencies

Public representatives workshop

Trade and Industry workshop

These key elements were brought together to shape a focused and actionable strategy that provides the county and key stakeholders with the basis to make informed decisions and investments that will support sustainable growth.

It is always important to note that the process sought be inclusive, enabling the active participation of key stakeholders at a county and national level. A full list of stakeholders consulted is available in Appendix 1.

1.3 Sustainability and Sustainable Tourism

Whilst the strategy is focused on the growth of tourism in Wexford it is mindful that this growth must not come at the cost of the environment and sustainability. Thus, environmental impact and sustainability have been key considerations in the development of the strategy.

When explaining why they chose to visit Ireland, international tourists consistently point to the beautiful scenery, natural attractions, history and culture and the warmth of the people. These elements are irrecoverable natural assets. It is therefore essential that all of those who influence the evolution of the tourism experience in Wexford ensure that it evolves sustainably.

On an international basis 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."

This definition highlights the interdependency of key elements of sustainability: social, environmental and economic.

Sustainable tourism should support the economic, social and cultural well-being of communities; help the protection of the natural and cultural environment; allow the use of natural and cultural assets for economic betterment whilst at the same time guaranteeing that these resources are not deteriorated or destroyed.[1]

The protection of natural ecosystems and heritage sites has in many cases been enabled by the financial benefits of tourism. Similarly, the heightened awareness of our natural assets increases public and political support to conserve these assets. Therefore, and as set out in this strategy, the development and protection of natural and cultural heritage sites has the function of preserving them for future generations.

Recognition and support must be given to the emphasis placed by the Department of Tourism Transport and Sport[2] on sustainable tourism in the context of the protection of our heritage assets when detailing strategy and plans.

The preservation of our natural environment, enablement of the positive economic impacts of tourism and support of the social and cultural well-being of communities are central tenets of what Wexford County Council is seeking to achieve. If any of these elements fail to be maintained our strategy cannot be successful. We are therefore wholly committed to sustainable development in the context of our plans to grow tourism in the region.

[1] *Sustainable Tourism Development in UNESCO Designated Sites in South-Eastern Europe.*
[2] *People, Place and Policy; Growing Tourism to 2025*

1.4 Accessible Tourism

Accessible tourism is vital to ensure that all potential visitors regardless of their age, size, disability or abilities can travel to the tourism destinations and easily enjoy products and services in the same way as everyone else.

However, the impact of accessible tourism goes beyond the tourist beneficiaries to the wider community, engraining accessibility into the social and economic fabric of society.

The provision of accessible tourism products and services creates opportunities for new markets within the tourism sector.

Making tourism services and facilities accessible for all boosts the potential to increase visitor numbers and thus increase revenues for tourism providers and the wider community.
Set against this background and in the context of accessibility the core aims of the strategy are defined as follows:

1. To support the collaboration process among stakeholders to ensure accessible tourism is promoted enabling growth in a sustainable manner
2. To support effective partnerships and cooperation across many sectors at the national, regional and international levels to promote accessible tourism initiatives.

As Wexford looks towards the development of its tourism offering and experience it does so with a focus on inclusivity and ensuring the highest levels of accessibility within the county.

2. Context

2. Context

Tourism is increasing on a globally and is one of the largest and fastest growing sectors in the world economy[3]. A growing middle class, particularly in emerging countries, is a particular driver of demand in the sector. This trend is forecast to grow in the coming years with Ireland seeing a particular benefit as a consequence of rising demand and increased direct access to the country.

Globally tourism has seen consistent growth for over six decades driven by cheaper airfares, ease of booking and technological advances.

In this chapter we will explore the context in which Wexford tourism is operating and how national policies and global consumer trends influence and impact the county's strategy.

2.1 International and Global Tourism

"Tourism plays a key role in global economic activity, job creation, export revenue and domestic value added, and directly contributes on average in the OECD area 4.1% of GDP, 5.9% of employment, and 21.3% of service exports.[4]"

Global tourism continues to experience growth and is one of the world's fastest growing economic sectors with international tourist arrivals growing for eight consecutive years. International tourist arrivals grew by 6% in the first quarter of 2018 to reach a total of 1.4 billion travellers. Europe, which is the world's largest tourism region, saw a growth in visits of 7% in the same quarter[5]. Emerging and advanced economies fuelled this growth, led by the United States.

Strong momentum is expected to continue into 2019 and beyond, as international travel becomes more economically viable for more consumers. Forecasters point to growing numbers of international travellers, driven by continued economic growth and consumer prosperity, including a fast-expanding new middle class (who will have greater access to goods and services around the world) in many emerging and developing economies, growth in international air services and liberalisation of travel regulations.

[3] *OECD Tourism Trends and Policies 2018 © OECD 2018*
[4] *ibid*
[5] *UNWTO*

2.2 National

Tourism is Ireland's largest indigenous industry employing 230,000 people nationally[6], one in every ten of the labour force.

Tourism is seen as a key growth driver in the Irish economic context and is essential to the stability and growth of employment in rural areas of Ireland. Ireland's tourism numbers have continued to grow in recent years and are now reaching record levels. This increase has led to capacity concerns in some areas of the country; providing an opportunity for counties who are keen to grow to respond to this demand.

On a national basis, the government has acknowledged the limited size of the domestic market, and the high existing level of domestic tourism consumption by Irish residents, which limits the potential for growth from domestic demand. Therefore, the government has indicated that the tourism sectors best prospects for growth are in generating increased levels of overseas visitors and revenue.

Latest figures for overseas visitors to Ireland show an increase of 6.6% in the first half of 2018, with a revenue increase of 9%.

The outlook for Irish tourism is good. 2017 saw large increases in the North American market with 2 million visitors, up 16.6% on the preceding year. Growth was also seen in visitor numbers from Australia and developing markets (13.1%); and from Mainland Europe (5.5%), with important markets like Germany, France, Spain, and Italy all recording strong growth. Increases in direct air access has and will continue to be a key growth factor.

This increase in visitors has been facilitated by a number of factors not least of which is the large increase in access to Ireland. 2018 saw an increase of circa 30 new routes to the island, including direct access to China and significant uplift in flights from USA and Canada. There are now 181 cities directly connected to Dublin Airport.

However, the decline in visitor numbers from Britain in 2017 continues to be a concern. Whilst there have been slightly better results in the first six months of 2018, seeing a 1% revenue growth and 2% volume from this market, this is coming from a lower base.

A recent Deloitte report found that holiday spend in Britain has declined for the first time in five years[7]. Travel GBI further notes that staycations are on the rise in the British market, with an increasing number of people saying that they will take their annual summer holiday in the UK.

The immediate impact on Irish tourism of the Brexit vote was the weakening of sterling which affected Ireland's competitiveness, making trips to Ireland by Britons more expensive. Visitors from Britain to Ireland fell by 5% in 2017, with a similar reduction in visitor revenue. There was a 3.5% decline in visitors in the 12 months to March 2018.

[6] *ITIC An Industry Strategy for Growth to 2025*
[7] *Tourism Ireland Soar report June 2018*

A softening consumer sentiment on the back of a six-year inflationary high in the GB market puts further pressure on potential holiday makers. Oxford Economics expects consumer spending growth to slow from 1.7% last year, to a seven-year low of just 0.8% in 2018.[8]

Britain represents the county's largest international volume tourism market and therefore a key risk. With this in mind a strategic focus on other international markets and the consolidation of the domestic market is likely to be key from a strategic viewpoint.

2.2.1 National Tourism Strategy

As previously referenced, the government's tourism policy statement *"People, Place and Policy Growing Tourism to 2025"* indicates that whilst domestic tourism underpins the tourism market offering, in order to reach its full potential Ireland must excel as a destination for overseas tourists.

The overarching goal of the policy is:

- **By 2025, revenue from overseas visitors, excluding carrier receipts, will increase to €5 billion in real terms (i.e. excluding the effects of inflation)**

- **Employment in the tourism sector will be 250,000 by 2025, compared with around 200,000 in 2015**

- **There will be 10 million visits to Ireland annually by 2025.**

It is clear that given the large increase in tourism volume and revenue, these targets will be met in advance of 2025.

The policy highlights that Ireland's people and places are consistently cited as the primary motivating factors for tourists choosing to visit and a major reason why they enjoyed their visit. Therefore, the report outlines that our people and places will remain the key pillars around which Ireland's tourism offering will be built and this is underpinned by an agreed policy framework.

The focus on people, place and policy is to maximise the export contribution of tourism, whilst protecting Ireland's natural, built and cultural heritage involving a change of focus from overseas visitor numbers to overseas visitor revenue.

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[8] *Tourism Ireland Soar report*

In the report the government affirmed and agreed that tourism would be a key element of Ireland's economic strategy, and that the tourism sector should develop sustainably in terms of economic and environmental activity. The role of tourism in promoting peace and political cooperation on the island of Ireland is further recognised and encouraged.

The report further highlights the following elements:

- That Ireland be actively promoted overseas
- The marketing of Ireland as a visitor destination will aim to generate a balance of visitors from both mature and developing markets
- Ireland's heritage assets will be protected
- That the tourism industry will have the capacity and capability to meet the evolving requirements of visitors, based on the development of human capital within the industry
- The responsibilities and expectations of government, state agencies, local authorities, the tourism industry and other stakeholders in the development of the tourism industry will be clearly set out with an increased role for local authorities and recognition of the contribution of communities to tourism
- The government's primary objective in tourism is to make the most of the services export revenue of the sector, therefore, the central tenet of the policy is for Ireland to reach its full potential as a destination for overseas tourism.[9]

The national tourism strategy as rolled out by Tourism Ireland and Fáilte Ireland in national and international markets focuses on key segments, target geographic markets and majors on four brands, namely The Wild Atlantic Way, Ireland's Ancient East, Dublin - A Breath of Fresh Air and Ireland's Hidden Heartlands.

Priority markets for the island of Ireland are Great Britain, the United States, Germany and France which deliver the majority of overseas visitors. These markets are referred to as Ireland's 'core' markets. They also represent four of the top five global tourism spenders in 2017 (UNWTO) with the fifth being China.

The key international segments are 'Culturally Curious' (who like to delve deeper into the history of a location, have unusual experiences and enjoy connecting with nature); 'Social Energisers' (young couples and adult groups looking for excitement, new experiences and fun) and 'Great Escapers' (who like to connect with the landscape, get a sense of history, and get away from it all).

In order to achieve successful growth and increase revenue for Wexford tourism the strategy that has been developed is aligned with Ireland's national tourism strategy. Consequently, Wexford will be required to create tourism experiences that are attractive to these target consumer segments, from the key source markets identified.

[9] *People, Place and Policy - Growing Tourism To 2025*

Critically, Wexford is a key 'ingredient' of the Ireland's Ancient East brand, which is positioned to offer holiday makers breaks in places filled with quirky and memorable experiences. A region of legends and stories from ancient times to the modern day - a place brimming with culture, attractions, festivals and fun.

Wexford has many of the key elements and assets, including the commitment and expertise from the local authority, key agencies and partners, to reposition itself as the 'must do' destination in Ireland's Ancient East and the strategy that has been developed seeks to facilitate this key objective.

2.2.2 Role of Tourism Agencies and Industry

Heatmap of Tourism Hotspots in the Republic of Ireland

Source: Fáilte Ireland
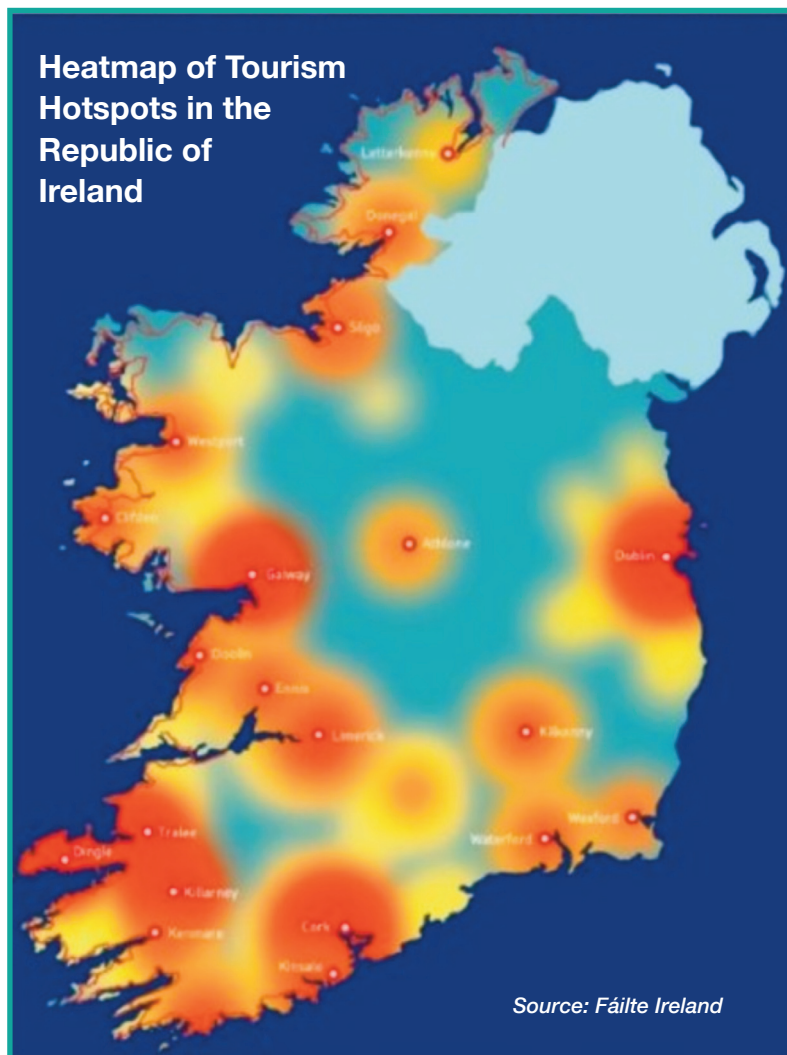
Tourism Ireland's role is to market Ireland in overseas markets, creating the conditions for sale of the Irish tourism product. This will have more relevance for Wexford as the destination evolves and provides Tourism Ireland with the bundled experiences necessary to promote the county and region in overseas markets.

Fáilte Ireland (the National Tourism Development Authority), is responsible for supporting the tourism industry and working to sustain Ireland as a high-quality and competitive tourism destination. Their remit is to provide a range of practical supports to help tourism businesses better develop, manage and market their products.

In the context of the strategy it is particularly important to note Fáilte Ireland is developing and supporting tourism potential by seeking to ensure a better regional spread of visitors though regional brands. The current geographic spread of visitors is demonstrated in the following visual.

One of Fáilte Ireland's key aims, via the Ireland's Ancient East brand, is to transform the east of the country (beyond Dublin) from a region people only visit briefly, en-route to somewhere else, to a touring region they want to stay and explore. The goal is to increase visitor spend in the region by 27% over the next 8 years. The target markets are both domestic and international. Stories are the key to making Ireland's Ancient East stand out in the crowded travel marketplace. Thus a unique stories-based approach is shaping everything to do with Ireland's Ancient East - from investment in brilliant new experiences and business development, to visitor information, marketing campaigns and online content. In doing so, Ireland's Ancient East will deliver on Fáilte Ireland's strategies for growth and support the success and development of the tourism industry and the south east of Ireland.

The success of any tourism strategy is reliant on a well-equipped and motivated industry to action the sale of Ireland's offering. The Irish Tourism Industry Confederation (ITIC), the representative body for the sector focuses on identifying and championing strategic issues essential to the continued success of tourism in Ireland, ITIC recognises the importance of a strong and motivated industry in its own strategy which it describes as "industry-led, government-enabled, and agency-supported".

It is critical that key stakeholders within Wexford's tourism system have a close and productive relationship with tourism agencies and industry bodies to ensure focused and relevant product and experience development that enhances the county's relevance on a domestic and international basis.

2.2.3 Role of the Local Authority

"People, Place and Policy, Growing Tourism to 2025" commits to "an enhanced role for Local Authorities and recognition of the contribution of communities to tourism."

Specifically, The Policy Envisages That Local Authorities Will:

- Continue to act as primary developer of a range of public tourism infrastructure, including urban and rural heritage

- Act as a link between the state tourism agencies and communities by supporting community effort regarding major national tourism initiatives

- Support community efforts in destination development, including assisting communities to align their efforts with the tourism agencies' strategies

- Provide a competitive environment for tourism enterprises through continued focus on high-quality maintenance of public infrastructure frequently used by visitors.

In this context Wexford County Council has published a Tourism Statement of Strategy and Action Plan 2017 - 2022 including a tourism work programme which matches objectives in the Wexford Local Economic and Community Plan with tourism development plans.

Other areas of concentration include festivals and events, marketing and communications and regional collaboration.

Given the importance of tourism to the county and in recognition of the economic and quality of life impacts of tourism, Wexford County Council has already, through economic and strategic planning, made provisions to support local industry and tourism development in general. A summary of these key plans and strategies are outlined as follows.

2.2.4 Wexford County Council County Development Plan 2013 - 2019

The County Development Plan commits WCC to supporting Fáilte Ireland in developing Ireland's Ancient East proposition and supporting its roll out across the county.

The plan outlines the importance of tourism in the economic development of Wexford detailing that:

- Tourism is an area of strength in Wexford where holidaymakers come to enjoy the county's extensive coastline and its rich architectural, natural and cultural heritage
- The Wexford County Development Board's Action for Change recommends maximising the tourism 'brand' identity of Wexford as a 'natural heritage and culture destination'

The council recognises the important role that tourism could play in economic development and will therefore aim to promote and facilitate the tourism role of Wexford, whilst protecting and improving the quality of the county's tourism products and environmental quality by facilitating the expansion of existing and the provision of new sustainable tourism products, facilities and infrastructure.

2.2.5 Wexford Local Economic and Community Plan 2016 - 2021

The Wexford Local Economic and Community Plan (2016 - 2021) is a vital reference point designed to guide and support socio-economic and community development and positive outcomes in the country to 2021.

The intent and focus of the plan is to support Wexford to be a county:

- With vibrant, diverse and resilient sustainable urban and rural communities experiencing a high quality of life
- Where people will want to live, work and do business
- Which offers its citizens quality employment opportunities
- Which offers high-quality urban and rural environments supported by excellent sustainable physical and social infrastructure and sustainable employment opportunities, and
- Which values its natural environment and heritage.

The plan emphasises the potential for County Wexford's local cultural heritage and natural environment to attract tourists to the area.

It outlines that further investment is required to enhance accessibility for international visitors and to improve related infrastructure.

High-level goals addressed by the document which relate to tourism include promoting tourism as a major sector for development, supporting rural tourism throughout the county and making the living environment more attractive.

2.2.6 Wexford County Council Economic and Community Investment Programme 2018 - 2022

The Wexford County Council Economic and Community Investment Programme 2018 - 2022 is designed to deliver a range of infrastructure projects within the county. It is projected that the €50 million WCC investment will be further built upon by public and private investment.

The investments are designed to maximise growth opportunities and pay particular attention to Wexford's unique heritage and rich culture. Among the major tourism related infrastructure investments are the following planned initiatives:

- The Wexfordia Attraction Cluster
- Rosslare to Waterford Greenway
- N11 cycle path
- Carrigfoyle Activity Centre
- Enniscorthy traffic management and infrastructure development
- Enniscorthy tourism project
- New Ross port and quays redevelopment
- Wexford Arts Centre
- Trinity Wharf development

2.2.7 South East Action Plan for Jobs 2015 - 2017

The South East Action Plan sets out ambitious targets for tourism in the region. Building on national targets, the SEAPFJ set outs an objective to increase overseas tourism numbers and revenues by a third and 40 per cent respectively by 2025, in particular through harnessing the full potential of Ireland's Ancient East.

The action plan calls out the proximity of the region to enterprise clusters and labour markets of Dublin and the south west, as well as the region's natural resources, creativity and design, and tourism and heritage assets from the Vikings and Normans to the homestead of President Kennedy as providing platforms for increased job potential.

Specific actions in relation to tourism include:

- Develop the south east experiences as part of Ireland's Ancient East achieving international "stand out" for the area based on its comparative advantage in built and cultural heritage
- The promotion and incentivisation of business links between tourism and food sectors and the promotion of local produce
- Coordination of attendance at trade shows on a regional level
- Further education and training programmes for new entrants to the hospitality sector as well as upskilling continuous professional development programmes for existing staff

- Develop school's tourism initiatives such as "know your own county" campaigns
- Ensure appropriate marketing material is available at Rosslare on key destinations in the south east
- Develop the rivers and coastal 'water margins' assets of the region including blueways
- Develop a plan to improve the visitor experience and business capability of water activity providers
- Develop a strategy to increase adoption and use of ICT technologies in marketing and delivery of tourism experiences
- Tourism and hospitality enterprises to collaborate to develop appropriate training for the hospitality sector to improve customer service standards.

2.2.8 Interreg Europe Projects[10]

Currently there are two important Interreg Europe projects that Wexford County Council are participating in and cooperating with. The projects are set out as follows:

Bealai na gCeilteach / Celtic Routes

The Celtic Routes project aims to encourage visitors to explore new areas of Wales and Ireland en-route to their final tourist destination. Led by Carmarthenshire County Council, the project will focus on the areas of Carmarthenshire, Pembrokeshire and Ceredigion in Wales and Waterford, Wicklow and Wexford in Ireland.

It aims to transform less well-known areas from transit zones to new touring sites, increasing the time visitors spend in these regions and capitalising on the opportunities to boost local economies.

The project will be developed through customer research, trade events and workshops as well as cross-border visits by businesses in Ireland and Wales to bring together expertise and ideas. The aim is to increase the visitor appeal of the targeted areas, including through the development of new trails linking local culture, heritage and the natural environment.

[10] *Project descriptions taken from the Interreg website*

Rediscovering Ancient Connections - The Saints

This project is designed to revive the ancient links between communities in Pembrokeshire and Wexford using the shared heritage of St David and his pupil and protégé, St Aidan.

St David is the patron saint of Wales, commemorated in the city of St Davids where he spent much of his life, whilst St Aidan is closely associated with Wexford, in particular Ferns. One objective of the operation is to motivate both communities to rediscover their shared heritage, others are to be a mentor for each other and to share knowledge, experience and skills. Another is to use this shared heritage as a means of attracting people to the cross-border region, specifically to Wexford and to Pembrokeshire (both "coastal communities"), who would not otherwise visit.

