

Kildare & Tipperary

THE THOROUGHBRED COUNTRY DESTINATION EXPERIENCE DEVELOPMENT PLAN



IRELAND'S
ANCIENT EAST®
Wander Through Time



THOROUGHBRED
COUNTRY



Fáilte
Ireland

EXECUTIVE SUMMARY - THE PLAN AT A GLANCE

SECTION ONE - KEY RESULT AREAS AND TARGETS

1.1	Key Result Areas and Targets	13
1.2	Key Performance Indicators	14

SECTION TWO - SETTING THE SCENE

2.1	Destination Experience Development Plans (DEDP)	16
2.2	Ireland's Ancient East Overview	17
2.3	How the Plan was Developed	18

SECTION THREE - WHERE WE ARE NOW

3.1	Key Insights Informing our Actions / Research Overview	20
3.2	Situational Analysis	26
3.3	Key Conclusions Based on Research	29

SECTION FOUR – THOROUGHbred COUNTRY DEDP

4.1	Plan Framework	32
4.2	Thoroughbred Country Destination Project Approach	33

SECTION FIVE - DELIVERING THE PLAN

5.1	Plan Implementation	44
5.2	Measuring Success	47
5.3	Environmental Considerations	49
5.4	TCDEDP Action Plan	53

Appendix 1 - Selected Environmental Indicators, Targets and Monitoring Sources

INTRODUCTION

Horses have been an integral part of Ireland's cultural heritage for the last 2,000 years. They are at the heart of the Irish story, from mythical figures to modern day thoroughbred champions and an acclaimed global equine industry. Ireland is internationally recognised for the quality and depth of the thoroughbred industry, delivering world class expertise through industry figures revered throughout the globe. The geographic heart of the thoroughbred story is Kildare in addition to the richness of the Fethard and Coolmore experiences in South Tipperary.

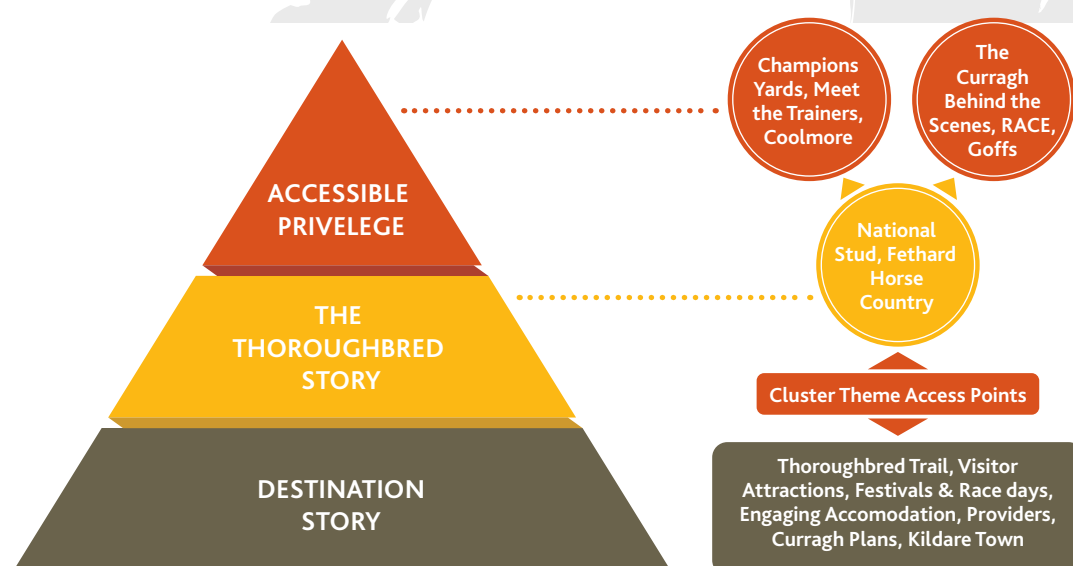
These areas are internationally synonymous with the Irish thoroughbred story and the home to world class icons of the sport contributing to Ireland's global equine status. The tourism opportunity identified within the Thoroughbred Country Destination Development Plan (TC DEDP) and the creation of a thoroughbred tourism cluster matches the ambitious economic development plans for enhanced equine sectoral specialisation in the region. This economic development focus around a strong industry cluster from research, equine science and innovation will be mirrored in a new destination cluster development approach.



The Thoroughbred Country Destination Experience Development Plan (TC DEDP) represents a five-year plan with a vision to deliver the world's best collective thoroughbred visitor experience. The objective of the TC DEDP is to realise the domestic and international tourism opportunity that can be delivered through the heritage of the thoroughbred and the wider ecosystem that surrounds the industry. The plan will form a key element in building future destination resilience post COVID-19 and provide a collaborative platform for tourism activity, contributing to sustained recovery.

The plan will be achieved through the development of a destination cluster with a specialisation focus on the thoroughbred experience theme. It will build on this key point of differentiation with the capacity to develop an international profile through experience innovation and new levels of collaboration. The focus within the TC DEDP is to increase the level of accessible visitor experiences, growing the density and diversity of the destination cluster. It will target new levels of visitor demand to achieve sustained economic returns while adhering to a development ethos matching the world class standards associated with the Irish thoroughbred industry.

The plan is built upon ensuring the thoroughbred story is more accessible to the visitor, combined with new levels of thematic integration across the destination's wider tourism eco-system. This will be achieved through three defined destination development layers. Each layer represents an access point for the visitor, starting with an overall destination approach that then evolves to a new range of experiences delivering behind the scenes access few sports or industries can rival.



Layer 1: Destination Story – The development of a destination cluster and thoroughbred theme told through the destination network of attractions, activities, accommodation, food and drink, placemaking, festivals and events.

Layer 2: The Thoroughbred Story – Core cluster thoroughbred theme access points that attract visitors becoming central to orientating