St David, the patron saint of Wales, is commemorated in the city of St Davids, where he spent much of his life, whilst St Aidan is closely associated with Wexford, particularly in the town of Ferns. As well as enabling both communities to rediscover their shared heritage, the project aims to use this shared history as a way of attracting new visitors to these coastal communities.

Led by Pembrokeshire County Council, in partnership with Pembrokeshire Coast National Park Authority, Wexford County Council and Visit Wexford, this cross-border project will drive forward economic growth across the two regions through regeneration, cultural and educational projects and business-to-business mentoring.

It is claimed St Aidan travelled from Wexford to Pembrokeshire to study under St David for several years. This mentor relationship inspired St Aidan to return to Ireland to build his own monastery at Ferns. Both Ferns and St Davids have historically important cathedrals, the cathedral at Ferns is the smallest in Ireland and the cathedral at St Davids is a key tourist destination.

There are plans for the restoration of St Non's well at St Davids, which is said to be the birthplace of St David. Permanent artworks will be commissioned in both regions which will thematically correspond with each other. Schools will take part in a joint project to animate the story of the two saints, with pupils taking part in a visit to the partner country.

2.2.9 Other Tourism Supports

In addition to structured strategies and programmes initiated by the local authority, Wexford County Council provides other supports which underpin the tourism infrastructure in the county including:

- An ongoing training partnership for tourism businesses with the local enterprise office
- Tourism surveys completed in collaboration with Visit Wexford
- Collaborative marketing initiatives with other local authorities in the region
- Infrastructural supports including public realm and placemaking initiatives and environmental and heritage maintenance support involving beach and town centre maintenance and support for visitor attractions and experiences.

2.2.10 Voluntary Activism

In additional to the various strategies, plans and other initiatives that have been put in place, the voluntary nature of much of the contribution to tourism in the county should also be recognised. A number of the standout initiatives within the county are volunteer led and enabled. The structures of tourism in the county could not continue, build or strengthen without community and voluntary commitment and support. Good examples of such initiatives include:

- Wexford Walking Trails - a community led initiative, (part of Wexford Trails) they operate a number of trails including forest trails at 21 locations across the county
- The Welcome Ambassador Programme - a volunteer initiative who offer a support and way-finding service to visitors to County Wexford at peak visitor periods during the year, e.g. during the Wexford Opera Festival and the Rockin Food Festival in Enniscorthy
- Lady's Island pop up coffee shop - a community initiative which operates a coffee shop during the summer season and at other times if required. It provides home baking and interaction with the local community who are providing a service as well as generating income for the local area
- The Bunclody Volunteer Tourism Office which provides a central hub for any visitors to the town to get information on attractions and activities to see and do locally.

2.3 Global and Macro Trends - the Shift Towards Millennials

In development of the strategy it is important that broader global trends are understood and responded to, thereby actively futureproofing Wexford's tourism offering.

By 2020, 50% of travellers worldwide will be millennials (born 1974 - 1980), they are therefore becoming the most important generation of travellers and must be considered when creating a tourism product.

Millennial travellers seek an authentic, personalised experience and it is important for them to feel unique. Travel is an opportunity to develop their identities (especially in a social media context) particularly through culturally-rich experiences and exploration of the unknown[11]. This means millennial travel experiences involve more adventure and the desire for more customisation. Millennials make a greater effort to save for travel - 7 more than any other generation.[12]

Activity destinations that offer music, food and up-close nature experiences are top of mind for millennial travellers in 2018.[13]

These trends and consumer needs are matched in many cases by Wexford's outdoor and coastal natural assets. The task at hand is to ensure these experiences are accessible and bookable allowing prospective visitors to customise and promote their visit through social media channels.
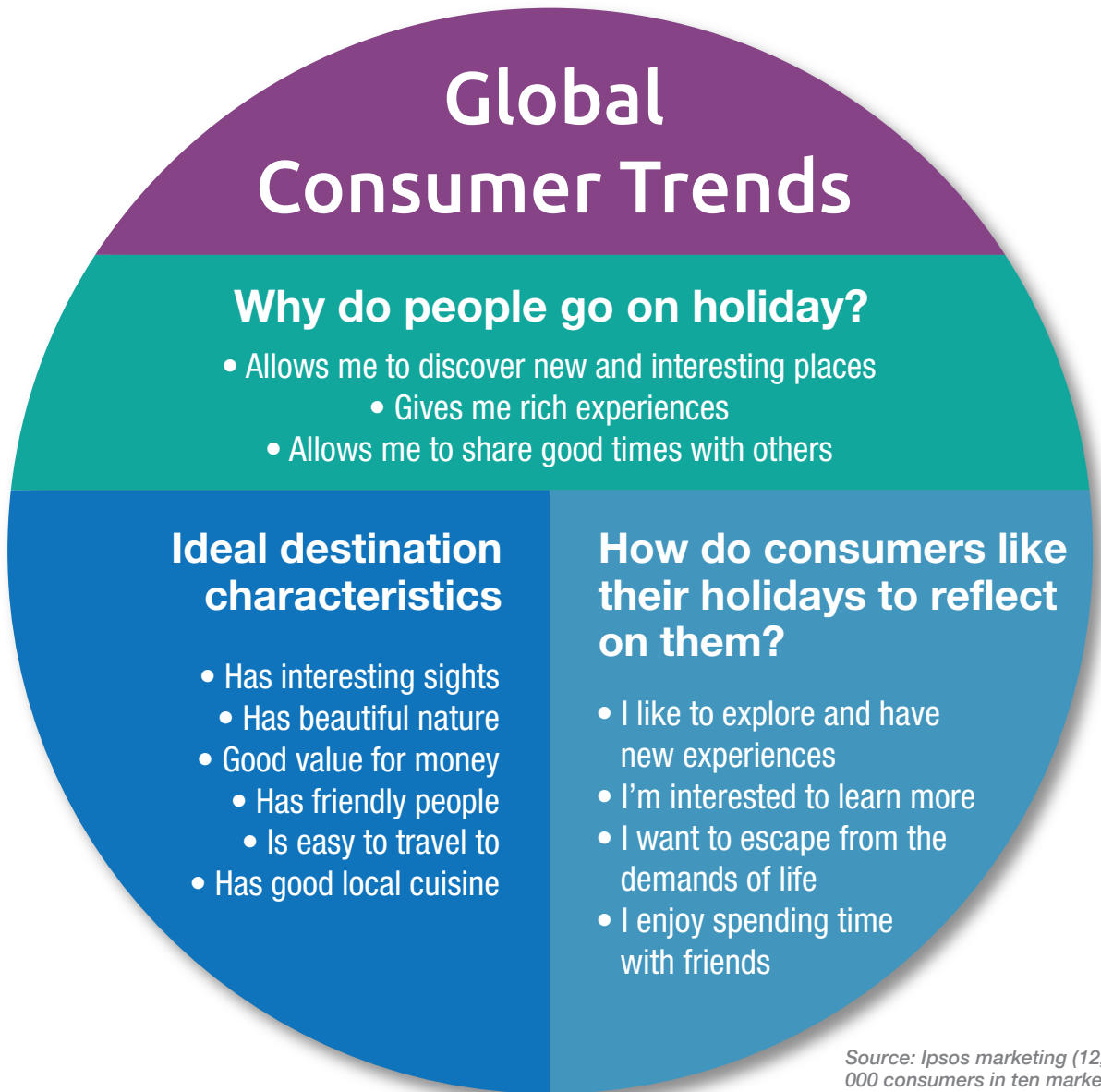

[11] https://www.forbes.com/sites/jefffromm/2017/11/08/why-millennials-are-the-most-important-consumer-generation-for-the-travel-industry/#577adfb5e1f1
[12] https://viewfinder.expedia.com/wp-content/uploads/2018/01/Expedia-Generations-on-the-Move.pdf
[13] travelagentcentral.com

2.3.1 Key Consumer Trends

A global survey of 12,000 consumers conducted in ten markets provides an insight into how the global consumer thinks about a holiday and what they are seeking.

Global Consumer Trends

Why do people go on holiday?

• Allows me to discover new and interesting places
• Gives me rich experiences
• Allows me to share good times with others

Ideal destination characteristics

• Has interesting sights
• Has beautiful nature
• Good value for money
• Has friendly people
• Is easy to travel to
• Has good local cuisine

How do consumers like their holidays to reflect on them?

• I like to explore and have new experiences
• I'm interested to learn more
• I want to escape from the demands of life
• I enjoy spending time with friends

Source: Ipsos marketing (12, 000 consumers in ten markets).

Consumers increasingly see their holidays as an extension and reflection of themselves. The discovery of new and interesting places, exploration and learning are major themes. Additionally, getting away from it all and spending time with friends are important factors.

Key consumer trends analysis in the global travel industry provide some further points for consideration, detailed as follows:

➡ Cost, things to do, and food offerings are the initial pieces of information sought at inspiration stage when consumers are thinking about holidays.

➡ In the coming years a larger older population profile will lead to a greater number of older leisure travellers. This group is not homogenous. There are senior travellers for whom price will be their primary focus[14]. The growth in older visitors will also have implications in relation to infrastructure and support services.[15]

➡ Digital touchpoints are growing significantly which provides an opportunity to access more data regarding traveller habits and preferences. The continued adoption of new technologies by the consumer as part of their booking process and of their holiday experience itself is relevant to how industry portrays their offerings and how experiences are developed.

➡ Google can play a larger role in travel distribution - including, should it so choose, to become an OTA (online travel agent), whether through acquisition or by launching a product of its own. For different types of travel shopping experiences, this will drive a change in consumer behaviour and mobile interaction will become the dominant consumer channel.[16]

➡ Airlines currently rate their mobile apps as their fifth most important channel but anticipate mobile will be the most important channel by 2021.

The evolving nature in how tourists 'consume' data and how they use a holiday to reflect themselves is relevant to future proofing any tourism strategy. Therefore, key elements such as cost, digital bookability, partnerships with OTAs, use of apps whilst visiting (requiring high-quality WIFI), and promotion via social media must be top of mind when implementing the strategy for Wexford.

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[14] *Euromonitor Understanding the Travel Industry in Europe and UK*
[15] *OECD Tourism Trends and Policies 2018*
[16] *Skift 2016*

2.3.2 Consumer Experiences

Consumer research has underpinned the development of Fáilte Ireland's signature experiences with a major focus being on immersive and 'hands on' experiences. Consumers want to be active participants (not spectators), seeking to learn from the places they visit and interact with the people and culture. Underpinning any visit is the consumers need to book easily and sample unique and special food and drink experiences. Experiences need to be connected and easily accessed, encouraging visitors to stay longer and spend more.

Outdoor adventure and activity tourism such as walking and cycling have been identified as particular growth sectors worldwide. This has particular relevance in the Wexford context given the existing natural resources and the opportunities which can be unlocked for rural Ireland.

The government's strategy for the future development of Greenway's states that: "The development and promotion of this sector provides opportunities for growth, in rural areas in particular, by facilitating businesses to leverage the tourism assets in their area in a sustainable way to support recreational activities such as canoeing, cycling, angling and hill walking".

Many countries point to their cultural and natural heritage as lying at the heart of their visitor appeal. A recurring theme internationally is the maximisation of initiatives which focus on nature-based tourism, wilderness areas and outdoor activities. A range of countries, including Canada and Chile, have programmes to strengthen their destination image through links to their national parks. Walking and cycling are seen as providing important market opportunities in many countries with very different terrain and landscapes.[17]

In addition to outdoor adventure consumers are seeking to experience and engage in a destinations-built heritage. Built heritage consists of all aspects of the man-made historic environment such as houses, factories, commercial buildings, places of worship, cemeteries, monuments and built infrastructure: railways and bridges; physically created places such as gardens, mining sites and stock routes; and other places of historical significance such as archaeological sites. Wexford has an abundance of built heritage assets. By harnessing existing built heritage assets Wexford has the opportunity to attract and increase the dwell time of visitors - delivering incremental visitors and bed nights to the county.

As Wexford has many of the key ingredients identified in relation to consumer experiences there is reason to be ambitious regarding tourism repositioning and growth within the county and region.

[17] *OECD Tourism Trends and Policies 2018*

2.3.2 Implications for Wexford Tourism

Taking on board and assimilating consumer trends into future plans will assist industry in attracting visitors to Wexford.

By analysing visitor expectations in Ireland's core markets (North America, France, Germany, UK) we are in a position to highlight major elements for Wexford's tourism industry to pay attention to including the following:

- Consumer trends indicate that interactive experiences and things to do attract visitors. These experiences must be visible to potential tourists when they are researching a holiday, it is also important that they be bookable in advance of travel. Attractions and things to do need to be visible and bookable. Increasingly visitors from the US want to book attractions in advance of travel. Trade and industry and attraction providers need to consider this in how they market and sell their product.

- Cost and value for money (VFM) are very important when making purchase decisions and must be attractive.

- Having a variety, depth and breadth of things to do are crucial in holiday decision making and this has implications for trade and industry. Features on online travel agent (OTA) sites need to include not only information about a particular hotel or attraction but must highlight what to see and do in the locality and region. This will drive consumer insight and give them a flavour of the region.

- Food is very important to the consumer. They consider it not as just a nutrition stop but a subset of things to see and do. Trade and industry must go beyond outlining the quality of Wexford produce to exemplifying the superb offerings of the finished product. It is a major part of the experience on holiday and should be represented to the consumer. Food is considered as a proxy for the quality of a destination, generally its importance should not be underestimated.

- Demographic factors such as an increasing global middle class, the desire of millennials for experiential holidays and continuing increase in older travellers appear to present significant growth opportunities for the tourism industry. As the population ages and more people enter the retirement phase of their lives, they are more likely to spend income and savings on leisure activities such as travel, therefore industry should be mindful that larger numbers of older travellers will mean physical infrastructure and accessibility implications for attractions and hotels as they are likely to have particular physical needs.

- According to recent research conducted by Behaviour and Attitudes 50% of visitors make up their mind on where they will visit only after they have entered the country. With this in mind there is a major opportunity to target and influence these visitors at international access points (with Dublin and Rosslare being the two).

2.4 Conclusion:

- Whilst the majority of macro factors in the context of this strategy should encourage Wexford to move forward with ambition and optimism, given the duration of the strategy and the variety factors that could fluctuate (positively or negatively), it is important to develop a strategy that, insofar as is possible, maximises potential whilst also considing and mitigating against key threats.

- The broader tourism environment in which Wexford is functioning has the support and research in place to assist with growth, this resource should be maximised for strategy implementation.

- National tourism strategy is focused on key source markets and key customer segments with national tourism bodies focused on developing and promoting experience brands. Insofar as is sensible, Wexford should fully align its efforts with the national strategy, particularly in relation to Ireland's Ancient East.

- Consumer trends indicate that interactive experiences and things to do attract visitors. Cost and value for money (VFM) are very important when making purchase decisions, as is food which is not just a nutrition stop but a subset of things to see and do. These key factors need to be addressed by the future tourism strategy for Wexford.

- Consumer trends are moving ever closer to a complete dominance by technology channels in the research, planning and purchase of holidays. This is an area which Wexford needs to be brilliant in order to stand out at pre-planning stage.

- The elements outlined have and must continue to be considered when developing and delivering tourism experiences in Wexford.

3. Situational Analysis

Situational Analysis

Part One
I. Performance
II. Geographical qualities and access
III. Sectoral characteristics
IV. Conclusion

It is important in planning for growth to understand the context and environment in which Wexford is operating.

This chapter examines Wexford's recent tourism performance and how this compares to peer counties and Ireland as a whole.

It also set out what is currently in place i.e. Wexford's core offering and details key elements as they relate to geography and landscape, whilst also examining the dimensions of access and sectoral characteristics.

3.1 Performance

In order to begin evaluating the potential for future growth it is necessary to assess recent performance to discover strengths, opportunities and challenges.

Table 3.1.1 Wexford tourism revenue figures 2013 - 2017

Overseas Revenue (€ million)	2013	2017
Total	60	61 +0.1

Domestic Expenditure (€ million)	2013	2017
Total	112	146 +30%
Total Revenue 2013 - 2017		

Source: Fáilte Ireland Regional Tourism Performance 2013 - 2017

Wexford has a strong domestic visitor base and performs ahead of neighbouring counties in relation to revenue from domestic visitors. This indicates a well-established reputation as a domestic visitor destination. Notably Wexford receives twice as much revenue from domestic versus international visitors and did not grow the revenue contribution from overseas visitors from 2013 to 2017.

Table 3.1.2 Wexford tourism visitor figures 2013 -2017

Overseas Visitors (000's)	2013	2017
Total	229	232 +0.1%

Domestic Trips (000's)	2013	2017
Total	518	654 +26%
Total Visitors 2013 - 2017		

Source: Fáilte Ireland Regional Tourism Performance 2013 - 2017

As is the case with revenue, visitor figures are strongly weighted towards the domestic market. Most notably it would appear that the domestic market for Wexford appears to be more robust showing significant double-digit growth over the period 2013 to 2017. The volume of overseas visitors however has remained static (in a time where nationally there has been significant growth of 34 percent).

Source of Overseas Tourists to Wexford 2012 - 2016
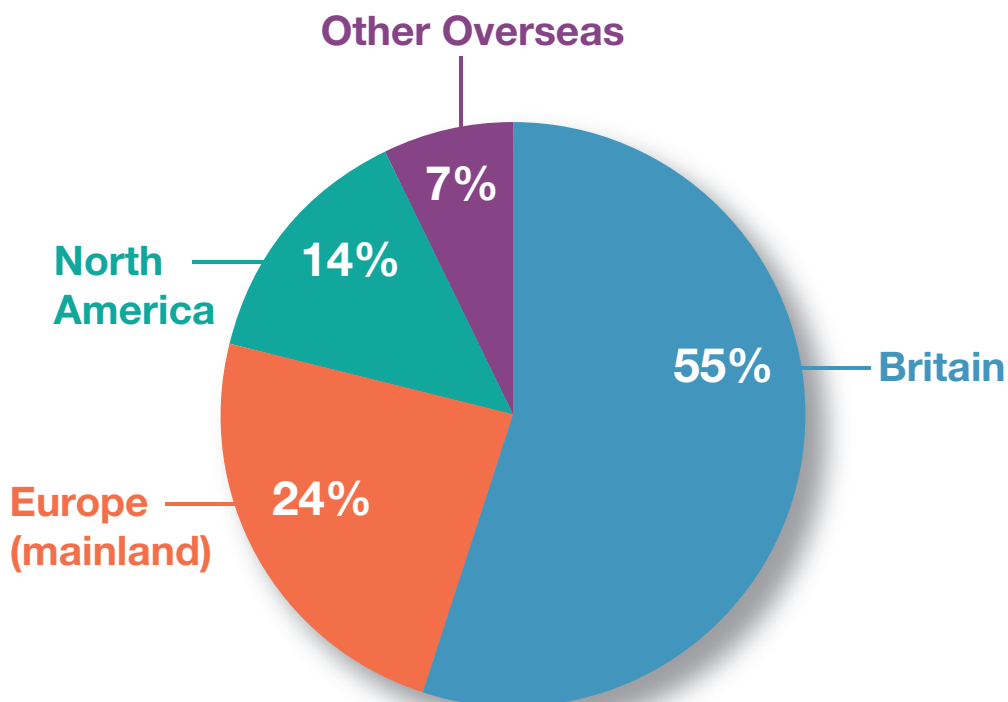
Source: Fáilte Ireland Regional Tourism Performance 2012 – 2016. Figures based on revenue.

Table 3.1.3 Tourism revenue in Wexford and neighbouring countries 2012 - 2016

Country	Wexford	Waterford 2012 - 2016	Kilkenny 2012 - 2016	IOI Visitors 2012 - 2016	Wex V IOI 2016
GB	55%	37%	32%	28%	125%
Europe	24%	29%	29%	33%	94%
N AM	13%	21%	28%	27%	86%
Other Overseas	7%	14%	12%	11%	96%

Fig: 3.1.1 Overseas revenue share Wexford versus island of Ireland and neighbouring counties source: Fáilte Ireland Regional Tourism Performance 2012 - 2016 and Tourism Ireland 2016 revenue numbers and market share area.

Figure 3.1.2 Visitors to Co. Wexford by source market 2012 - 2016 (revenue based)
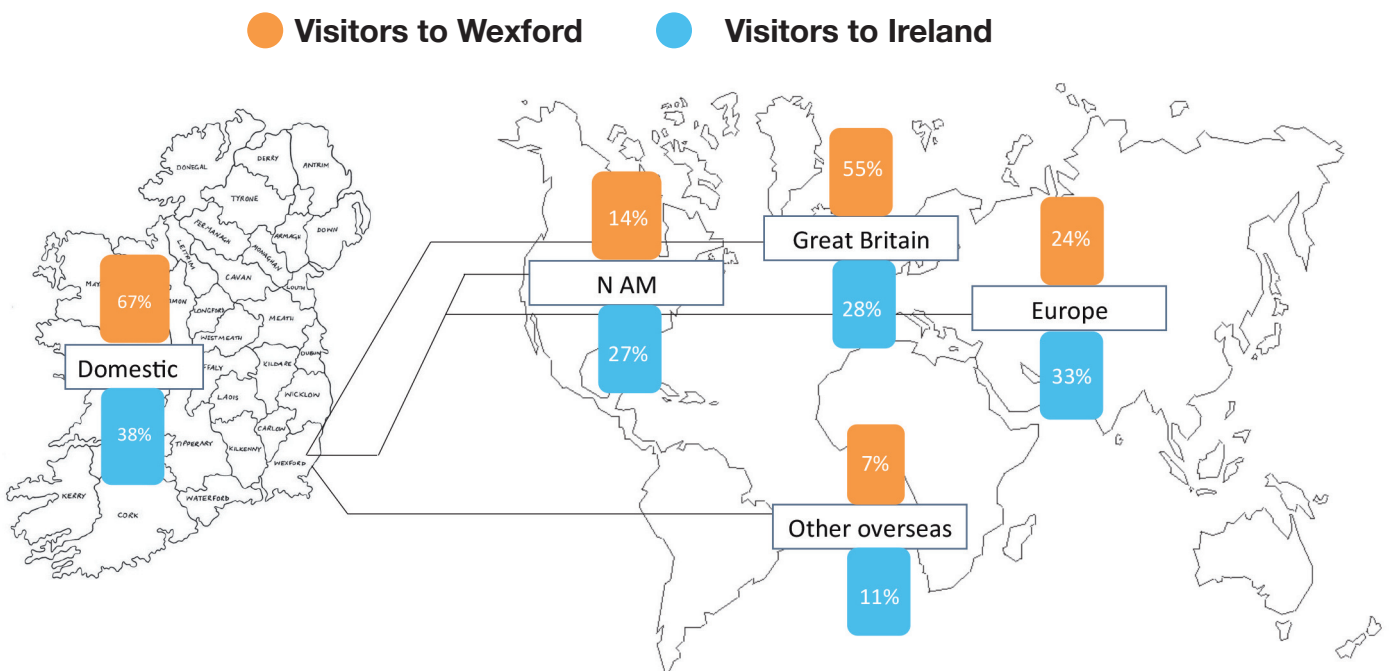
Source: ITIC, Tourism Ireland and Fáilte Ireland, figures based on revenue https://www.rte.ie/news/business/2017/1228/929923-irish-tourism-industry-confederation/

In the five years 2012- 2016, 55% of overseas visitor revenue in Wexford was from British visitors, this compares to a lower national figure of 28%, indicating a high revenue reliance on GB. Similarly, on the island of Ireland as a whole, 28% of overseas revenue comes from North American visitors but Wexford has a lower level of 14% from this high value market.

Analysis of visitor numbers in the region indicates that international visitors are touring the region, but not necessarily visiting Wexford in a quantum that might be anticipated.

On a national basis spending by visitors from North America and mainland Europe is ahead of British visitor spend for the first half of 2018[18]. Tourism Ireland's market diversification strategy prioritises North America and mainland Europe as markets which offer a strong return on investment. Given that international tourists have higher spending levels per capita it is sound a strategic choice for Wexford to aim to attract a higher proportion of these visitors who are already visiting the region.

Whilst international visitor numbers are growing extremely well on a national basis and in a regional context Wexford's numbers remain stagnant and the county is in danger of being left behind regionally.

In conclusion, it is apparent that the basis of Wexford's current tourism business (visitor numbers and revenue) has a strong bias towards the domestic and GB markets. In looking towards the future, it will be imperative that Wexford seeks to diversify its visitor and revenue base, in doing so generating more value and creating a broader and more diverse visitor base in the county.

3.2 Geographical Qualities and Access

Wexford has an abundance of natural assets. The coastline that extends to approximately 246 km. The eastern and southern parts of the county boast seven Blue Flag beaches, eight Green Coast beaches (less developed and populated than Blue Flag ones with excellent water quality), nine Special Protection Areas for marine and terrestrial habitats, 17 piers and three harbours.

The county's landscape varies from rolling countryside to mountains. Geographical stand outs include the Hook Peninsula on the south west coast, the Sloblands and Wexford Wildfowl Reserve in the east and the Slaney and Barrow river valleys which lead to the foothills of the Blackstairs Mountains in north west of the county.

The county has four large towns; Wexford and New Ross are located in the south and west of the county, whilst Enniscorthy and Gorey lie in the northern part. The county has a strong network of smaller towns, villages and rural settlements which support the county's rural population.
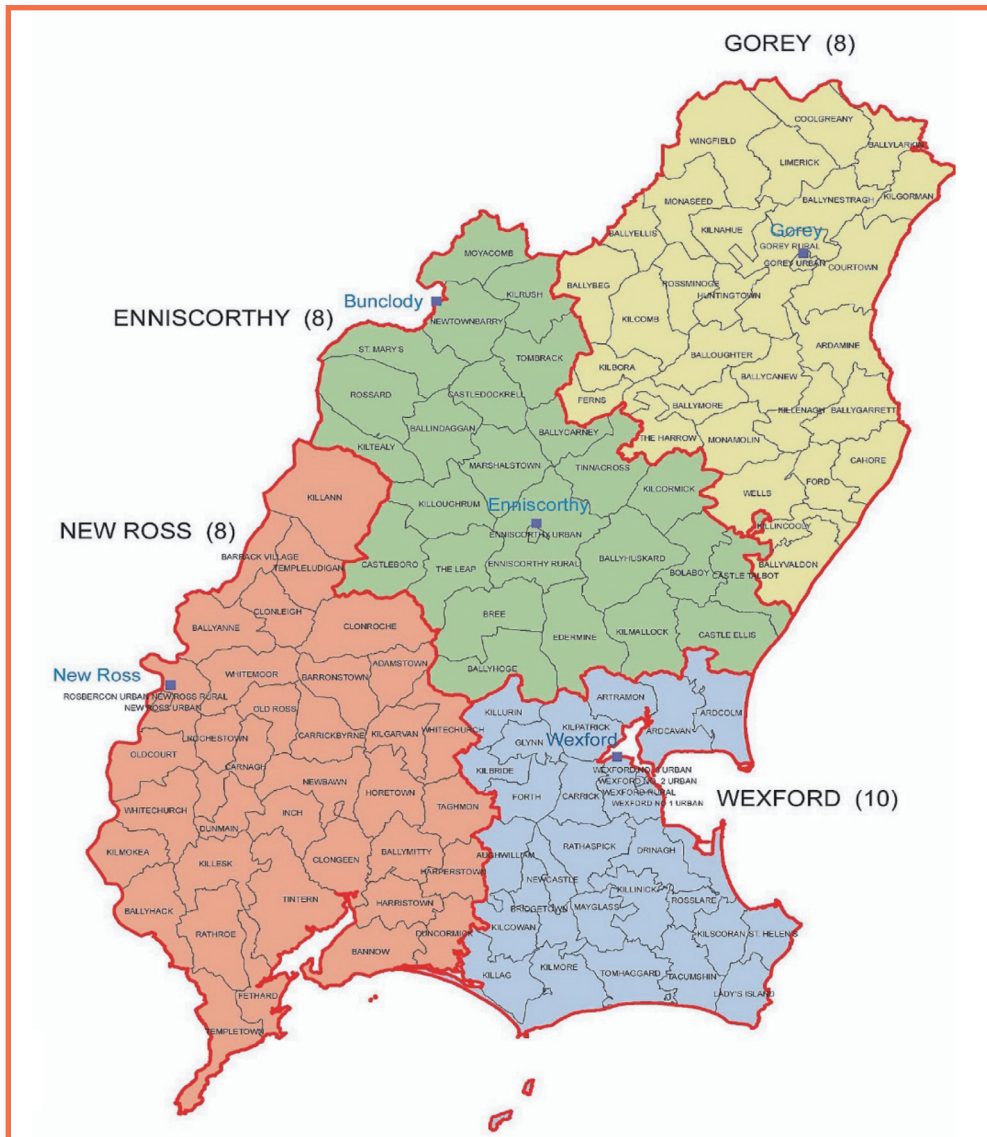
Figure 3.3 Wexford Local Authority Districts

Many of these geographical assets are familiar to a domestic audience but are not internationally recognised and there is an opportunity to leverage these key assets in the future.

Regionally, Wexford is well placed to attract visitors from and collaborate with neighbouring counties in the context of the Ireland's Ancient East proposition. Looking at tourism as a regional initiative is a logical strategic choice. Major attractions in neighbouring counties include Kilkenny Castle (400k visitors) and House of Waterford Crystal (200k visitors). Proposed developments such as the New Ross to Waterford Greenway and Rosslare to Waterford Greenway will support regional interconnections and cross collaboration.

Additionally, The Viking Triangle in Waterford and Waterford Greenway are two specific attractions which can be linked with Wexford's offering enabling bundling and cross promotion and playing to geographical, cultural and historical strengths.

3.2.1
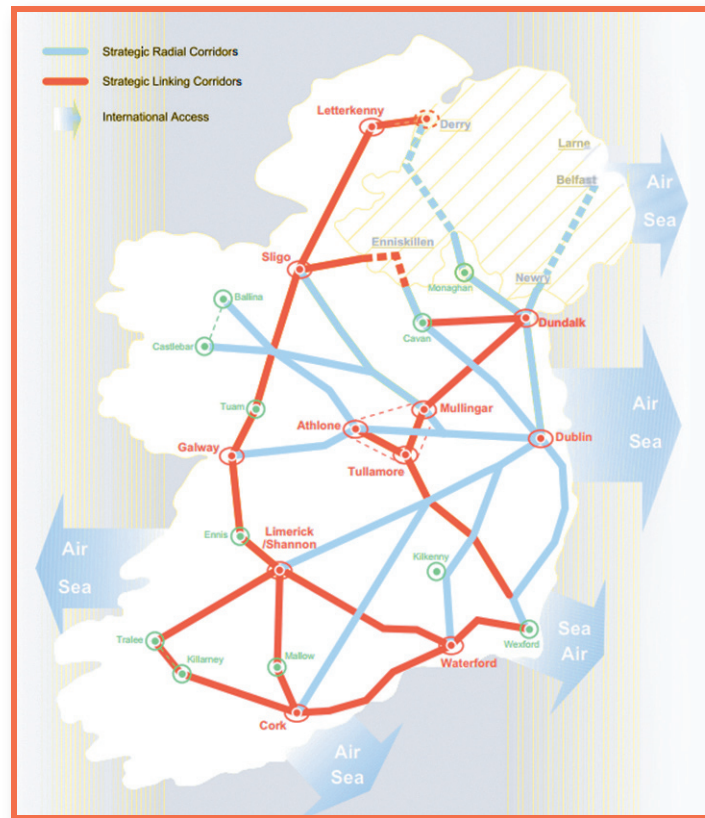
Fig: 3.2.1 Access routes to Wexford – National Transport Framework

The Rosslare Europort handles 270,000 vehicles per year (other than freight). As a key access point to the country the port provides an opportunity for Wexford to capture and increase dwell time among visitors who may intend to travel to the west or other parts of Ireland. Providing visitors with information about what is on offer in Wexford in advance of travel and upon landing at Rosslare will assist in this aim.

Visitors en-route from France, Ireland's fourth largest overseas market, provide an opportunity to increase visitation with targeted pre-travel and post-landing campaigns. Almost half of French visitors to Ireland belong to the 'Culturally Curious' segment. For this segment visiting churches and cathedrals, historic houses, national parks and forests are among their preferred activities - all of which are in line with Wexford's offering[20]. It is suggested that promotional material highlighting the county's tourist offering be made available on ferries arriving into Rosslare Europort.

It is also important to note that during the course of the development of the strategy the Irish Ferries service from Rosslare to France ceased and was re-routed to Dublin. This presents a loss of important access and the immediate implications of this development should be considered and acted up by key tourism stakeholder within the county.

[20] *Tourism Ireland France Market Profile*
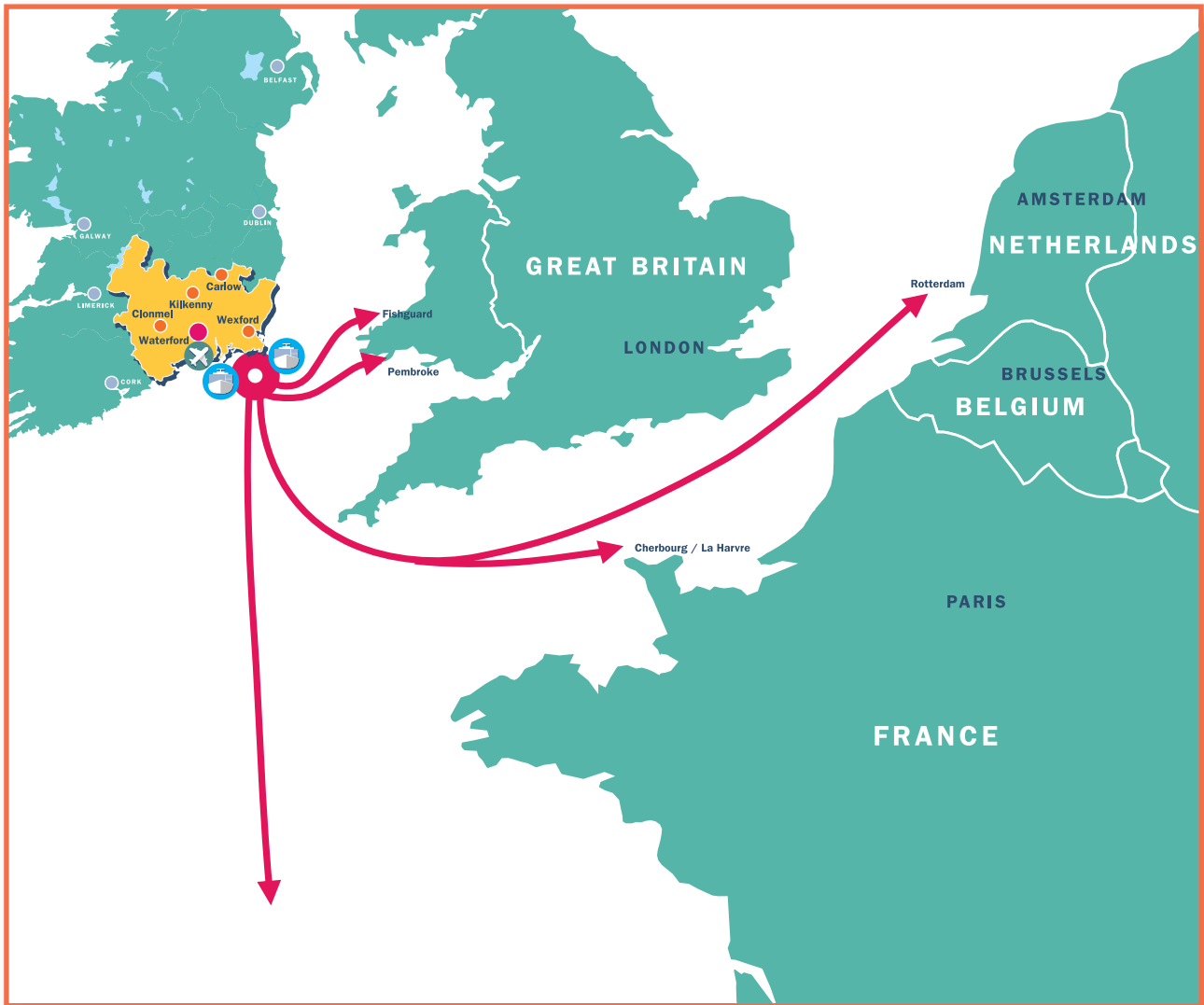
Fig: 3.3.2 Access routes by sea to Rosslare Europort.

It can be concluded that whilst access could be enhanced it is not currently a critical impediment to future growth of tourism in Wexford. Indeed, it would appear there is an opportunity to increase the dwell time of visitors 'passing through' Wexford and encourage those accessing the island of Ireland via Wexford to spend time in the county.

3.3 Sectoral Characteristics

*"Tourists do not choose between competing accommodation operators, tour operators or transport providers, in the first instance. **Customers choose a destination.** The quality of the tourism offering, including natural scenery, culture, and visitor attractions and events, are all are all contributors to the overall attractiveness of the destination. Therefore, **the effective combination of Ireland's people and place are key to our tourism success,** and this Tourism Policy Statement emphasises the strong foundation that this provides for further growth". (People, Place and Policy Growing Tourism To 2025) DTTAS.*

The tourism industry is a vital element in the delivery of a world-class experience to tourists. Industry is where the final sale and delivery of the product/experience happens. However, it is the combined effort of industry, government agencies and local authorities that create the optimum conditions for the sector to thrive.

Whilst traditionally local authorities have supported capital infrastructure and the development of public realm, the 'Putting people first – Action programme for Local Government 2012' Dept.of Housing, Planning & Local Government outlined a new role for local authorities in the context of economic development, including tourism. New roles include:

- Festival funding
- Community tourism
- Technological support and infrastructure
- Training
- Local development supports
- Enterprise support and funding
- Invest in tourism attractions and infrastructure
- Environmental assets (beaches)
- Interpret local heritage and support festivals, events and tourism promotion

Therefore, those at the coal face of interaction with, and delivery of, world-class experiences to visitors, namely the tourism trade and industry in the county, in partnership with government agencies, local authority, key partners such as Wexford Trails, key funders such as Wexford Local Development (WLD), community and voluntary activity are crucial to successful implementation.

The tourism trade in Wexford can be characterised by:

Consisting mainly of small operators spread over a wide geography

Accommodation-led offerings with a domestic focus

An appetite and willingness to harness Ireland's Ancient East and regional experience but a lack of clarity as to 'how to' roll out the proposition's experiences

A lack of cohesion within industry (which is recognised by them) with a commitment to work more collaboratively

Communities which have access to and knowledge of tourism assets but do not have the 'how to' implementation skills to unlock this element.

The above summary of key characteristics brings with it both opportunities and challenges. Whilst the strategy that has been developed seeks to address key challenges and exploit opportunities the onus will be on all stakeholders to collaborate so that Wexford tourism thrives. It is vital that the tourism industry in Wexford is at the forefront of these efforts.

3.3.1 Product and Experiences

In determining how best to evolve Wexford as a destination it is necessary to determine what is currently available in order to elaborate as to how to continue the creation of outstanding visitor experiences.

Wexford has an abundance of unspoilt natural scenery, coastline, heritage and cultural offerings. The following section identifies what is currently attracting visitors to Wexford and summarises the county's key offerings in terms of heritage and culture, outdoor activities (land and sea), family activities and other tourism assets.

A summary of Wexford's tourism offering in terms of land-based, water and sea-based activities, family activities and other notable tourism assets is detailed in the appendix of this document.

3.3.2 What Is Currently Attracting Visitors? Wexford Top Attractions 2016

Wexford top attractions 2016	Visitors
Wells House & Gardens	130,239
The JFK Memorial Park	105,594
Irish Agricultural Museum & Johnstown Castle Gardens	80,584
Dunbrody Famine Ship	66,400
The Irish National Heritage Park	60,400
Hook Lighthouse Visitor Centre	46,593
Dunbrody Abbey and Visitor Centre	20,000
Wexford Wildfowl Reserve	19,733
Colclough Walled Garden	18,161
Tintern Abbey	16,114
Kennedy Homestead	9,000

Source: Fáilte Ireland's Survey of Visitor Attractions

Based on a review of the attractions that tourists are visiting in Wexford, it is apparent that the county's heritage and cultural offering represent a key current strength.
The county offers a breadth and depth of heritage and culture experiences, many of which are already enjoying significant footfall in terms of visitors.

In addition to the top visited attractions detailed, Wexford has a wealth of tourism attractions including Enniscorthy Castle; Loftus Hall; The Ros Tapestry; Ferns Castle; Tintern Abbey; Selsker Abbey; the National Opera House; Johnstown Castle Vinegar Hill and the JFK Homestead which are all significant tourism attractions with good visitor numbers. Duncannon Fort is also marked for redevelopment and reopening in the future.

Alongside the heritage and cultural offering (which is key in the context of Ireland's Ancient East) Wexford offers a broad range of outdoor and family activities – on land and sea, indoors and outdoors. In particular the county has a well-developed walking trail offering. From Bunclody and the Slaney River Valley to the wild Hook Peninsula there is a depth and breadth of offering in the Wexford Walking Trail.

In the context of Wexford's offering it is worth considering the range of activities that visitors engaged in on the island of Ireland in 2017 and the alignment between these activities and what Wexford has to offer.

Table 3.3.3 What activities did visitors engage in in 2017?

Tourist Preferred Activities		
Overseas Visitors		
Overseas Participants (000s)	**% of total overseas interested**	**Wexford's matched offering**
Hiking/cross-country walking 2352	26%	Independent and guided walking tours Walking trails Wexford Trails (walking, gardens, craft, heritage) Forest trails Greenways - New Ross to Waterford and Rosslare to Waterford (proposed) The Norman Way Coastal walks Blackstairs Mountains
Cycling 416	5%	EuroVelo The Norman Way Greenways (proposed - see above) Wexford cycle routes (loops: Slaney, coastal, south Wexford)
Golf 257	2.8%	12 golf courses in the county, six courses are championship and many are links courses
Equestrian 142	1.5%	There are a range of riding schools in Wexford which cater to groups, some also provide language classes
Angling 135	1.5%	Lakes, rivers and coastal fishing Sea angling onshore and charter (world-class seabass fishing and new species) Fishing guides and tuition services available

Tourist Preferred Activities

Domestic Visitors

Domestic Interests	% of total domestic	Wexford's matched offering
Houses/castles	26%	Large number of castles and houses to visit including: Well's House and Gardens, Johnstown Castle, Enniscorthy Castle, Duncannon Fort, Ferns Castle, Loftus Hall, Tintern Abbey, Dunbrody Abbey
Hiking/walking	25%	Independent and guided walking tours Walking trails, Wexford Trails (walking, gardens, craft, heritage), Forest trails Greenways (proposed), The Norman Way Coastal walks, Blackstairs Mountains
National parks	23%	No current national park offering
Gardens	21%	Colclough Walled Garden, Coolaught Gardens, Glenavon Japanese Garden, John F. Kennedy Arboretum, Johnstown Castle, Kilcannon Garden Centre, Kilmokea Gardens, Kilmurry Nursery and Garden, Marlfield House and Garden, Newtownbarry House, Gallery and Garden, Springmount Garden Centre,Beechdale Garden Centre, Cois na hAbhann Garden Centre, The Bay Garden, Wells House and Garden, Wexford Lavender Farm, Woodville House Gardens
Visits to spas	21%	15 spas in the county ranging from day spas to luxury hotel offerings
Watersports (excluding swimming)	19%	Canoe and kayaking Surfing, stand up paddle boarding and sandboarding Coasteering Kitesurfing Powerboat tours Island visits with food experiences Sailing Angling and sea fishing Blueway*

*Feasibility study underway.
Source: Fáilte Ireland Tourism facts 2017

3.3.4 Core Market Profiles

In addition to examining what tourists do when holidaying in Ireland, it is also important to identify activity preferences across the key overseas markets. The following table sets out what these activity preferences are and also importantly the percentage of holidaymakers from each market that visited the south east region

Market Profile Element	USA	Germany	France
Activity Preference	96% visit sites of historical interest 84% excursions/events (national parks/ gardens/ festivals) 40% hiking/ walking	95% visit sites of historical interest 89% Pastimes/ events (national parks/ ardens/ festivals) 58% activities (hiking, cycling, water based)	96% visit sites of historical interest 88% Pastimes/ events (national parks/ gardens/ festivals) 54% activities (hiking, cycling, fishing, equestrian)
Profile Of Holiday Maker	58% over 35 92% ABC1	50% under 35 90% ABC1	50% under 35 88% ABC1
Percentage That Visit South East	17%	16%	15%

Source: Tourism Ireland market profiles (2016 figures)

Implications:

Visitors from Ireland's core overseas markets have particular interest in historical sites, gardens, festivals and walking, all of which are available in Wexford. In particular there is a major opportunity to, in response to interests identified, develop a range of 'themed experiences' that are connected to and bring alive the Ireland's Ancient East brand in Wexford, e.g. the Norman Experience, the Viking Experience, castles and conquests etc. National parks rate highly as an area of interest for domestic and international visitors and whilst Wexford has ample walking and scenic areas, they are not currently connected so that they are defined as a national park. This could represent a future opportunity for the County Council and partners.

The clustering and packaging of activities as well as visibility and ease of booking, necessitating industry collaboration, is crucial to increasing consideration of Wexford. This will require outstanding marketing, focused investment and a coordinated effort across key stakeholders to ensure 'brand' Wexford is viewed as both coherent and compelling.

Other Tourism Assets

In addition to the range of 'things to do' outlined, Wexford has mix of other experiences on offer, these are summarised as follows:

Genealogy - particularly based around the Dunbrody Famine Ship, JFK Homestead and the William Marshall legacy. A diaspora link with Savannah, Georgia is already established and could be built upon to include a Norman element and links to the USA via Norman lineage/ historical interest.

Arts, Opera and Festivals - Wexford has a number of festivals throughout the year which could potentially be expanded. They have the potential to play a key role in attracting both domestic and international tourists. The range of festivals is expansive, including such highlights include the Wexford Opera Festival, Enniscorthy Rockin Food Festival, The Eugene O'Neill International Festival of Theatre, Wexford Maritime Festival, Viking Fire Festival, Write by the Sea, Gap Arts Festival, the new WellWex Festival, Freedom Fit and the Kilmore Quay Seafood Festival. Further development and investment in the county's festival offering will strengthen the appeal and relevance of Wexford as a tourist destination.

Food - the county has a number of renowned chefs, food experts, cookery schools and hotels with an established food reputation and a wealth of natural assets and produce which can be referenced to enhance the already established food reputation including seafood and an abundance of fruit and fresh produce.

With food tourism being a key drive of tourism worldwide and a core focus on Fáilte Ireland's development work, it will be imperative that Wexford's food offering and reputation continues to be developed. Key to this development will be key initiatives such as Taste Wexford. Providing a connection point to food and drink experiences, farmers markets, food festivals, food and drink excursions/tours and food retail offers, Taste Wexford provides a platform to engage and educate tourists with the county's offering. The Taste Wexford proposition has the capacity to build further the profile of the county's food and culinary offering and therefore should be continually developed and funded.

Alongside Taste Wexford, initiatives such as the Wexford Food Family can play a powerful role in continually strengthening the county's food and drink reputation. With in excess of 30 members the Wexford Food Family actively promotes the Wexford food brand locally, nationally and internationally.

The integration of Taste Wexford, the Wexford Food Family and other emerging food and drink initiatives as a core part of the county's tourism offering should be welcomed and supported.

Spas/ luxury offerings and fine country house hotels – Wexford has number of 'destination' hotels that have the capacity and do attract visitors based on their offering alone. The further development and enhancement of these standout offerings can only strengthen the county's appeal. A key challenge however will be to develop tourism and hospitality assets close to these hotels so the benefits of the visitor revenue generated is maximised and extends into the local community in a sustainable manner.

Retail Offering

Although challenged in recent years, Wexford still boast a significant retail offering for domestic and international visitors alike. With a variety of offerings from large shopping centres to small arts and crafts stores the county has a deep and varied retail offering with the key retail centres being Wexford Town, Gorey and Enniscorthy. The quality and diversity of this retail offering should be highlighted in the promotion of Wexford as a tourism destination. Additionally, efforts should be made to support retailers in respective towns to collaborate and deliver an outstanding retail tourism experience, thus creating vital income for the local economy.

Conclusion

Based on the analysis set out it is clear that Wexford, in terms of its product and experience offering, has an extensive range of tourism assets that can be used to motivate and attract more visitors on a domestic and international basis. However, it is likely that most counties in Ireland would be able to undertake similar analysis and reach the same conclusion. It is therefore important that Wexford succeeds in building greater awareness of its offering and that the offering is seen to be unique.

Additionally, with the further development of existing products and experiences, coherent clustering and active marketing, there is significantly potential to drive a growth in visitor numbers and revenue.

Situational Analysis

Part Two

V. Supply and demand overview
VI. Competitive positioning
VII. SWOT
VIII. Conclusion

In this section we review what level of supply is in place and its ability to match demand, whilst also examining Wexford's competitive positioning nationally and in a regional context.

3.5 Supply and Demand Overview

On a national basis Ireland has faced a number of issues of concern in relation to capacity - particularly in tourism hotspots around the country. Accommodation capacity has been an element which authorities have sought to address in the context of Dublin where many visitors tend to base themselves for their visit to Ireland.

These capacity constraints have placed a strategic emphasis on regionality and seasonality. Meaning, ideally visitors would be spread more evenly throughout the country and would be encouraged to visit in the 'shoulder' seasons.

In the Wexford context, many visitor attractions currently have the capacity to welcome more tourists in the years ahead. This however needs to be matched by hotel and other accommodation capacity if the goal is to increase dwell time and overnight stays. Furthermore, this accommodation must represent the 'right' accommodation, meeting the visitor's preference whilst also being priced appropriately.

Accommodation Review

Table 3.5.1 Wexford Hotel Accommodation Capacity

Type	Premises	Rooms	Beds
5*	1	70	149
4*	14	1130	3104
3*	8	294	792
2*	3	49	115
Approved	1	10	23
Hotels Total	27	1553	4183

Source: Fáilte Ireland, Hotel capacity 2018

Wexford has 1500 hotel rooms which is a larger number than its regional counterparts. Notably the county has a higher than average proportion of 4* hotels 48% compared to 36.4% in the south east region and 32.6% in the state.[21]

Table 3.5.2 Other Accommodation Capacity

Type	Premises	Rooms	Beds
Guesthouse	3	34	86
B&B	34	149	363
Self-Catering	130		605
Caravan/ Camping	5	984	5616
Marina	1		90
Total	60	1167	6760
Total Accommodation Capacity (Inc. Hotels)		2720	10943

Source: Fáilte Ireland

Stakeholder consultation undertaken indicates that there are capacity concerns in certain parts of the county particularly at peak times. As with other counties in Ireland tour operators indicate difficulty in accessing capacity other than off season. With this in mind the challenge of creating capacity must be considered in the context of not only peak seasons but the full calendar year.

If we look ahead and match predicted growth rates with current capacity, we can assess capacity which may be needed in the future.

Table 3.5.3 Wexford Hotel Accommodation Capacity - 2023 - Projected

Type	Premises	Rooms	Beds
5*	1	70	149
4*	14	1130	3104
3*	8	294	792
2*	3	49	115
Approved	1	10	23
Hotels Total	27	1553	4183
Annual Supply (350 Nights P.A.)		543,550	1,464,050
5.3% (CAGR) Growth 2019 - 2023		740,986	1,995,842
Annual Increase In Rooms Needed To 2023		197,436	
Occupancy 67%		132,282	
Rooms Increase By 2023		378	
Occupancy 88.1%		173,941	
Rooms Increase By 2023		497	
Total Rooms 2023		2,050	

Source: Fáilte Ireland, Genesis analysis

Based on projections a further 500 rooms will be required to meet future demand. This is a key consideration for all key stakeholders. Whilst the strategy and implementation plan that underpins it focuses on growth it is imperative that the county has the means to meet the demand and accommodate people to stay overnight in Wexford, which is the single most important factor in terms of generating revenue and supporting the local economy.

Whilst in truth the market and industry will largely dictate the creation of new capacity, efforts should be made to ensure that the county from a planning perspective, underpinned by strong fundamentals, can create new capacity at pace.

3.6 Competitive Positioning

3.6.2 Tourism in Wexford and Neighbouring Counties 2013 - 2017

County	Overseas Revenue (€m)	Overseas (000)	Domestic Revenue (€m)	Domestic (000)	Overseas/ Domestic (Revenue based)
Wexford	300	1160	779	3094	1/ 2.5
Waterford	318	1271	309	1537	1/1
Kilkenny	219	1331	168	1305	1.3/1

Source: Fáilte Ireland regional tourism performance reports 2013- 2017, Genesis analysis

On a national basis Wexford ranks as the fifth most popular county for domestic tourism. In revenue terms Wexford derives twice as much from domestic than overseas visitors and therefore it is important to pay attention to domestic visitors when developing experiences whilst also seeking to increase the proportion of overseas visitors.

Whilst domestic tourism is forecast to expand marginally (2% per annum: Fáilte Ireland) in the coming years, there has been an uplift in Irish people travelling overseas for their holidays. There was a 14% increase in overseas travel from 2015 - 2017[22]. As the economy is forecast to expand this trend is likely to continue.

Competition for domestic visitors is also intensifying. The depth and range of products and experiences on offer, particularly related to outdoor experiences and food offerings are vast and growing. Many counties throughout the country are placing a higher emphasis on tourism with a resulting improvement in their offering.

For example, Tourism Northern Ireland have placed a renewed focus on ROI consumers and the new Ireland's Hidden Heartlands (midlands) proposition will result in a broader choice for the consumer and potentially a further competitor for Wexford. In relation to the key family segment, Center Parcs are due to open their first park in Ireland "Longford Forest" in summer 2019. Whilst this is an unknown quantity in the Irish context, the lead up to and the first year of trade is bound to result in much hype and publicity. With a forecast capacity on the Longford site of 1,800 (which exceeds Wexford's Hotel capacity of 1,500) and occupancy rates of 97% in their sites generally this may have the potential to attract families that may traditionally holiday in Wexford.

Fáilte Ireland statistics for 2017 indicate Kilkenny achieved 35% more international visitors and Waterford 10% more international visitors than Wexford. Additionally, in recent years Waterford has increased revenue from overseas visitors by almost €20 million (from 2013 - 2017). Based on this analysis one can deduce that international tourists are increasingly visiting the region, however Wexford is not getting their potential share of these visitors. Addressing this fact represents a key opportunity to drive growth of tourism in the county.

[22] http://www.cso.ie/en/releasesandpublications/er/ot/overseastraveloctober-december2017/

3.7 SWOT

An analysis of sectoral and geographical characteristics, capacity and product and experiences drives an assessment of strengths, weaknesses, opportunities and threats in the Wexford tourism context.

The following table outlines a high-level SWOT analysis. This analysis has been used to inform and guide the strategy for growth which is detailed in the following chapters.

KEY STRENGTHS	KEY WEAKNESSES
• Strong domestic market and tourism friendly culture • Depth and breadth of distinctive tourism assets (regionally distributed) • Heritage, natural and cultural assets including Norman and Viking heritage, county coastline, Hook Peninsula and Wexford Opera Festival • Industry willingness to buy in to Ireland's Ancient East and potential for county to be lead light within Ireland's Ancient East strong and improving food and drink offering, culture and credentials	• Reliance on domestic and GB as source markets • Quality and consistency of industry collaboration • Lack of shared vision and sense of common cause • Lack of engagement in and sustained focus on international markets • Limited hotel capacity and availability (at peak and especially for international tour groups) • Year-round experiences (lack of shoulder season propositions) • Limited interpretation and linguistic capabilities (on site)
KEY OPPORTUNITIES	**KEY THREATS**
• Development and expansion of international visitor base • Position Wexford as a 'must visit' element of the Ireland's Ancient East Experience • Develop greater collaboration at agency, industry and community levels (enabling product/experience development and clustering opportunities e.g. Wexfordia initiative, Norman Way, agri-tourism and food, greenways, coastal offering etc.) to be realised • Broaden seasonal and regional relevance of county offering • Enhance food and drink offering and credentials • Deliver outstanding cross-county tourism propositions (with neighbouring counties)	• Industry fragmentation lack of commitment from key partner agencies to shared plan and investment • Lack of capital investment • Limited private industry investment • Increased competition for domestic tourists • Brexit – decline in key market (GB) • Planning constraints particularly regarding coastal development • Lack of investment in and focus on international markets • Increasing cost base / weak labour pool • Decline in value for money perceptions.

3.8 Conclusion:

Wexford is well-placed geographically to deliver and be a lead element of the Ireland's Ancient East offering (particularly in relation to international visitors already touring the region and neighbouring counties). Visitors are seeking experiences and have an interest in visiting cultural sites, museums, castles, heritage sites and scenic sites, all of which are available in Wexford however many are at an earlier stage in their development lifecycle. Therefore, an emphasis should be placed on investment in these experiences, ensuring they are of high quality, and clustered for impact.

Furthermore, there is a mix of geographical qualities and heritage sites that are well matched with what overseas visitors are seeking. From rugged and wild Hook Head to an array of Blue Flag beaches, busy towns, walking and cycling trails and heritage and cultural offerings. There is a real opportunity to package and bundle these elements in such a way as Wexford is seen as a unique and comprehensive experience-led destination.

In terms of accommodation capacity, currently there is a high occupancy. Given the ambition for growth there will be a necessity to add accommodation stock to Wexford's current offering.

However, Wexford is more heavily reliant on the domestic market than regional counties and also not getting its fair share of international visitors. Domestic tourism shows a slower growth rate in the coming years and therefore the opportunity to attract overseas visitors should be maximised in the context of the Ireland's Ancient East offering.

4. Vision and Ambition

THE VISION FOR WEXFORD TOURISM

4.1 Working Towards a Vision - Understanding the Benefits of Tourism to Wexford

Tourism is a unique sector in that it has the capacity to have a positive impact in a multiplicity of ways.

From an economic perspective the most obvious upside for Wexford is that the sector provides significant employment. Nationally it is estimated that tourism directly employs 230,000[23] people within 18,000 enterprises, representing over eight percent of economy-wide employment. Furthermore, it is estimated by Fáilte Ireland that every €1mn of tourist expenditure helps to support 27 tourism jobs and every 1,000 additional overseas tourists supports 19 jobs in the tourism industry.

Whilst the majority of employment is driven by hotels, restaurants, pubs and visitor attractions, the **employment** profile of the sector is broad and diverse, with events, galleries and museums, heritage, adventure and marine tourism creating employment for people throughout the county with differing skills and abilities.[24]

Within the context of tourism's contribution to economic development, a job growth scenario for Wexford has been developed. In this scenario it is estimated that should Wexford achieve its growth targets 1,048 jobs - equivalent to a large multinational establishing in the county, would be generated. This in turn would support job creation in the supplier community and eco-system surrounding tourism. This growth is based on an increase of 3.5 percent per annum in employment and this is aligned with employment growth driven by Ireland's Ancient East estimated by Fáilte Ireland.

4.1.1 Wexford Jobs Growth Prediction 2019 - 2023

Using Fáilte Ireland's formula it is estimated that 5,589 people are currently employed by the tourism sector in the county (2018 estimate). Applying an employment growth rate of 3.5 percent per annum growth (as per Ireland's Ancient East projections) results in the creation of 1,048 jobs within the county.

The potential to create over 1,000 new jobs within the county represents a major prize, both economically and socially, helping to build the case for investment in the sector and collaboration across the local tourism community.

In addition to creating employment, tourism in Wexford allows towns and communities to **diversify sources of income**. Additionally, tourism businesses and employers tend to source goods and products locally, giving a boost to local industry, enabling much of the revenue generated by tourism to be retained within the local economy.

[23] *ITIC An Industry Strategy for Growth to 2025*
[24] *http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3_Research_Insights/5_International_Tourism_Trends/Failte-Ireland-s-Tourism-Facts-2017-preliminary.pdf?ext=.pdf; page 3*

The development of Wexford's tourism offering will necessitate the establishment of several public and private projects focused on **improving and creating local infrastructure, facilities and amenities**. Whilst the development of better infrastructure and facilities may be primarily focused on attracting more visitors, they are also of real long-term benefits to local residents and the county generally, with better infrastructure benefitting all and new/improved facilities and amenities being available to and enjoyed by local residents and communities.

Lastly, but possibly most importantly, the development and success of Wexford's tourism offering will need to be underpinned by collaboration across a broad range of public and private stakeholders. This collaboration will **bring people, communities, businesses, representative groups and the local authority together with the common purpose** of elevating and improving Wexford's tourism offering in a sustainable manner, benefitting one and all and improving the quality of life in the county.

The Vision for Tourism in Wexford

Set against this background and appreciating the various ways that tourism benefits the Wexford vision is:

To become one of Ireland's most compelling tourism destinations and in doing so improve the quality of life of people and communities throughout the county.

Creating employment opportunities

Bringing people and communities together

Diversifying sources of income to the local economy

Improving and creating local infrastructure, facilities and amenities

4.2 Scale of Ambition

Whilst the vision should be enduring and continually drive tourism forward in Wexford, it is also critical that key targets and goals are set over the life of this strategy. Progress against these key targets should be measured on a continual basis to assess the impact of the implementation of the strategy and also support its iteration as and when required.

The growth targets that have been set are set out as follows:

4.2 Growth targets 2019 - 2023

	2018 Estimated	2023	Growth over period of the strategy
Revenue (€m)	Domestic €146 International €65 Total €221.7	Domestic €173 International €77 Total €250	Domestic +18.7% International +18.7% Total +18.7%
Visitors (000)	Domestic 679 International 248 Total 927	Domestic 746 International €77 Total 1,039	Domestic +9.8% International +18% Total +12%
Employment	5,967 Estimate based on Fáilte Ireland employment formula	+783 new jobs created	Total 6,750

Source: Fáilte Ireland; IAE growth rates

Whilst the targets that have been set are ambitious, assuming stable macro conditions, they are also deliverable. Notably the revenue target growth rate of 18.7 percent over the period of the strategy (3.5 percent per annum) has been aligned with the growth target for Ireland's Ancient East set by Fáilte Ireland. As previously stated, in the tourism growth strategy for Wexford the development and success of the Ireland's Ancient East brand will be a key factor. Set against this background, growth in line with Ireland's Ancient East targets have been set.

Whilst visitor numbers may be the key core metric that is targeted and evaluated, the key outputs associated with a growth in the number of domestic and international visitors to Wexford, namely revenue and employment, must also be focused on. Based on the growth ambition set it is projected that the growth of the tourism sector will generate a total of 783 new jobs by 2023 and deliver €250 million in income to the local economy. The underlying benefit of reaching these targets supports the stated vision, with the key outcome being the improvement of the quality of life of people and communities throughout the county.

4.3 Key Strategic Opportunities and Challenges

In consultation associated with the development of the strategy a broad range of future strategic opportunities and challenges emerged. Whilst it is vital to identify all potential future opportunities and challenges, it is even more important to prioritise them. Set out below is an overview of the key opportunities, that if seized, and key challenges, that if addressed, have the potential to unlock accelerated growth in tourism in Wexford. These in turn have a direct influence on the strategy and action plan to drive growth in the future.

KEY OPPORTUNITIES
Develop and expand the international visitor base. Supporting the industry to deliver the best experiences, increasing the visibility, relevance and bookability in key overseas markets, whilst also building traction with overseas trade.
Broaden the seasonal and regional relevance and appeal of Wexford as a holiday destination.
Position Wexford as one of the must-see elements of Ireland's Ancient East, bringing alive key themes such as the Normans and Vikings (creating clusters of best-in-class visitor experiences that will slow the visitor down and increase dwell time).
Develop greater collaboration at agency, industry and community level (in order to deliver connected and compelling visitor communications and experiences).
Further enhance Wexford's food and drink offering and credentials - making the county a culinary destination of note.
Strengthen the county's digital footprint so it acts as a key point of competitive advantage.
Envisage, define and create an entirely new and original iconic attraction of scale that can be owned by Wexford.
Collaborate with neighbouring counties to deliver outstanding cross-county tourism propositions that all parties benefit from.
Harness one of the county's most compelling natural assets, its coastline, presenting it as a contemporary multi-faceted experience.

KEY CHALLENGES

Reduce the reliance on the domestic and GB markets, broadening the range of source markets.

Distinguish Wexford as a preferred destination in an increasingly competitive market for domestic and international visitors.

Build in a timely manner (suitable - format, quality and price) accommodation to keep up with growth levels projected.

Attract, develop and retain appropriate talent within the tourism sector on a sustained basis.

Extend and broaden the regional and seasonal distribution of visitor numbers and revenue across the county.

Establish and maintain the optimised coordination and implementation structure across the broad range of stakeholders involved in the sector at a county and agency level.

Enhance and maintain the county's value for money credentials generally and versus competitors.

Whilst there are a broad range of opportunities and challenges that the strategy needs to address, there is also a need to operate with a sense of clear prioritisation. With this in mind the development of the strategy for growth has sought to major on opportunities and challenges that are addressable and, when addressed, will have a significant positive impact in tourism within the county.

These priority opportunities and challenges and how they relate to one another are outlined below.

KEY OPPORTUNITY	KEY CHALLENGE
Develop and expand the international visitor base.	Reduce the reliance on the domestic and GB markets.
Develop greater collaboration at agency, industry and community level.	Establish and maintain the optimised coordination and implementation structure across the broad range of stakeholders.
Positioning Wexford as one of the must-see elements of Ireland's Ancient East.	Distinguishing Wexford as a preferred destination in an increasingly competitive market for domestic and international visitors.
Broaden the seasonal and regional experience offering - driving the relevance and appeal of Wexford as a holiday destination.	Extend and broaden the regional and seasonal distribution of visitor numbers and revenue across the county.

It is important to note that Wexford is not coming to the growth strategy from a standing start and much good work is already in progress, with a variety of projects and partnerships already in place, e.g. Plan for Greenways with regional local authorities, Plan for Carrigfoyle Adventure Centre with WWETB etc. However, with an enhanced focus and appropriate resources the potential for Wexford to realise the key opportunities and overcome the challenges is much greater.

4.4 The Industry Perspective

The programme of consultation for this strategy involved trade and industry workshops, and a large-scale industry event and a number of qualitative interviews. The following table reflects the ambition and aspirations of industry stakeholders that contributed and the implications for the strategy.

Industry perspectives on future strategy

INDUSTRY WINNING ASPIRATION	CAPABILITIES NECESSARY	IMPLICATIONS FOR THE STRATEGY
• Achieving growth to top-tier tourism county levels. • To be the most collaborative tourism county in Ireland. • Develop and strengthen the brand, internationalising it within Ireland's Ancient East, emphasising key themes such as the Vikings and Normans. • Capitalise on our natural environment and outdoor lifestyle.	• A committed collaborative Industry. • Motivated, knowledgeable and skilled labour pool. • Necessary support staff. • A recognition of the relevance of tourism to every aspect of the county's economy. • Ease of access, high-quality infrastructure. • A range of clusters of compelling attractions. • A new singular iconic attraction. • Strong sales, commercial skills and networks. • Ability to identify consumer needs and insights. • Digital excellence.	• There is an awareness issue in international markets which must be addressed in the context of IAE. • Investment is needed to bring product and experiences to a level where they are distinctive, accessible and bookable. • Supports and collaborative structures are necessary to engage industry and hold them accountable for their role in growing and selling tourism. • Consolidation of domestic and growth of overseas visitors are desired which will require an increase in accommodation capacity.

4.5 Conclusion

As outlined above trade and industry representatives have ambitions for growth. They recognise the importance of the Ireland's Ancient East proposition for the future of tourism in Wexford. Furthermore, they are clear about the need to improve underlying capabilities to enable growth particularly in the areas of sales and commercial skills and identifying consumer needs and insights.

As previously stated, for the strategy to be successful, industry need to be front and centre in its implementation. It would appear that in large part industry within Wexford are on the same page when it comes to defining where the county is at and what it needs to do to grow in the future. The key opportunity is now for industry, with other stakeholders, to come together and make the strategy happen.

Through research, and in particular consultation, with key stakeholders within the county, at an agency level and beyond we have been able to build a clear understanding of both the opportunities and challenges that will face Wexford in its pursuit of growth within the tourism sector. It is with this understanding that a highly focused strategy has been defined. This strategy has not only been constructed to deliver growth but also drive collaboration and cohesion at a local and county level, ultimately supporting Wexford in the pursuit of its vision to become one of Ireland's most compelling tourism destinations and in doing so improve the quality of life of people and communities throughout the county.
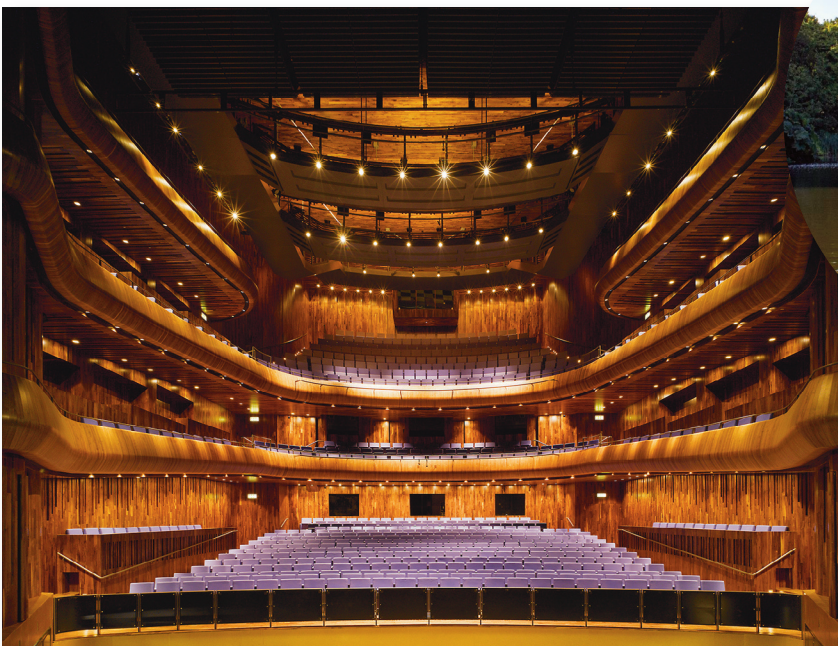
5. Strategy for Growth

5.1 Strategy Framework

The strategy framework identifies the consumers Wexford will focus on to deliver sustainable tourism development and growth across the county. Critically it also sets out the key areas of development that will facilitate and enable this growth. It is to be used as a focal point that will guide decisions, actions and investment across the tourism stakeholder network.

The framework that has been established consists of five key elements. These five elements and their respective strategic goals are summarised as follows.

STRATEGY ELEMENT		STRATEGIC GOAL
A	**TARGET MARKETS AND SEGMENTS**	To diversify the visitor base by growing the volume of US, French and German visitors whilst consolidating share of domestic visitors and volume of GB visitors.
B	**VISITOR EXPERIENCE DEVELOPMENT**	To strengthen, develop and elevate Wexford's range of compelling, unique and must do visitor experiences, creating real standout and competitive differentiation.
C	**CAPACITY BUILDING**	To strengthen the capacity of industry to create and promote experiences that will attract priority segments from key markets.
D	**PARTNERSHIP DEVELOPMENT**	To increase stakeholder and industry collaboration so that enterprises and experiences are developed around a shared vision and ambition.
E	**BRAND AND MARKETING COMMUNICATIONS**	To invest in building understanding, capacity and execution capabilities in marketing and communications to support awareness creation, trial and conversion of target consumers.

A: TARGET MARKET AND SEGMENTS

STRATEGIC GOAL

To diversify the visitor base by growing the volume of US, French and German visitors whilst consolidating share of domestic visitors and volume of GB visitors.

As previously outlined, and in line with key strategic opportunities and challenges that have been defined, the future market and segment focus must support the broader diversification of Wexford's visitor base. Currently the majority of visitors and tourism revenue arises from the domestic and GB markets. The strategy does not envisage a reduction in the number and value of visitors from these markets (although GB may suffer natural decline as a consequence of Brexit), however it foresees greater penetration and value being generated from other overseas markets, with a primary focus on the US and French markets and a secondary focus on the German market.

THE DOMESTIC MARKET

With regard to the domestic market the focus will be on consolidating the key family market whose core motivation is to spend quality time together and grow as a family. They make up approximately one quarter of the domestic market and are the largest domestic segment. This segment is largely made up of parents in their 30s and 40s with children generally under 10 years of age.

They are motivated by a variety of things to see and do, making the most of their opportunity to really 'be' with their children. They enjoy seeing them experience the same simple things they did as children. They generally research holidays six months in advance and rely heavily on hotel/ accommodation websites, review sites, social media and personal recommendations. They are also very likely to book activities in advance.

Wexford already performs well with this segment of the market and there is a good alignment between what the county has to offer this segment and the types of breaks and experiences they are seeking. Wexford's 'Sunny South East' offering is well aligned with the needs and wants of this segment; however domestic competition is intensifying and therefore Wexford must continue to innovate and develop its offering in order to continue to win with this key segment.

The secondary target domestic segment is made up of older couples who are motivated by getting away, relaxing with their partner, having a romantic break and travelling without much planning effort. They take the highest number of domestic trips of any Irish segment. The majority of the Irish couples who like to travel segment are aged 45-64 and they often book trips spontaneously (1-2 weeks before travel). They also tend to seek out hotel accommodation.

By targeting these two segments Wexford will be focussing on a sizeable proportion of the domestic market. They also represent segments that Wexford, based on its current and potential future tourism offering, can win.

INTERNATIONAL SEGMENTS

From an international perspective the primary focus will be the Culturally Curious segment. This is aligned with the focus of Fáilte Ireland and the Ireland's Ancient East brand.

This segment represents a sizeable population cohort in Ireland's core overseas target markets. They over-index on revenue contribution, are more likely to explore different regions and visit the island of Ireland outside of the peak seasons. In short, they are a segment of scale for which much of Wexford's tourism offering is of relevance and appeal. Therefore, a sustained focus on the Culturally Curious is a strategically sound option.

The secondary focus will be the Great Escapers segment. Wexford is well positioned to maximise visitor numbers from this segment given that they are motivated by coastal, walking and outdoor offerings with peace and quiet and an element of 'getting away from it all' being valued by them.

Additionally, the effective bundling and programming of offerings that are less season dependent can be used to motivate this segment to visit. In terms of driving growth, unlocking the potential of this segment will have a significant impact on performance particularly in the high-spending German, French and North American markets.

Note: A summary of the key target segments and markets is contained in the appendix of this document.

KEY MARKETS

In relation to key segments the highest potential for growth lies within the core markets of North America, France, Germany and potentially Australia/ New Zealand. The current Wexford offering and its envisaged further development is aligned with their motivations and they are the markets which Tourism Ireland are already extensively targeting. This provides a basis, assuming good collaboration with Tourism Ireland, Fáilte Ireland and key local stakeholders, to develop the awareness, knowledge and consideration of Wexford as a key destination for those planning to visit Ireland.

Tourism Ireland is also monitoring developments in potential Asian markets particularly China with a view to incremental market entry.

Any effort to target the emerging Asian market will involve generating insights and understanding into product, experience, cultural and accommodation needs. The feasibility and implications of attracting Asian visitors could bring considerable costs to industry, potentially necessitating a change in their offering and business model from one tailored to the US market to one with a new emphasis on China.

However, given the potential market size, growth in the middle class and prosperity in China and the expansion in predicted travel in the coming years these markets should be monitored with a view to considering them in the future.

B: VISITOR EXPERIENCE DEVELOPMENT

STRATEGIC GOAL

To strengthen, develop and elevate Wexford's range of compelling, unique and must-do visitor experiences, creating real standout and competitive differentiation.

At the heart of the strategy, and indeed Wexford's capacity to win versus competitors, is the quality and accessibility of visitor experiences.

Thankfully Wexford has a long tradition of being a 'tourism county' with a broad and rich offering in terms of the natural environment, culture, heritage and hospitality. However, the degree to which Wexford is famous for offering truly differentiated and compelling iconic visitor experiences is limited on both a national and international basis.

Domestic audiences have a long-held view of the offering in Wexford. The sunny South East 'product' is well-known; however, other product offerings from the county have tended to provide less cut through with consumers.

Furthermore, Wexford as a destination is gaining little traction in international markets, with the exception of GB. This is borne out in the visitor numbers and how they compare relative to neighbouring counties and other counties that have a more mature international visitor offering such as Kerry, Clare or Galway.

Whilst improved marketing communications and the development of the Ireland's Ancient East brand will support growth domestically and internationally these two factors need to be substantiated through the development and provision of visitor experiences that will motivate, surprise and delight key target segments, both on a domestic and international basis.

Set against this background, a framework for visitor experience development has been defined within the strategy. This framework is future focused but also deliberately seeks to build upon key current strengths in terms of experiences, whilst also being mindful of projects that are already underway or planned. The development framework also seeks to ensure that experience development is appropriately distributed across the county rather than a handful of tourism hotspots. Furthermore, a key focus of experience development will be extending the tourism season, creating year-round sustainable tourism businesses that make a key contribution to employment and the local economy.

The visitor experience development framework is summarised as follows:

1: Establish the Most Compelling Clustered Experience of Ireland's Ancient East

Developing the jewel in the crown of Ireland's Ancient East. Centred on a clustered experience encompassing the Hook Peninsula, Loftus Hall, Dunbrody Famine Ship, the Irish National Heritage Park, Tintern Abbey, JFK Homestead and Arboretum

2: Develop Wexford Town's Profile As a Unique and Vibrant Maritime Town

Centred on Wexford Town's Viking heritage in particular, its long and rich seafaring history, unique natural maritime environment, water sports, festival and food offering and, in time, the Trinity Wharf Development

3: Establish Wexford's Contemporary Coastal Experience

Focused on coastal towns from Gorey to Fethard, and encompassing key Blue and Greenways, developing and clustering experiences that will rejuvenate Wexford's 'sunny South East' proposition and position it alongside leading coastal experiences such as Cornwall in the UK

4: Culture and Heritage Experience Development

The development and clustering of unique and diverse cultural and heritage experiences (including the National Heritage Park, Enniscorthy, Ferns Castle, Wells House, Johnstown Castle and The Norman Way), brought to life through storytelling and animation

5: Create a New and Unique and Original Iconic Experience

The exploration and development of a completely new and unique visitor experience (longer term / horizon objective)

Note: All above efforts will be linked to and seek to underpin the Ireland's Ancient East brand and the development of Wexford's festival and food offering, whilst also supporting season extension

1: Establish the most compelling clustered experience of Ireland's Ancient East

Ireland's Ancient East targets visitors that are well-travelled Culturally Curious people. They are looking for authentic, high-quality experiences that will be memorable and enriching. They want to be active participants, not passive spectators and consumers.They want to learn from the places they visit, and interact and connect with the people and culture. They want experiences that are special and 'only here'; experiences that create memories they can share with friends, family and social networks.

These sorts of experiences will mean they get the most out of their visit to Ireland's Ancient East - staying longer, spending more, and having a satisfying time so that they recommend the region to others and want to come back again.

Therefore, a series of visitor experience development plans for each of the Ireland's Ancient East signature experience stories is being developed. Because the visitor experience is owned, delivered and funded by a huge range of businesses and organisations, these are shared plans – with public and private sectors working together to agree a common direction and priorities.

Visitor experience development plans focus on creating experiences that:
1. **Are significant enough to attract new international visitors**
2. **Give international visitors what they want in terms of experiences and quality**
3. **Extend the season, and the length of stay, so that tourism businesses are sustainable**
4. **Help to strengthen and deliver the signature story themes and wider Ireland's Ancient East promise**
5. **Join up experiences to create a critical mass of things to see and do**
6. **Engage businesses to grow and become more profitable by using their own unique stories**

Wexford is well positioned to be a core and leading 'ingredient' in the Ireland's Ancient East brand. The Ireland's Ancient East proposition offers holiday makers short breaks in places filled with quirky and memorable experiences, being described as 'a region of legends and stories from ancient times to modern day – a place brimming with culture, attractions, festivals and fun'.

The narrative that underpins Ireland's Ancient East in many ways plays to the strengths and diversity of Wexford's product and experience offering. However, as of yet, its potential has not been fully realised and nor has the potential of Wexford in the context of Ireland's Ancient East. In fact, it is fair to say that the Ireland's Ancient East brand is still in a formative phase. Given it is forming, developing its awareness, knowledge domestically and internationally and also building evidence through clustered experiences, there is now a prime opportunity for Wexford to position itself as a leading light of the brand. However, in doing this, it is important that the initial focus is relatively singular – with the most compelling and relevant experiences that have the capacity to create consumer cut through being given primacy.

With this in mind the key focus should be on clustering the experience offering that encompasses key attractions such as the Hook Peninsula, the Irish National Heritage Park, Loftus Hall, Dunbrody Famine Ship and other attractions of note such as Tintern Abbey, the JFK Homestead and Arboretum as well as dialling up attractions associated with Viking history and heritage.

Within this cluster of proximate experiences lies a range of memorable and diverse ones which will appeal to both priority domestic and, in particular, international segments. Development of these experiences will be a key driver in unlocking the economic potential of tourism in Wexford.

There are number of projects and plans in development that will strengthen the appeal and salience of this cluster. Such projects include the development of a Norman Quarter, St. Mary's Abbey and medieval walking trails in New Ross. There are plans being considered to create a new visitor centre in New Ross that will showcase the Norman story of Wexford including the Ros Tapestry. It is anticipated that the planned visitor centre will also detail the emigrant story, emphasising the link with JFK in an Ellis Island-like visitor experience.

Additionally, two potential new ticketed experiences at Hook are being explored. These would centre on the 'Story of a Thousand Shipwrecks' and another centred around the location and geology of the area by delivering a dynamic animated visitor experience.

It is important to note that a number of these experiences and destinations already feature within Ireland's Ancient East itineraries that are already in place. However, with further investment, development and coordination the prominence of the cluster can be heightened significantly whilst also increasing visitor capacity. In particular attention will need to be given to developing enhanced infrastructure and marine tourism facilities on the Hook Peninsula.

Whilst this initiative will strengthen Wexford's position in the context of Ireland's Ancient East it will also improve the offering of the Wexford tourism brand, leading to touring visitors spending more time in Wexford, overnighting in the county and spending more money. However, the work associated with the development of this cluster is only partially associated with communications and marketing and critically it will call for fundamental product and experience development.

With this in mind, the coordinated effort of key stakeholders at a county and agency level will be critical in the cluster being properly defined, with the key experiences being appropriately developed and connected.

2: Develop Wexford Town's profile as a unique and vibrant maritime town

OVERVIEW

For many, Wexford Town, at least on a domestic basis, is recognised as being a vibrant and diverse town. However, it is not necessarily lauded or recognised as being a leading tourism destination. Other towns and cities enjoy profiles that through singular features position them as compelling tourism destinations, e.g. Kilkenny being recognised as a medieval city, Galway for arts and Kinsale for food. However, Wexford Town is not famed for anything in particular beyond the Opera Festival, which is now well established and gaining international traction and profile.

Wexford Town is now (as of 2019) a Fáilte Ireland designated 'Destination Town' (under Ireland's Ancient East) and there is a real possibility for the profile of the town to be further enhanced. In order to develop further Wexford Town's appeal and consideration as a leading tourism destination the town must strategically develop its profile with a particular perception and tourism positioning in mind. It is recommended that this positioning lead to the town as being perceived as being a unique and vibrant maritime town. In particular, the rich Viking heritage of Wexford Town should be focused on, it is this element that offers the potential to distinguish and differentiate itself relative to other maritime towns in Ireland's Ancient East and beyond.

The definition of maritime is multi-faceted and importantly plays to Wexford Town's current and future strengths in terms of products and experiences. An overview of the key dimensions that converge to constitute a maritime town are illustrated below.

Natural Environment

Innovation

Food Offering

Tourism Ingredients of a Maritime town

(Viking) History and Heritage

Festivals

Water Based Activities

Based on an analysis of the current range of products and experiences offered by Wexford Town and the surrounding areas, and those projected to come on stream in the future, it is apparent that the town has all the ingredients to claim and benefit from the proposed positioning. These elements are summarised as follows:

Natural Environment

As a coastal town Wexford and its environs boast a rich and plentiful natural environment. From the Slaney Estuary, to the harbour and access to the sea, to the nearby Wexford Wildfowl Reserve, Raven Point Wood, the Blue Flag beaches of Curracloe and Ballinesker and the Green Coast Award-winning Culleton's Gap beach there is a rich and diverse natural environment that can be used to attract and delight visitors, both domestic and international.

Food

The food credentials and offering in Wexford Town have been developing apace. The town has a breadth of quality food and drink offerings, a great farmers' market, food speciality stores, gastropubs cafés, and restaurants. As one would expect the seafood offering is on particular note with fresh fish being landed daily at the nearby Kilmore Quay and restaurants like La Cote receiving acclaim.

Festivals

Wexford's long and rich seafaring history is already celebrated by the annual Maritime Festival held in the town every June. The festival has been going since 2012 when it was established to honour the memory of Wexford local Commodore John Barry, famously known as the 'Father of the American Navy'. The festival includes a range of maritime activities, children's events, entertainment and food. In the positioning of Wexford as a vibrant maritime town the evolution and development of this festival represents an opportunity. In addition to the town's maritime festival consideration should be given to seeking to host Seafest, Ireland's national maritime festival with a view to bringing the spotlight on Wexford. In addition to the annual Maritime Festival there is potential to develop the Spiegeltent Festival, one of the biggest and most successful multi-genre festivals in Ireland. This festival in particular supports seasonal extension of tourism as it takes place in the month of October.

Water-Based Activities

As a maritime town Wexford Town and in particular the nearby Blue Flag Curracloe Beach offers a range of water-based activities – from swimming, sailing, kayaking, canoeing to stand up paddle boarding and open water fishing. These should be expanded over time to include the utilisation of Wexford Town Quays for water-based activities.

Viking History and Heritage

As previously referenced Wexford has a long and rich seafaring history, with a particularly unique Viking story to tell. From ancient - the Vikings, to more recent - John Barry, the 'Father of the American Navy' the county and town has a rich maritime history and heritage. In particular there is an opportunity to leverage the Viking connection, a proposition currently being developed by Fáilte Ireland as part of the Ireland's Ancient East brand. From a historical perspective Wexford Town was a Viking base and ruins remain to this day. The Irish National Heritage Park also represents a key tourism asset in terms of the Viking connection and the connection between the town itself and the Park offers significant potential. Notably, the Park has also been leading the way on creating a Viking Festival which is due to be rolled out in 2019. Set against this background there is a real opportunity to develop a built 'Viking' experience that can serve to distinguish Wexford Town further and attract both domestic and international visitors.

Innovation

As with all great tourism destinations the offer is continually developed and refreshed. Based on projects currently underway, planned or proposed it is apparent that Wexford Town's tourism offering will continue to expand and develop into the future. Most notably, if the proposed landmark development of Trinity Wharf is progressed, the town can look forward to offering new hotel accommodation and the opening of a major multi-use cultural and events centre. In addition, the plan includes the 61-berth marina and a new boardwalk linking Trinity Wharf to Paul Quay and the Crescent, thus strengthening Wexford Town's maritime credentials further.

There is also the potential to consider the development of a distinctive new product, e.g. the development of an aquarium of scale, in order to establish unique tourism assets for Wexford Town.

Developing Wexford Town's Cultural Offering

In conjunction with the development of the town in terms of a holistic maritime experience there is also a major opportunity to develop further the town's established cultural reputation built on the Wexford Opera Festival.

This will require the improved programming of culture related events on a year-round basis and maximising the opera festivals reputation in international markets to increase visitation. Additionally, consideration should be given to the use of public assets and significant buildings in the town to host operatic events year round.

Programming indoor cultural events year round will maximise the strong reputation of the Opera Festival. Other cultural elements built around the new developments and civic spaces will help in building a year-round cultural destination.

3: Establish Wexford's Contemporary Coastal Experience

The coastline of Wexford is what the county is most famed for from a domestic tourism perspective. The county has managed and benefited from using its coast as a key draw to motivate consumers to visit Wexford, with towns from Gorey, Courtown to Kilmore Quay recognised as leading seaside destinations. However, analysis undertaken as part of the strategy development process indicates that the perception of Wexford's coastal offering, although positively, is considered traditional. With this in mind there is a significant opportunity to rejuvenate the positioning of Wexford's coastal holiday experience offering, making it more contemporary and holistic.

This repositioning will involve integrating and promoting the best that Wexford's coastline has to offer in a renewed and contemporary way, drawing on a range of key dimensions of the visitor experience. Cornwall in the UK represents a good case study and model for the development of the coastal proposition from Wexford.

As a destination Cornwall draws on its natural environment, flora and fauna, wildlife, history and heritage, food culture, water sports, beach life, culture and the arts to attract both domestic and international visitors (with a notable number of Irish visitors). Sector investment has transformed Cornwall from a high volume, low value mass market to a higher value multi-niche market that is far less seasonal. Cornwall is ranked number one in the UK for visitor satisfaction, brand ranking, repeat business and loyalty. As a destination it leveraged its strengths of landscape, beaches, heritage and culture to build distinctiveness. In their journey Cornwall focused on harnessing its assets, relentlessly improving quality in the key areas of outdoor leisure, food, drink and events whilst also getting the basics right in terms of accommodation, public realm, visitor services and facilities.

Building on Wexford's coastal towns and villages, beachfront accommodation, increasingly developed blue and greenways, coastal drives and walks (such as the Sli Carman Coastal Walks), water and land-based sports activities, range of islands reachable on day trips, nature and wildlife reserves, food and drink offering and culture the renewed proposition should be developed and promoted.

It is also however important to note that whilst Wexford's coastal offering should be developed and promoted so that a wide range of destinations, regions and communities benefit. It will also be important to develop a number of leading lights within the experience offering (similar to how Cornwall champions St. Ives and Penzance), with Courtown, Curracloe, Rosslare, Kilmore Quay and the Hook Peninsula receiving particular focus.

Additionally, North Wexford's sea and mountain offering should be harnessed and leveraged. North Wexford is characterised by a strong rural environment, with the breath-taking parkland of Mount Leinster and gently rolling farmed landscapes over most of the area, the Blackstairs Mountains, Wicklow Foothills, River Slaney, a number of Blue Flag beaches and a variety of superb sandy beaches along its coastline. North Wexford has a unique location in the county with its relatively close proximity to Dublin and its potential should be developed.

4: Culture and Heritage Experience Development

As previously referenced the depth and richness of Wexford's culture and heritage offering is a unique and differentiating aspect of the county's tourism proposition (with the Norman theme a particular point of interest and potential differentiation). It is also a key pillar of Ireland's Ancient East brand and a key basis upon which visitors, particularly international visitors, can be attracted to the county and encouraged to spend a number of days and nights in Wexford.

It is imperative that the development of the culture and heritage experience offering has a primary focus. With this in mind, and in an effort to complement and connect with the 'establishment of the most compelling clustered experience of Ireland's Ancient East' initiative previously outlined, it is recommended that the development and clustering of unique and diverse cultural and heritage experiences focuses on Enniscorthy, Ferns Castle, Wells House and the developing Norman Way.

Within this cluster lies a range of sites and experiences that are unique and diverse. It is also noted that there are significant plans for development in place. Enniscorthy Town is set to undergo a significant regeneration project with Enniscorthy Castle set to become the centre piece of the town. The overall ambition is to create a compelling motivation to visit Enniscorthy and to develop a world-class visitor experience. Comparative studies with other Irish tourist hubs are currently being carried out. The project will then move forward to concept design, at which point funding from Fáilte Ireland will be sought.

The nearby Vinegar Hill, with its unique 1798 battle re-enactment and the National 1798 Rebellion Centre, present historic and archaeological gems that can be further developed and promoted. Ferns and Ferns Castle has a depth of history and attractions relating to Christian/Gaelic Kingship and Norman heritage and consideration should be given to its inclusion in the Norman Way. Johnstown House and Wells House and Gardens, are continuing to emerge as compelling tourism offerings for young and old, not only within Wexford but nationally.

Works related to a €7.5 million investment in Johnstown Castle, in association with Teagasc and The Irish Heritage Trust, is underway which will enable conservation and upgrading of the building, opening the castle to the public for the first time and facilitating a new visitor centre, café and shop. Johnstown has a rich historical narrative surrounding it with Anglo-Norman, Cromwellian and 1798 connections to the castle which lend themselves to forming an important element of the culture and heritage experience in the county and the castle and conquests signature stories of Ireland's Ancient East.

Lastly 'The Norman Way' part of Wexford Trails, is being established to enable visitors to discover authentic medieval sites, helping people to understand the Norman way of life. Critically, the Norman Way has the potential to be the historic spine that links New Ross with the many attractions on the Hook Peninsula, thus creating an offering that can disperse tourists more broadly through the county. In many instances the story of the Norman Way is narrated by the locals who live near the various sites. This will enable visitors to not only connect with the history but also the local people of Wexford.

In spite of the many culture and heritage experiences that are available in Wexford it must also be noted that equivalent experiences are available in many parts of Ireland and Wexford must seek to deliver them in a unique and engaging way to stand out from the crowd. With this in mind it is recommended that Wexford's culture and heritage offering is brought to life through storytelling and animation. This will involve engaging with local storytellers, as is often the case with the Norman Way and other attractions such as the Dunbrody Famine Ship, the Kennedy Homestead etc, and investing in animated interpretation facilities so that the experiences can be brought to life in an accessible and compelling way.

5: Create a new and unique and original iconic experience

Lastly, consistently through the consultation process with key stakeholders there was a stated aspiration that Wexford would think expansively, innovatively and with imagination when considering developing its tourism offering. With this aspiration in mind it is recommended that a dedicated project with the objective of identifying and single or range of potential iconic experiences is undertaken.

Such a project would seek to 'think big' about the creation of a new iconic tourism experience for Wexford. It would be required to develop ideas that could be uniquely owned by Wexford. Some examples of the types of things that could be considered are detailed below. Note these are initial ideas and do not represent recommendations.

Idea 1 - The Artemis Fowl Experience

Artemis Fowl is a series of eight science fiction fantasy novels written by Wexford author Eoin Colfer, featuring the criminal mastermind Artemis Fowl II. The series has received positive critical reception and generated huge sales. It has also originated graphic novel adaptations. The series is currently in the process of being adapted into a film by Disney (being directed by Kenneth Branagh). It is likely that Colfer and his work will, as a consequence of the film adaptation, become increasingly visible on an international scale. Given these developments and the connection to Wexford it may be possible for a new tourism experience, rooted in popular contemporary culture, to be developed. It is worth noting that Northern Ireland has been hugely successful in developing the Game of Thrones tourism offering as a consequence of much of the filming taking place there.

Idea 2 - A unique architecture and design experience

Eileen Gray, Enniscorthy native, was a renowned architect and furniture designer. She is recognised as a pioneer of the Modern Movement in architecture. She is most famed for her furniture design, with a chair designed by her selling for €22 million in 2009. Additionally, she designed a villa in France (E1027), now designated a French National Cultural Monument, that was viewed as being a breakthrough that integrated architecture, use of light and decoration.

Building on the legacy of Gray, Wexford could seek to develop a unique built architectural and design experience that focused on architecture, light and design. This could be in a unique building that could serve as environment for workshops, exhibitions and seminars, essentially creating a design mecca.

Idea 3 - A Unique Natural Environment Experience

This idea centres on the development of the tourism offering of the Wexford Sloblands and Wexford Wildfowl Reserve. This unique natural environment is internationally renowned for its wintering flock of 10,000 greenland white-fronted geese (approximately one third of the world population). With numerous tourism projects globally seeking to connect culture and nature, biospheres etc, there may be an opportunity to bring the Wexford Wildfowl Reserve and Sloblands experience to more visitors without compromising the environment and wildlife.

As a reference point for this idea the Dublin Bay Biosphere and planned Unesco Discovery Centre should be examined. It is envisaged that this potential initiative would be explored in the custodians of this area – the national parks and Wildlife Service and Birdwatch Ireland.

Idea 4 - Entertainment Experience Development Joint Venture

There are a number of tourist attraction development companies that are continually seeking sites that they can develop. One such example is Merlin Entertainments, that own and manage brands such as Alton Towers, LegoLand, SeaLife and The Dungeons. It could be possible to enter into a joint venture with one such company with the objective of establishing a completely new family tourism experience in Wexford, e.g. the establishment of an aquarium of scale in Wexford Town.

Sports and Sporting Events

In addition to the above ideas there is an opportunity to build the profile and appeal of Wexford as a destination that is renowned for sport and sporting events. Wexford offers a variety of sports from the traditional such as Gaelic games, soccer, athletics, horse racing, greyhound racing, rugby cycling and golf, to the more niche – angling, hang gliding, canoeing, kayaking, paddle boarding and sandboarding etc.

Alongside the above, which create a number of compelling events (for participation) and attendance, Wexford has a number of unique offerings that can be further developed and promoted to support tourism. Such offerings include:

- The Wexford Half Marathon
- The Winter Shore Angling Festival (which Wexford has host on a number of occasions)
- Wexford Racecourse (which hosts approximately ten meets each year)
- Enniscorthy Greyhound Stadium (a key destination for greyhound racing within the region)

It is recommended that consideration be given to the further development and promotion of Wexford as a vibrant sporting destination. The scope of this should also consider the attraction of new events, such as triathlons or Iron Man competitions, which would play to the county's natural geography and landscape.

Wexford's golfing offering should be leveraged in particular. It is noteworthy that Fáilte Ireland stress the importance of niche tourism offerings. With this in mind, elevating the county's golf offering, especially links golfing in the US market offers good potential for tourism development. Furthermore, Club Choice Ireland, a Wexford-based company, is a leading incoming golf tour operator in the country, with thousands of golfers travelling with them each year. The connectivity between Wexford's golf offering and operators like Club Choice should be further developed.

Conclusion

In truth the heartbeat of the strategy for growth lies in Wexford's capacity to develop, position and promote an outstanding portfolio of unique and engaging experiences. The good news is that in terms of raw material, i.e. existing tourism assets, tourism assets under development and potential tourism assets Wexford already has a tremendous number of elements to work with.

The visitor experience development framework sets out a structure through which key stakeholders, at an industry, council and agency level can come together with focus to combine their efforts to make Wexford famous for a number of standout tourism experiences, in doing to rejuvenating the county's tourism offering and positioning it for success in the future.

The framework has also been designed so that it guides future investment, whilst also enabling existing projects to be integrated into a more coherent tourism offering. All development must also pay attention to key dynamics such as accessible and sustainable tourism whilst also considering other key consumer needs and dynamics such as providing pet-friendly offerings.

Lastly, the experience development framework calls for the county to think big and imagine new tourism propositions - building an ethos and culture of innovation.

C: CAPACITY BUILDING

STRATEGIC GOAL

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

Wexford as a county and a destination has a rich tradition of providing great holidays to the domestic market particularly Dubliners.

Research and analysis indicate that the current product and offer illustrates that providers understand the needs of the domestic market and provide a service that has delivered business. However, the degree to which this understanding will contribute to a competitive international offer in the future is questionable.

This strategy is underpinned by the ambition to grow the county's share of international visitors and position Wexford as the jewel in the crown of Ireland's Ancient East. The county has many built heritage sites (castles, monasteries, forts and houses), and has a great coast line dotted with coastal villages and a lush countryside with a rich tradition in food farming that produces some outstanding produce.

All these assets must now be 'remixed' and cast as a contemporary tourism offering that results in standout experiences that connect with existing and targeted potential visitors. If Wexford is to provide experiences and motivational content that positions the destination as a must do in the context of Ireland's Ancient East and as a distinctive and authentic place to stay and spend time, further partnerships and collaborations with communities, business, public and private interests must be developed and invested in.

Wexford County Council must lead the design and delivery of a multi-faceted capacity building programme that is delivered by the partners and stakeholders who have the remit and resources to contribute to make the strategy set out a reality.

The strategy must also be supported by recognising that it is the people, through their ideas and activities and storytelling, to providing local food and hospitality with pride and passion which will animate the destination and make it unique.

A galvanising and positive directive role for Wexford County Council, in partnership with Fáilte Ireland and local enterprise offices, is required to lead this partnership and drive a well-designed and resourced capacity building agenda forward.

This must be informed by supporting community, business and public and other partners, such as Wexford Local Development and Wexford Trails to understand the needs of the target international leisure consumer segments (Culturally Curious and Great Escapers) and collectively scope tailored plans to deliver the iconic visitor experiences identified in this strategy and aligned with the visitor experience development framework.

Opportunities to be innovative and stand apart from national and international competitors must be harnessed. Having interesting castles, wonderful coastline and good local food is not enough. Others are and will be much better. Being good gets visitors, being great gets market share.

Investment will be required to deliver impact and position the destination to deliver on its vision and ambition. Specifically, there is a requirement to design and deliver a bespoke Wexford support programme that supports:

- Servicing the international visitor (many businesses do not have any offer or indeed facilities to attract or support engagement with non-English speaking markets).

- International trade ambassadors, in partnership with Visit Wexford, Tourism Ireland and Fáilte Ireland, to represent the county and destination at international events / trade shows and build networks that other partners in specific hubs and projects can benefit from.

- "Saleable experiences and packages" development by working with Fáilte Ireland and others to ensure all providers have access to supports to develop the best targeting specific domestic and international consumer segments.

- The development of the digital story telling capabilities (in partnership with Fáilte Ireland). Collaboration with international and national leaders and institutions is suggested as well as the development supports and incentives to encourage communities, partners (public and private) to curate and create content and stories that can be shared online and onsite.

- The development of a Wexford Champion Award and Recognition scheme by Visit Wexford and Wexford County Council - that builds on the Wexford people's innate sense of place and welcome, engage community and youth groups to develop and support local heritage and culture projects and provide incentives to share with others and include visitors.

- Leadership in sustainable tourism visitor management. Supporting communities, towns and hubs to use and promote the assets on their doorsteps in a sustainable and environmentally sound manner, collaborating with national (e.g. Tidy Towns) and international agencies and initiatives that support green / responsible tourism initiatives.

- Incentivise support for off and shoulder season experiences. Collaborating with Fáilte Ireland in particular to support and fund capacity building and tourism initiatives that demonstrate the capacity to drive season extension and off-season visitation.

- The opportunity of the Opera Festival to (re)-engage ITOA and tour operators with expertise in international markets.

Conclusion

Wexford has a long tradition of developing and delivery great tourism experiences. The county benefits for a strong industry base and communities that welcome and are motivated to support the tourism sector. However, it is imperative, particularly in the context of Ireland's Ancient East and the ambition to achieve a much greater share of international visitors, that Wexford's capacity to deliver an outstanding, holistic and coherent tourism offering is strengthened.

Wexford County Council must lead the design and delivery of a multi-faceted capacity building programme. This must be fully supported by the communities and industry partners that make tourism happen in the county.

D: PARTNERSHIP DEVELOPMENT

STRATEGIC GOAL

To increase stakeholder and industry collaboration so that enterprises and experiences are developed around a shared vision and ambition.

The success of the strategy is dependent on building a partnership model that identifies and harnesses the support from the right mix of organisations, authorities and key players.

It is important that in building a shared framework for delivery that relevance and skills over bureaucracy and old models are nurtured – as having the right partners over the usual suspects will support moving new experiences, products and services into a market reality.

To do this all must understand their role in terms of what can be delivered and why and invest time in building a well-resourced plan that is measured by ongoing commitment to gathering insights and using research to keep pace with visitor needs and trends to drive constant improvement and innovation.

Specifically, all must:

- Have a collective understanding of the prize /propositions
- Invest in a structure for implementation
- Support stakeholder engagement
- Develop and invest in shared plans across each strand of the strategy
- Share investment in market development and communications
- Commit and welcome measurement and evaluation

How this partnership and sense of collaboration is developed and managed is detailed in the recommendations relating to delivery structure.

E: BRAND AND MARKETING COMMUNICATIONS

STRATEGIC GOAL

To invest in building understanding, capacity and execution capabilities in marketing and communications to support awareness creation, trial and conversion of target consumers.

Whilst a significant part of the strategy focuses on the development and improvement of visitor experiences and cultivating the partnerships/networks that will deliver them it is imperative that the Wexford brand is strategically developed and managed.

Great destination brands obsess about building knowledge, differentiation and personal relevance with target visitors, understanding that for the most part consumers have a limited attention span and there will be a multitude of other destinations competing for their attention. With this in mind, and with what will be finite resources, it is important that the destination brand is clear and coherent in terms of its communications and marketing.

In addition to this it is important to note that a wide range of stakeholders influence the Wexford destination, from Tourism Ireland to small café owners, and efforts must be made to ensure a common understanding of how Wexford is to be positioned to consumers in order to drive consideration. In order to support both consumer and stakeholder understanding of the Wexford brand a simple brand architecture model has been developed (illustrated on next page). Brand architecture is a tool that enables consumers to navigate and understand what the destination has to offer whilst also creating a common stakeholder understanding of the brand offering.

Brand Architecture Overview

TARGET CONSUMERS

Domestic 1 Families

Domestic 1 Older Couples

Overseas 1 Culturally Curious

Overseas 1 Great Escapers

IRELAND'S ANCIENT EAST — Wander Through Time

EXPERIENCE BRAND

WEXFORD — SO OLD, SO NEW

DESTINATION BRAND

Key Ireland's Ancient East Cluster

Maritime Town

Coastal Experience

Culture and Heritage Experience

KEY EXPERIENCES
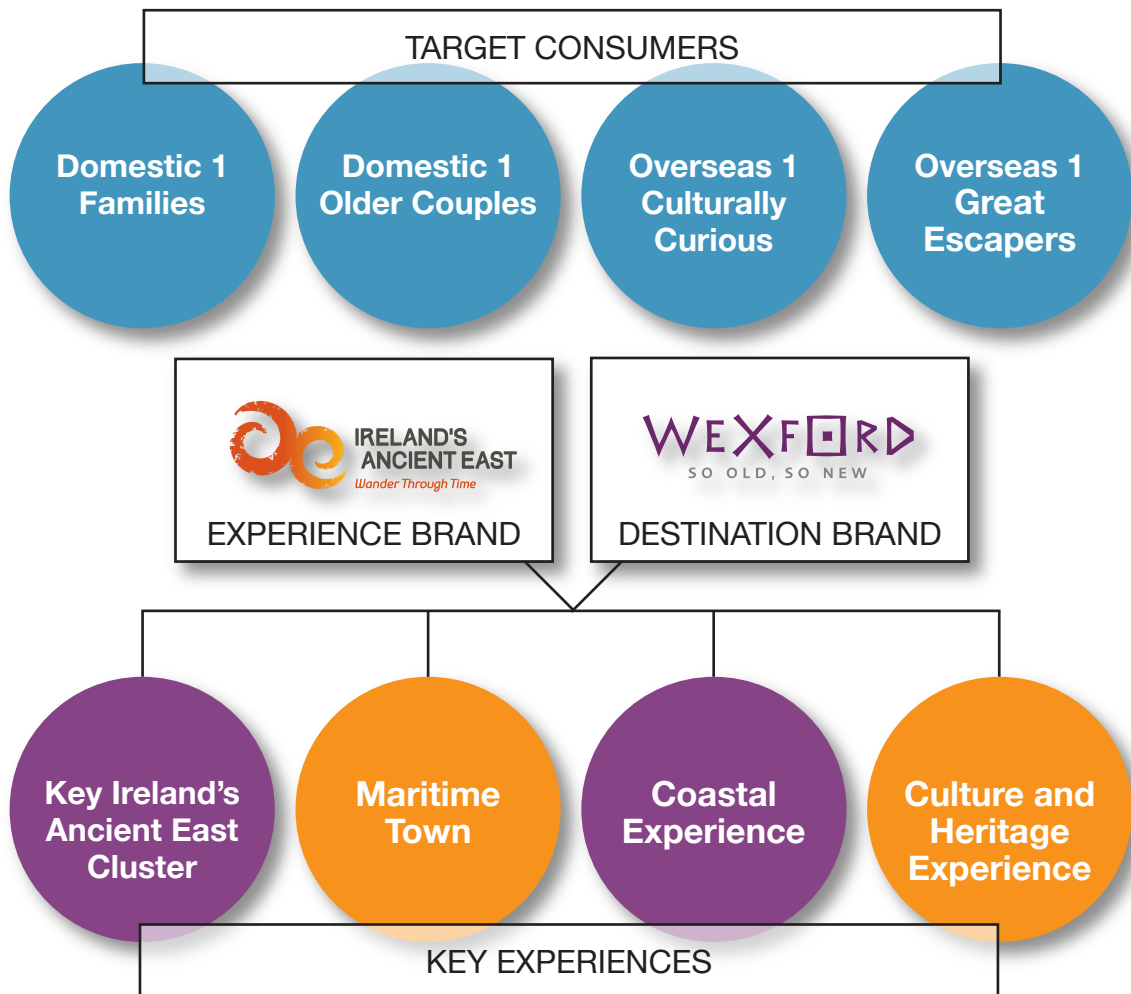
The brand architecture essentially recommends that primacy is given to the Ireland's Ancient East brand ahead of destination Wexford. It will be important in the context of strategy implementation that Wexford develops its position within the Ireland's Ancient East brand. The Ireland's Ancient East brand needs to be continuously developed and invested in, ensuring visibility, distinctiveness, relevance, traction and reassessment and Wexford must form a key element of the brand.

Given limited resources and the fact that overseas visitors are currently visiting the region a major opportunity resides within the Ireland's Ancient East offering. This provides the opportunity for bundling and communication of existing and established iconic experiences across a region.

In order to facilitate the above ambition, the brand architecture sets out the key Wexford brand propositions that should receive focus and investment in to the future. These are aligned with the visitor experience development strategy. By building the experiences identified and positioning them in the context of Ireland's Ancient East, Wexford will in a deliberate and focused way develop the brand knowledge, differentiation and relevance that will be vital to fuelling growth.

With respect to brand and marketing communications it will be imperative that:

- The brand architecture is socialised among key tourism stakeholders across the county, building awareness, knowledge and buy in. Adhering to the proposed brand architecture will be vital to ensure coherence in terms of efforts and communications for all promoting Wexford as a tourism destination.

- Key stakeholders are clear about and focused on the key target segments - ensuring that key stakeholders / product and experiences owners are focused and clear on how to communicate to consumers both on a domestic and international basis.

- A clear Wexford message is framed within the context of the Ireland's Ancient East brand. With this in mind a review of the current brand positioning, "Wexford, So Old, So New", should be undertaken to ensure it fits logically and seamlessly with the Ireland's Ancient East brand and the communications activities of Fáilte Ireland and Tourism Ireland.

- The digital footprint of the Wexford brand, key experiences within the brand and key operators is optimised.

- Research into the salience and appeal of the brand is conducted on an annual or biannual basis is carried out. Tourism is a dynamic sector and consumers' needs are continually changing. Separate from visitor numbers it will be important to measure the overall profile of the Wexford brand in its own right and within the context of Ireland's Ancient East. It is envisaged this research would be integrated into work already being undertaken by Fáilte Ireland or Tourism Ireland.

- A concerted effort is made to ensure that Wexford's offering is showcased and included in the programming to tour operators. The brand and experiences must be easily purchasable and it will be important that Wexford tourism's B2B network is continually developed. This will require key industry players to focus on and invest in developing a greater presence with key inbound tour operators.

- Current PR and publicity programmes (supported by Visit Wexford) are developed further. Above the line communications are costly and the county must deploy an 'earned media' strategy to ensure greater return on investment for marketing spend.

- Offerings can be easily adapted by Tourism Ireland into marketing collateral in overseas markets thus reducing industry spend.

Conclusion

Whilst much of the strategy set out and the investment required to deliver it focuses on product and experience development, these developments must be supported and leveraged by effective marketing and communications. Rather than hiding its light under a bushel it will be vital that Wexford's tourism offering is actively positioned and promoted on a national and international basis.

With marketing generally costly it will be important that all stakeholders' efforts, industry and agency, are coherent and coordinated, making sure that Wexford is on brand and target with its marketing efforts. Alongside paid media it will also be important that Wexford drives and delivery earned media, e.g. PR, publicity, social media and word of mouth. In this regard digital and content creation capabilities must be strengthened.

Potentially most importantly, the county must work together with both Fáilte Ireland and Tourism Ireland to ensure Wexford is visible and a/the leading element of Ireland's Ancient East brand. As the Ireland's Ancient East brand matures and becomes more widely known of and esteemed so will Wexford as the jewel in the crown of the Ireland's Ancient East proposition.

6. Implementation and Action Plan

6.1 Overview

The following section details the delivery structure that should be established to facilitate the implementation of the strategy. Whilst the strategy that has been set out provides a clear direction for the future it is only of value if key stakeholders come together and take decisive action to implement the strategy, bringing about the desired change and ultimately delivering growth.

As emphasised throughout the strategy the tourism potential of Wexford is significant, with a strong tourism instinct in the county and a breadth and depth of assets (product and experience) present. With this in mind it is imperative that the appropriate delivery structure is agreed, established and begins to operate effectively.

In addition to the delivery structure this section sets out, in line with the strategy framework, the required implementation plan. This plan details the key initiatives, deliverables, resource requirements and defines the parties accountable for each respective initiative.

6.2 Delivery Structure

Context

The tourism industry in Wexford is currently organised under the auspices of Visit Wexford, a group made up of accommodation providers, regional groups such as Wexford Trails and Wexford Local Development (WLD), which is supported by Wexford County Council in marketing the county mainly in a domestic context.

The ambition for tourism growth in the county coupled with recommendations regarding repositioning and planning for growth, provides an optimum opportunity to reconfigure how tourism is delivered in the county.

Industry perspectives regarding the strategy indicate a strong desire for a cross-industry approach which would include accommodation providers, food and hospitality providers, tour operators and those who deliver products and experiences.

To ensure excellent delivery of a destination experience within the context of Ireland's Ancient East it is crucial that state agencies be included in preparation for roll out of the strategy and its delivery. The Office of Public Works is a key partner in the near-term delivery of important experiences to visitors. Similarly, Fáilte Ireland is a crucial partner in developing industry capability to deliver excellent experiences, whilst Tourism Ireland will be key in position Ireland's Ancient East and Wexford offering in international markets.

The Challenge

The success of this ambitious strategy is dependent on building a partnership model that identifies and harnesses support from the correct mix of organizations, authorities and key players.

The theme of collaboration emerged very strongly throughout stakeholder consultations as an area in which trade and industry would like to see a change in relation to how they work together in the county.

The work and effort of various stakeholders is not currently guided by a unified vision for Wexford tourism. There is an opportunity in the context of this strategy to reassess the structure of tourism in the county which allows us to decide what is the best way to move forward in this regard and ensure all parties and working with a sense of common cause and a clear vision.

The Opportunity

The realignment of roles of Wexford County Council, Visit Wexford and their partners in delivery presents an opportunity for all parties to work together and in close partnership with the community and tourism agencies to provide leadership and expertise in delivering the aims and goals of this strategy.

In the following section we will outline a proposed structure for Wexford tourism based on current strengths, aligned with emerging opportunities and utilizing the knowledge and expertise within the county and cooperating agencies.

Delivery Structure For Wexford Tourism Strategy

There is a renewed opportunity for all stakeholders to work closely and effectively whether they be local, county, regional or national to develop the tourism industry in Wexford. The support and cooperation of the many private and public sector stakeholders working together with Visit Wexford and Wexford County Council will be crucial to the successful implementation of this plan.

Supports and a collaborative structure are necessary to engage industry and hold them accountable for their role in growing and selling tourism.

To ensure success all actors must understand their role, what can be delivered, why and how. They must invest time in building a well-resourced plan that is underpinned by ongoing commitment to gathering insights and use research to keep pace with visitor needs and trends in driving constant improvement and innovation.

The following framework sets out the structures, leadership and resources required in the county to deliver a new tourism strategy.

6.2.1 Wexford Tourism Partnership for Delivery Structure

Wexford Tourism Partnership for Delivery

Strategy Implementation Leadership Group (6 - 8 members)

- Senior industry leaders with international exposure
- OPW
- Fáilte Ireland
- Wexford Opera Festival CEO

Executive provision to the leadership group from Wexford County Council Tourism Team

Visit Wexford (8 - 10 members)

- Representatives of industry and attractions
- Representatives from four local Authority Districts
- Wexford Local Development
- Wexford Tourism implementation

Marketing implementation
Strategy implementation

Visit Wexford Director. Implementation and operational activity oversight

Clear collective and measurable targets

The structure of the partnership is based on the two existing key elements in tourism delivery namely Visit Wexford and Wexford County Council, and adds a specific leadership implementation body for delivering the strategy.

In effect the Strategy Implementation Leadership Group is charged with setting and monitoring the strategic direction. They are in effect the custodians of strategy. It is envisaged that this group would meet on a quarterly basis to review progress, make interventions as necessary and adjust the strategy as required.

Working in partnership, but also taking direction from the Strategy Implementation Leadership Group, Visit Wexford should be reconfigured to take on both a strategy implementation and marketing role. In effect Visit Wexford will become the driving force behind making the strategy happen and delivering the desired outcomes. From a marketing perspective, Visit Wexford will continue to be custodians for the Wexford brand in its own right and in the context of Ireland's Ancient East.

Both entities would be focused on clear, collective and measurable targets that would be used to evaluate the implementation and impact of the strategy, whilst also guiding its adjustment where and when required.

The following steps should be considered in constructing the partnership model:

1.   Ensure that time is invested in agreeing shared ambition, structure and roles and responsible (terms of reference).   This will, and should, lead to the establishment and / or alignment of existing groups whose effort must be informed by the strategy. This should include supporting Visit Wexford to become an effective marketing and communication vehicle for the experiences that the county is developing and investing in. Visit Wexford should be led by a director

2.   The strategy must be resourced and serviced by Wexford County Council tourism team and specific work plans and deliverables will be informed by the agreed actions and deliverables each year

3.   Quick wins must be identified to build commitment and belief in the benefits of working collectively.

Specific initiatives may require new or different combinations of partnership and may suit the delivery of specific supports to pilot new approaches for programmes or funding where small shared public investment will unlock new elements. In this regard there will need to open-mindedness in terms of how stakeholders will work with one another in order to get things done.

Specifically, members of the partnership must have:

- A collective understanding of the prize /proposition

- Invest (time, money and people) in a structure for implementation

- Support stakeholder engagement

- Develop and invest in shared plans across each strand of the strategy

- Share investment in market development and communications

- Commit to and welcome measurement and evaluation.

It is crucial to success that key agencies and partners are involved and take a strong position on the roll out of the strategy.

6.2.2 Regional Partnerships

The Wexford Tourism Statement of Strategy and work programme 2017 - 2022 identifies the attraction of more overseas visitors (and reduction of dependence on domestic market) to the South East as a key challenge facing tourism in the South East region.

In order to address this challenge, the regional local authorities have co-operated on a number of initiatives in recent years. It is imperative to the implementation of this strategic plan that close collaboration be maintained.

Wexford, Waterford and Kilkenny are important ingredients of Ireland's Ancient East and it is therefore important that the South East presents a strong regional presence and unique identity to attract and retain international visitors within the region.

Analysis undertaken indicates that there are increasing numbers of international visitors in the region, however the numbers are not distributed evenly across the counties indicating that tourists are not necessarily touring the three counties but may visit one attraction (and one county) and move on. Closer cooperation and regional initiatives within Ireland's Ancient East are intended to address this.

Among the initiatives Wexford, Waterford and Kilkenny have invested in are the extension of the Waterford Greenway, a key development within the South East region. This Greenway must be manged closely with a proposed Regional Greenway office in development, based in Wexford. This office will manage the extension of the Greenway, through the development of the South East Greenway Network, ensuring connectivity and its efficient delivery. Greenways have proven to be highly successful visitor attractions and this development is strategically aligned with a number of elements contained with this plan.

In addition to this, collaborative tourism marketing initiatives targeted at the UK market were undertaken in 2016 and 2017. The partners in this project included the Local Authorities (Wexford, Waterford, Kilkenny), Tourism Ireland, Rosslare Europort, Irish Ferries and Stena Line. The impact of these efforts must continue to be actively measured and the collaborative effort and investment continued.

Collaboration has been managed by the economic development departments within the local authorities and there is a commitment to maintaining this methodology for collaboration.

There are a number of elements already in place, however these elements need to be further addressed by the local authorities, these include:

- A collaborative regional landing page promoting the region to international visitors supporting the regional identity within Ireland's Ancient East.

- Regional marketing efforts within the Ireland's Ancient East region (including efforts to draw potential visitors' attention to international the access points of Rosslare Europort and Waterford Airport).

- Support for the Barrow Tourism Awards and regional collaboration designed to develop tourism activities along the Barrow.

- Development of Norman Wexford as a tourism, arts, education and cultural project which includes the development and extension of the Norman Way Trail regionally.

- The Viking development opportunity for Wexford Town and the National Heritage Park.

The above initiatives provide a robust basis upon which to continue to collaborate and strengthen broader regional collaboration and impact. The management and cultivation of key cross-county working relationship must be a key focus in the implementation of the strategy.

6.2.3 Commercial Partnerships/ Charitable Trust

In seeking to manage heritage properties and other relevant attractions in order to provide the best visitor experiences possible Wexford County Council should explore a new operator model to manage a number of properties.

The advantages to WCC in this regard include acquiring commercial expertise in for-profit operation of facilities including visitor experience, catering, event management, festival operation, retail development and potentially special event offerings (festivals, weddings, concerts, business conferencing, corporate entertaining etc.).

Local authorities in Ireland have used this model in recent years to manage multiple properties in their heritage portfolios. A particular approach to the model involves the establishment of a separate management company which contracts the operator and therefore deals with all operational and corporate elements of the operator contract. The operator is contracted for a specified number of years and is appointed via a tender proposal.

The criteria applied for operator appointment might include:

CRITERIA FOR APPOINTMENT OF OPERATOR TO HERITAGE SITES AND VISITOR EXPERIENCES

The operator must provide **a visitor development and integrated programming plan** which includes:

- Coordination of the customer experience across multiple properties linked to the wider Wexford Heritage Services and OPW sites.
- This will cover all aspects of the visitor welcome and customer experience and include delivery of heritage interpretation, catering, event management, festival operation, retail development and potentially special event offerings (festivals, weddings, concerts, business conferencing, corporate entertaining etc.).

A structured business plan to articulate how the visitor development plan will be implemented and commercialised:

Elements of the business plan should include:

- Strategic marketing and promotion,
- Income generation targets,
- Investment in the retail and food offers,
- Development of wider commercial opportunities and
- The skills and staffing structures required to deliver a first-class customer experience.

A facilities management plan to coordinate aspects of the customer experience Including:

- The ambience and environment of the properties
- Cleanliness and accessibility of the customer accessible areas
- The tour of properties/ experiences
- Aspects of good customer service.

Community involvement - Positive engagement of local communities including potential initiatives such as:

- An official volunteering scheme
- A coordinated 'friends of' group
- Local schools and community-based organisations involvement in projects and programmes at the properties and attractions.

Other options for commercial partnerships or trusts include:

A.

Private ownership, management and control - this is frequently used for commercial visitor attractions but less so with heritage sites which are generally run under a Trust structure

B.

Create a single management structure for all heritage properties and attractions based on a charitable trust model in partnership with others whilst retaining overall strategic control.

The charitable trust model allows for properties to be divested to a self-financing charitable trust, either separately or as a group.

This is the most common model for heritage properties in Ireland and the UK. The attraction or property is generally owned by a charitable trust, which is not liable for corporation tax, and it is managed by a separate subsidiary company on a commercial basis. The trust is in a position to raise capital in the form of grants and donations.

Conclusion

Strategy only becomes valuable when it is acted upon. With this in mind setting up, managing and maintaining the optimal delivery structure will be a critical factor in the success of this strategy. The tourism stakeholder system is wide and varied and often inherently difficult to coordinate. However, when a county or counties pull together with common cause and focus on delivering a outstanding tourism experience for the consumer all stakeholders benefit.

It is also vital that the delivery structure is connected to a permeates it influence to grassroot and community levels. Regional partnerships must be invested in and cultivated over time so they act as key drivers and delivery mechanisms for the strategy. Lastly, it will be important that both an innovative and pragmatic approach is adopted in terms of findings means and parties to implement elements of the strategy. Delivery platforms such as commercial partnership and charitable trusts should be considered and used as appropriate.

6.3 Action Plan

To deliver on the strategic priorities, and fulfil the strategic objectives, this section sets out the key initiatives and actions required under each of the five strategic areas of focus. The actions are set win a five-year timeframe (2019 - 2023) and designed to support the achievement of the overall growth targets as they relate to visitor revenue and numbers.

Strategy Element A: TARGET MARKETS AND SEGMENTS

STRATEGIC GOAL: To diversify the visitor base by growing the volume of US, French and German visitors whilst consolidating the share of domestic visitors and volume of GB visitors

INITIATIVES	DELIVERABLES	KPIs	RESPONSIBILITY
1. Communicate market and segment growth strategy to local industry and key stakeholders at a county level	Industry awareness and strategy - knowledge of segments and market opportunities	Industry engagement (suggest via events)	Visit Wexford (supported by Fáilte Ireland)
2. Develop and implement a focussed sales and marketing plan aimed at priority domestic and overseas markets (including development of sales capabilities and networks)	Detailed and appropriately resourced sales and marketing plan for key domestic and overseas markets Implementation of initiatives detailed within plan	Clear, focused, prioritised and resourced plan Implementation (and impact) of key initiatives determined within plan	Visit Wexford in collaboration with industry stakeholders, Fáilte Ireland (domestically), Tourism Ireland (overseas)
3. Increase attendance at key trade shows	Increased presence and visibility of Wexford (within the context of Ireland's Ancient East at trade shows)	Number of trade shows attended (3 year commitment required)	Industry in partnership with Tourism Ireland
4. Collaborate with the ITOA and potential trade partners in order to create more programming from overseas markets	Increased level of programming (itineraries weighted in Wexford and bed nights) from key overseas markets	Number of new programming initiatives (being actively sold overseas)	Strategic Implementation Leadership Group (SILG), Visit Wexford, ITOA and Tourism Ireland
5. Audit French and German digital footprint (key websites). Address gaps and increase book-ability	Assessment of content for potential French and German consumers (website in French & German) and prioritised plans to address key gaps and create frictionless book-ability	All key digital footprints (web/mobile) multilingual in content (English, French and German)	Visit Wexford in collaboration with local industry

Strategy Element A: TARGET MARKETS AND SEGMENTS continued

INITIATIVES	DELIVERABLES	KPIs	RESPONSIBILITY
6. Seek optimal positioning of Wexford within all domestic communications and activation of the Ireland's Ancient East brand	Wexford key experiences / clusters optimally position within all Ireland's Ancient East communications and brand activation initiatives	Frequency and quality of positioning of key Wexford experiences / clusters	Visit Wexford in collaboration with Fáilte Ireland, local industry
7. Increase level of FAM trips to Wexford, with a focus on key experience clusters	Increased number of FAM trips for overseas trade - leading to new programming opportunities	Number of FAM trips per annum	Visit Wexford in partnership with Tourism Ireland - supported by local industry
8. Develop an actionable understanding (via consumer research) of how consumers, think, feel and act with respect to Wexford as a holiday destination on regular basis	Dynamic insight and understanding to key consumer perceptions - that can in turn inform the county's marketing efforts and product/experience development	Consumer insight reporting on an annual or biennial basis	Visit Wexford, Fáilte Ireland and Tourism Ireland
9. Audit availability of multilingual interpretation facilities at key visitor attractions – enhance facilities as required	Delivery of multilingual interpretation facilities at key visitor attractions	Number of attractions that offer multilingual interpretation facilities	Visit Wexford, Fáilte Ireland and Tourism Ireland
10. Promote a regional marketing campaign across all the counties of the South East	Regional marketing campaign across all the counties of the South East in order to bring an offering of sufficient critical mass to the international market	Execution of coordinated regional market campaign in international markets	Visit Wexford in partnerships with peer counties tourism marketing bodies

Strategy Element B: VISITOR EXPERIENCE DEVELOPMENT
STRATEGIC GOAL: To strengthen, develop and elevate Wexford's range of compelling, unique and must do visitor experiences, creating real standout and competitive differentiation.

INITIATIVES	DELIVERABLES	KPIs	RESPONSIBILITY
1. Devise dedicated plan to enhance both seasonal and regional appeal of the county's offering	Detailed and prioritised plan – followed by implementation	Greater volume and value delivered in shoulder seasons and on a regional basis	Local industry and experience owners supported by Fáilte Ireland
2. Envisage, define and create an entirely new and original iconic attraction of scale that can be owned by Wexford	One new, original and potentially iconic attraction of scale developed (potential on a 4-5 year horizon)	Identification and development / commitment to development of new attraction of scale	SILG, Visit Wexford, WCC, Fáilte Ireland
3. Develop cross county working group to devise and implement a plan to deliver outstanding cross county tourism propositions	Cross county proposition development plan - implementation of plan	Number of cross county propositions established and marketed (attracting domestic and overseas visitors)	WCC, Local industry, Fáilte Ireland
4. Complete industry 'learning journeys'(e.g. to Cornwall) designed to inspire an inform future clustered product and experience development	Industry insight and understanding of leading tourism experiences in peer markets - a basis for future experience improvement and development	Biannual learning journeys to peer destinations	Local industry, experience owners - supported by Fáilte Ireland
5. Strengthen and integrate Wexford's food and drink offering as core element of the county's tourism proposition	Clear set of actions designed to embed food and drink within overall county tourism offering	Develop Wexford as part of Ireland's Ancient East and a leading food destination within Taste the Island (Failte Ireland National Brand to target overseas business)	WCC, Taste Wexford, Wexford Food Family, local industry

Strategy Element B: VISITOR EXPERIENCE DEVELOPMENT continued

INITIATIVES	DELIVERABLES	KPIs	RESPONSIBILITY
6. Develop and define the newly defined clusters (Using Fáilte Ireland's National Experience Development Framework) with a compelling narrative – substantiated by experiences and itineraries that maximise the opportunity from Ireland's Ancient East	Clearly defined experience clusters (in the context of Ireland's Ancient East) and plans that demonstrate how they will be developed in to the future	Experience clusters defined and promoted on a county, national and international basis	Developed by Visit Wexford and Fáilte Ireland Promoted by Fáilte Ireland and Tourism Ireland
7. Develop calendar of events and festivals (building on current events/festivals) designed to appeal to key target segments / aligned with the Ireland's Ancient East brand	Target segment centred and optimised events and festivals calendar (serving the county generally and on a regional / seasonal basis)	Defined calendar of events/festivals that support outstanding visitor experiences	Visit Wexford, industry, events/festivals owners and Local Authority Municipal Districts
8. Commission study to explore, identify and assess feasibility of developing a new and unique attraction of scale	Clearly defined and feasible concept that could be translated into an attraction of scale	Study completed and future attraction of scale identified	SILG, WCC
9. Support and facilitate accommodation capacity development	Planning permissions approved for accommodation development projects	Volume of new accommodation (rooms) created	WCC, Industry

Strategy Element C: CAPACITY DEVELOPMENT

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

INITIATIVES	DELIVERABLES	KPIs	RESPONSIBILITY
1. Design and deliver of a multi-faceted capacity building programme	Clearly defined, actionable and well resourced capacity development plan	Capacity development plan in place and implemented	WCC in collaboration with key industry stakeholders
2. Informed by a training and skills needs analysis develop and implement a Tourism Education and Training programme to address the identified gaps in capabilities Wexford	Focussed Tourism Education and Training programme	Number of individuals and organisations engaged in the programme	WCC in collaboration with Fáilte Ireland, LEO, WWETB and IT Carlow
3. Develop digital story telling capabilities	Dedicated digital storytelling training/capacity building resources in place	Provision of and participation in training Resources in place	Fáilte Ireland
4. Provide industry with research and insights that identify consumer trends, emerging opportunities and competitor destination initiatives that are shaping tourism	Relevant research and insights to inform and guide development of tourism product and experiences by industry Industry workshops	Annual actionable research and insight updates to industry Number of industry workshops	SILG, Visit Wexford supported by Fáilte Ireland
5. Engage with education and training providers to provide tourism and hospitality skills and career promotion in the county - supporting the industry and addressing labour and skills gaps	Clearly defined and available range of training and hospitality skills supports Promotion of sector as a career	Number and uptake of training courses Active promotion of sector	Visit Wexford in collaboration with Fáilte Ireland, WIT,IT Carlow Wexford Campus, WWETB and LEO

Strategy Element C: CAPACITY DEVELOPMENT continued

INITIATIVES	DELIVERABLES	KPIs	RESPONSIBILITY
6. Develop resource to support industry / key stakeholders to become national leaders in sustainable tourism	Sustainable tourism resources	Establishment of and industry/ stakeholder engagement in sustainable tourism	Visit Wexford in collaboration with Fáilte Ireland
7. Incentivise support for off and shoulder season experiences	Support, capacity building and funding for tourism initiatives that demonstrate the capacity to drive season extension / off-season visitation	Establishment and marketing of shoulder season experiences	Visit Wexford in collaboration with Fáilte Ireland
8. Establish a capacity building seed fund	Annual seed fund available for local tourism entities to support capacity building and product/experience development	Seed fund established and uptake by local tourism operators	Visit Wexford, Fáilte Ireland

Strategy Element D: PARTNERSHIP DEVELOPMENT
STRATEGIC GOAL: To increase stakeholder and industry collaboration so that enterprises and experiences are developed around a shared vision and ambition.

INITIATIVES	DELIVERABLES	KPIs	RESPONSIBILITY
1. Formally establish the 'Delivery Structure' in line with strategic recommendations	Establishment and activation of the Strategic Implementation Leadership Group (SILG) and recalibrated Visit Wexford entity	Delivery structure established and commencement of strategy implementation	WCC, Visit Wexford, key industry stakeholders, regional partner and communities
2. Identify and deliver a number of initial 'quick wins'	Deliver a number of value creating initiatives within first six months of strategy implementation to create momentum	Number of value creating initiatives implemented	SILG, Visit Wexford
3. Coordinate regional marketing efforts to drive consistency, coherence and impact	Coordinated regional marketing plan	Coherent marketing efforts on a county basis through the regions	Overseen by the SILG and WCC

Strategy Element D: PARTNERSHIP DEVELOPMENT continued

INITIATIVES	DELIVERABLES	KPIs	RESPONSIBILITY
4. Implement a range of local tourism networking events	Number of and attendance at local tourism networking events	Number of events held per annum	Visit Wexford
5. Review on a quarterly basis with stakeholders the implementation of the strategy	Quarterly review of strategy	Review completed - and reported	SILG
6. Develop and implement a public communication plan to raise awareness of the importance of tourism to the economic and social wellbeing of the county	Public communications plan to engage all stakeholders and build their commitment to the delivery of the strategy	Communications plan devised and implemented	Visit Wexford, WCC
7. Support stakeholders to access public and grant funding for tourism projects within the county	Public grant funding support	Grant funding applications and success	WCC, Visit Wexford
8. Explore a new 'operator model' (commercial partnerships, charitable trusts etc.) to manage a number of relevant properties	Review of potential new operator model	Review completed and actions determined	WCC

Strategy Element E: BRAND AND MARKETING COMMUNICATIONS

STRATEGIC GOAL: To invest in building understanding, capacity and execution capabilities in marketing and communications to support awareness creation, trial and conversion of target consumers.

INITIATIVES	DELIVERABLES	KPIs	RESPONSIBILITY
1. Establish and build awareness of the new tourism brand architecture for county	Establishment, awareness and application of new tourism brand architecture	Application of brand architecture	Visit Wexford, WCC
2. Review current brand positioning, 'Wexford, So Old, So New' undertaken to ensure it fits logically and seamlessly with the Ireland's Ancient East brand	Review (and adjustment if required) of current Wexford brand positioning	Review completed	Visit Wexford, WCC
3. Develop a marketing collateral and supports database (to include image database, trade contacts, visitor database, press and media contacts, digital marketing guides etc.)	Marketing collateral and supports database	Database in place and cascaded to relevant stakeholders	Visit Wexford, WCC
4. Work with national tourism bodies in participating in their overseas and domestic marketing campaigns	Presence of Wexford brand (within context of Ireland's Ancient East brand) in domestic and overseas marketing campaigns	Incidence of Wexford experiences in domestic and overseas marketing campaigns	Visit Wexford, Fáilte Ireland and Tourism Ireland
5. Work with partners to maximise marketing spend, lever public and private investment and share marketing campaigns	Maximised marketing spend (including receipt of public and private investment)	Level, impact and reach off marketing spend	Visit Wexford, Fáilte Ireland, Tourism Ireland and Local Industry
6. Create a means to communicate itineraries with offers which can be pushed through key communications channels	Means to easily communicate visitor itineraries and offers	Consistent communication of visitor itineraries on a domestic and overseas basis	Visit Wexford
7. Devise and implement a dedicated digital and social media content strategy	Digital and social media strategy and content (which will be generated on an ongoing basis)	Presence of content on key digital and social media platforms	Visit Wexford, Tourism Ireland

6.4 Monitoring and Evaluation

The Strategy Implementation Leadership Group will be required to regularly monitor the implementation of the strategy.

An annual work programme should be devised and monitored on a quarterly basis, ensuring appropriate implementation.

This work programme should include key metrics. Quarterly monitoring will ensure that the Visit Wexford marketing and strategy implementation groups are delivering consistently and in line with the strategy.

Implementation monitoring (quarterly) should include:

➡️ Successful implementation and deviations from the plan

➡️ Analysis regarding cause and effect of non-achievement of goals

➡️ An appropriate action to resolve each case.

The Group should conduct an annual review of the overarching strategy work programmes to reflect variations in the national tourism outlook, external economic conditions, industry innovations etc.

Approval of the annual work programme and those of the sub groups should be governed by specific action-based and time-bound milestones which are supported by hard metrics.

6.5 Funding and Resources

A budgeted resource base and funding model must be in place to enable strategy implementation.

In addition to the funding and resources as allocated by Wexford County Council and Visit Wexford the following possible sources of funding should be explored:

Fáilte Ireland support in relation to the planning and development of an iconic national attractions and experiences and other elements key to delivering the Ireland's Ancient East brand. Sources include:

➡️ Capital grants

➡️ Small grant schemes for IAT interpretation

➡️ Capacity building supports

➡️ Internationalisation initiatives.

The Rural Regeneration scheme (€315 million 2019 - 2022)
Key elements:

- A focus on town and village renewal to support economic recovery funding is available for suitable projects in towns and villages with a population of less than 10,000 in outlying areas

- It will favour coordinated and integrated projects between government departments, agencies, communities and where appropriate philanthropic funders and the private sector to support sustainable regeneration, encourage entrepreneurship and innovation.

Resources And Funding From Key Partners Including:
Office of Public Works, Waterways Ireland, IFI, government departments etc.
Leader - specifically in relation to funding feasibility studies that can unlock private investment in key projects and community projects.

Infrastructure Development Supports

- Department of Rural Development - Greenway, walking trails
- Outdoor Recreation Infrastructure Scheme (from the Department of Rural Affairs)
- Inland Fisheries Ireland - development of angling infrastructure and supports for shore and sea angling.

Food And Agriculture Supports

- Bord Bia - links to and for local producers and networks
- Teagasc - rural development supports

Education and Training Supports

- Institutes of Technology (Waterford, Wexford)
- Enterprise Training Board
- Department of Education
- Programmes operated by Fáilte Ireland
- Local Enterprise Office
- IY Carlow (Wexford campus).

Marketing:

- Jointly-funded promotions with Tourism Ireland
- Joint funding with Visit Wexford.

Heritage And Cultural Funding

- Festival and events
- Restoration projects (E.g. thatched cottages and farmhouses).

Conclusion

The ambitions of the strategy are significant and as a consequence of this in there will be a requirement for appropriate investment. This investment must not only focus on product and experience development only but also capacity building across all stakeholders (at a variety of levels) and marketing/communications.

Whilst key bodies such as Wexford County Council and local industry will be key investors, the county must be nimble and innovation in how it secures funding from a wide range of sources. As illustrated in this section there are multiple funding sources that Wexford can seek to engage. It is hoped that the ambition and vision contained within this strategy plays a key role securing this vital future funding.

7. Headline Outputs and Results

7.1 Headline Outputs and Results

The delivery of the growth forecast within the strategy will deliver a range of benefits to the county and its people. In board terms the success of the strategy and tourism in Wexford will:

- create new employment opportunities throughout the county
- grow and diversify sources of income to Wexford's local economy
- create and improve local infrastructure, facilities and amenities and
- bring people and communities together.

Ultimately it is hoped and envisaged that a vibrant and ever evolving tourism sector will improve the quality of life of people and communities throughout the county.

More specifically, and aligned to the strategy framework, the key headline outputs are defined as follows:

KEY HEADLINE OUTPUTS 2023				
Target Markets and Segments	Visitor Experience Development	Capacity Development	Partnership Development	Brand & Marketing Communications
Greater focus on, revenue (+15%) from and numbers of international visitors (10%)	Clearly defined and substantiated experience clusters (in line with development strategy)	Clearly defined, capacity development plan implemented consistently	Delivery structure established and functioning efficiently and effectively	Application of new tourism brand architecture
Increased visibility and programming of Wexford internationally	Optimised events and festivals calendar	Tourism education and training programme established and implemented	Coordinated regional marketing plan	Presence of Wexford brand in domestic and overseas marketing campaigns
Wexford positioned as key element of IAE domestically and internationally	Increased and enhanced range of regional and seasonal offerings	Digital storytelling training/capacity building resources in place and cascaded	Annual local tourism networking events	Maximised marketing spend (including receipt of public and private investment)
Multilingual interpretation facilities at all key attractions	Identification of one new potentially iconic attraction of scale	Annual industry workshops that disseminate consumer insight	Public grant funding support	Presence of content on key digital and social media platforms
	500 additional hotel rooms			

7.2 Visitor and Revenue Forecasts – to be updated

Metric	2018 Estimate	2023 Target	Change	Growth %	Average Annual Growth Rate
Domestic Visitors	679,000	746,000	+67,000	9.8%	1.9%
Overseas Visitors	248,000	293,000	+45,000	18%	3.4%
Domestic Revenue	€146M	€173M	+€27M	18.7%	3.5%
Overseas Revenue	€65M	€77M	+€12M	18.7%	3.5%
Total Employment	5,967	6,750	+783	13.7%	

8. Appendix

Appendix 1: Stakeholders Consulted

One-to-one interview:

Company/Group
Enniscorthy Regional Tourism Group
Irish Tour Operators Association
Fáilte Ireland, Ireland's Ancient East Programme Office (2 interviewees)
Irish Tourism Industry Confederation
New Ross Regional Tourism Group
Gorey Regional Tourism Group
Wexford Trails
Irish Hotels Federation & Visit Wexford
Wexford Local Development
Wexford Regional Tourism Group and Guesthouses
Irish Caravan and Camping Council
Restaurants Association of Ireland
Tourism Ireland
Wexford County Council Economic Development and Tourism Section (2 interviewees)
Waterford County Council Economic Development Section
South East Regional Skills Forum
Irish Vintners Association

1 x workshop with local elected representatives
1 x workshop with trade and industry
1 x sectoral world café with trade, industry, community and agencies.

Appendix 2: Submissions received

Submission from Phillip Wallace on behalf of the caravan and camping sector in County Wexford.

Appendix 3: Festival Criteria

The role of festivals in a tourism context are to:
1. Provide opportunities to showcase culture, people and places, and enhance the visitor's Wexford experience
2. Maximise the distribution of tourism revenue around the county
3. Inspire visitors to come at different times of the year
4. Animate destinations, help visitors to meet locals and add to the sense of an authentic, cultural and pleasant holiday

Priority Element	Description	Criteria Match?
A: Does the festival address seasonality?	Can the festival attract visitors outside of peak season and during shoulder periods?	✔ ✘
B: Regionality	Can the festival attract visitors to areas that are not already hotspots?	
C: International attractiveness	Will the festival motivate international visitors to attend?	
D: Develop as a large-scale iconic festival	Will the festival achieve an international profile and compete with established events?	
E: Is it an original and authentic opportunity?	Can it be developed to be intrinsically linked to Wexford and Ireland and not be easily replicated or displaced?	
F: Does it support the key themes of Ireland's Ancient East?	Can it be linked to regionally focused stories and destination themes within IAE?	
G: Operational stability?	Can the festival become operationally stable and self-sustaining within 3 years?	
H: Collaboration	Can a collaboration be created with the Wexford Tourism Partnership for Delivery so that Wexford tourism strategy elements are matched and community benefits accrue?	

Source: Table and criteria based on Fáilte Ireland Festival Innovation Programme Criteria.

Appendix 4: High-level review of top Wexford visitor attractions

Wexford top visitor attractions 2016				
Attraction (A-Z)	**Visitor numbers**	**Bookability (High, Low)**	**Dwell time (how long is a visitor likely to remain at the attraction)**	**Connected - to other significant experiences (accessible within 20 mins drive)**
Colclough Walled Garden	18,161	Low	Medium	Hook Lighthouse Tintern Abbey
Dunbrody Abbey and Visitor Centre	20,000	Low	Low	The JFK Memorial Park & Arboretum Dunbrody Famine Ship Colclough Walled Garden Tintern Abbey Kennedy Homestead
Dunbrody Famine Ship	66,400	High	Medium	The JFK Memorial Park & Arboretum Dunbrody Abbey and Visitor Centre Colclough Walled Garden Tintern Abbey Kennedy Homestead Hook Peninsula
Hook Lighthouse Visitor Centre	46,593	High	High	Colclough Walled Garden Tintern Abbey
Irish Agricultural Museum & Johnstown Castle Gardens	80,584	Low	Medium	Wexford Wildfowl Reserve Irish National Heritage Park Wexford Town
Irish National Heritage Park	N/A	Low	High	Wells House & Gardens Irish National Heritage Park Johnstown Castle Gardens Wexford Town
Kennedy Homestead	9,000	High	Medium	The JFK Memorial Park & Arboretum Dunbrody Abbey and Visitor Centre Colclough Walled Garden Tintern Abbey Dunbrody Famine Ship

Wexford top visitor attractions 2016 continued				
Attraction (A-Z)	Visitor numbers	Bookability (High, Low)	Dwell time (how long is a visitor likely to remain at the attraction)	Connected - to other significant experiences (accessible within 20 mins drive)
The JFK Memorial Park & Arboretum	1105,594	Low	High 5km walk	Dunbrody Famine Ship Dunbrody Abbey and Visitor Centre Colclough Walled Garden Tintern Abbey Kennedy Homestead Hook Peninsula
Tintern Abbey	16,114	Low	Low	Hook Lighthouse Colclough Walled Garden
Wells House & Gardens	130,239	Low	Medium	Irish National Heritage Park Gorey, Enniscorthy, Wexford Towns
Wexford Wildfowl Reserve	19,733	Low	Medium	Irish Agricultural Museum & Johnstown Castle Gardens Irish National Heritage Park Wexford Town d Visitor Centre Colclough Walled Garden Tintern Abbey Dunbrody Famine Ship

Appendix 5: Overview of key activities available in Wexford:

Land based:
Cycling routes and EuroVelo 1
Independent and guided walking tours
Wexford Craft Trail
The Norman Way
Cookery schools
Outdoor adventure
Forest trails
Wexford Heritage Trail
Golf
Greenway (extension to link with the Waterford Greenway)*
Equestrian
Wexford Walking Trail
Wexford Garden Trail
Farm produce and culinary visits

*At planning stage with first stage completion projected for 2019

Wexford County Council is investing in a number of initiatives which match consumer trends in the land-based activity sector, one of which is the Carrigfoyle Activity Centre. The planned outdoor activity centre which includes a world-class trail network comprises approximately 10.2 hectares of spectacular scenery, with a lake, cliffs and forestry (378 hectares of Coillte owned forestry land will form part of the future trail network).

The ultimate aim of the project is to provide an outdoor activity centre which comprises outdoor pursuits, such as zip-lining, canoeing and climbing walls. The first phase of the project is currently at design phase and will be undertaken by Wexford County Council. A further phase will utilise some of Wexford's beaches increasing the water pursuits offered such as sea kayaking, coasteering, open water swimming etc. Carrigfoyle expects to have visitor numbers of 167,500 in the first 3 years of operation.

Overview of key water and seascape-based activities available in Wexford :
Canoe and kayaking
Surfing,
Stand up paddle boarding and sandboarding
Coasteering
Kitesurfing
Powerboat tours
Island visits with food experiences
Sailing
Angling and sea fishing
Blueway*

*Feasibility study underway.

Overview of key family activities available in Wexford:
Beach/seaside activities
Animal parks/farms
Adventure centres
Indoor leisure centres
Pitch and putt
Sea safaris
Go karting
Seasonal experiences, Halloween and Christmas in particular

Appendix 6: Summary market and segment focus

Domestic Visitors		
Segment 1	**Segment 2**	**Strategic Ambition**
Families **Bullseye** Parents in their 30s and 40s with children generally under 10 **Key motivation** To spend quality time together and grow as a family	**Older Couples** **Bullseye** Couples aged 45-64, seeking hotel accommodation **Key motivation** Getting away, relaxing with their partner, having a romantic break	Grow volume and value in line with domestic growth nationally thereby holding market share Project volume growth 2019 - 23 8% Project value growth 2019 - 23 15%

International Visitors		
Segment 1	**Segment 2**	**Strategic Ambition**
Culturally Curious Independent 'active sightseers' looking to visit new places, and expand their experience by exploring landscapes, history and culture **Key motivation** To delve deeper into the history of a location, uncover unusual and off the beaten track experiences	**Great Escapers** Often couples, approx.30 years old in need of time out from busy lives and careers. Specifically interested in rural holidays **Key motivation** Take a break, connect with nature especially the more remote and exciting places to and to reconnect with their partner	Grow the value and volume of international visitors by 3.5% and 3.4% (respectively) per annum leading to a growth of the tourism base comprising international visitors (excluding GB

Appendix 7: Summary market profiles

Market Profile Element	USA	Germany	France
Number of visitors to Ireland	1.3 m	624 k	494 k
Length of stay (average)	9.2 nights	9	10.3
Spend per visitor	€917	€625	€555
Reason for visiting	67% holiday 19% VFR	68% holiday 16% VFR	59% holiday 22% VFR
Percentage of holiday makers from this country interested in visiting Ireland	67%	72%	84%
Best match segment	37% culturally curious	46% culturally curious 14% great escapers	46% culturally curious 12% great escapers
Advanced planning	52% plan 6 months in advance	74% plan 3-4 months in advance	
Transport	386k hire car	201k hire car 40k bring their car	86k hire car 78k bring their car
Activity preference	96% visit sites of historical interest 84% excursions/ events (national parks/gardens/ festivals) 40% hiking/walking	95% visit sites of historical interest 89% Pastimes/events (national parks/ gardens/ festivals) 58% activities (hiking, cycling, water based)	96% visit sites of historical interest 88% Pastimes/events (national parks/ gardens/ festivals) 54% activities (hiking, cycling, fishing, equestrian)

Appendix 7: Summary market profiles continued

Market Profile Element	USA	Germany	France
Profile of holiday maker	58% over 35 92% ABC1	50% under 35 90% ABC1	50% under 35 88% ABC1
Percentage that visit South East	17%	16%	15%
Interpretation and translation preferred		YES	YES
Holiday inspiration	62% Google for inspiration 53% friends and relatives 29% package holiday	66% Google for inspiration 43% friends and relatives 19% package holiday	58% Google for inspiration 43% friends and relatives 15% package holiday

Source: Tourism Ireland market profiles (2016 figures)

Appendix 8: Education And Training Supports

The following elements form the basis of hospitality education and training available to those living in Wexford.

Waterford Institute of Technology's Department of Languages, Tourism and Hospitality has a range of courses in culinary arts and related disciplines including the following:

CAO Undergraduate

Code	Course Name	Duration	Delivery
WD194	Bachelor of Arts (Hons) in Culinary Arts	4 yrs	Full Time
WD173	Higher Certificate in Arts in Hospitality Studies	2 yrs	Full Time
WD148	BA (Hons) in Tourism Marketing	3 yrs	Full Time
WD172	Higher Certificate in Arts in Culinary Arts	2 yrs	Full Time
WD091	BA (Hons) in Hospitality Management	4 yrs	Full Time
WD174	Higher Certificate in Business in Tourism	2 yrs	Full Time

Postgraduate

Code	Course Name	Duration	Delivery
WD 563	Higher Diploma in Arts in International Hotel Management		

Carlow IT Wexford Campus offers a Bachelor of Science in Tourism and Event Management and a Higher Diploma in Business in Tourism Marketing in addition to a range of business courses.

Apprenticeships and Traineeships

Waterford IT is in contact with Tralee IT and is considering participating in the provision of new apprenticeships for example:

- Chef de Partie - 2 years level 7
- Sous Chef - 2 years Level 8
- Executive Chef - 2 years Level 9[25].

Appendix 9: Practical Tourism Sector Supports

In the context of strategy implementation support the following partners are most relevant to success:

1. Fáilte Ireland

Fáilte Ireland will be the most important partner in relation to implementation and working in partnership with them will enable alignment with the Ireland's Ancient East proposition.

Among the supports provided by Fáilte Ireland are:

- Business and industry supports
- Marketing and sales supports
- Brexit ready programmes
- Quality assurance
- Mentoring
- People skills and customer experience
- Accommodation supports.

2. Local Enterprise Office

Fáilte Ireland has a formal agreement with Enterprise Ireland whereby all tourism businesses can avail of the supports and services offered by local enterprise offices (LEOs) nationwide, with tourism specific training courses already in existence.

LEOs offer one-to-one support to existing tourism businesses and start-ups and offer a range of services specifically tailored to help businesses grow. **Details of the supports available can be found by contacting the local LEO.**

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[25] *South East Partnership for Skills Report & Recommendations from Hospitality Sector Skills Needs Meeting. October 2017.*

3. Institutes of Technology

In addition to formal courses offered by Waterford IT and Carlow IT Wexford Campus there may be opportunities in the roll out of this strategy to further partner with educational institutes to develop a more cohesive approach to supporting business in the tourism realm. Among potential areas to be considered are joint research projects, business mentoring and bespoke training.

4. Leader

 The aim of the 2014 - 2020 LEADER programme is to promote social inclusion, poverty reduction and economic development in rural areas. The LEADER programme in Wexford has a budget allocation of €7,580,105.

The three themes of the Leader Programme in Wexford are:
1   Economic Development, Enterprise Development and Job Creation - Budget Allocation €4,882,00
2   Social Inclusion - Budget Allocation €4,882,00
3   Rural Environment - Budget Allocation €380,000

Assistance under the LEADER Programme should, in the first instance, be sought via submitting an Expression of Interest to the Local Action Group (LAG) - lead

5. Education and Training Boards/SOLAS

Waterford/Wexford ETB provides 38 courses across Level 1 to Level 6.

"Introduction to Hospitality" programmes provided by WWETB include work experience placement supported by a number of local hotels, including: Kelly's Resort Hotel and Spa; Clayton Whites Hotel; Ferrycarrig Hotel; Talbot Hotel; and the Riverbank House Hotel. Many of the courses available from the ETBs are only available to registered job seekers.

Notes

THE WEXFORD FOOD FAMILY IRELAND

IRELAND'S ANCIENT EAST
Wander Through Time

WEXFORD
SO OLD, SO NEW

Fáilte Ireland

LCDC
Coiste um Fhorbairt Pobail Áitiúil
Loch Garman
Wexford Local Community Development
Committee

**Comhairle Contae
Loch Garman
Wexford
County Council**

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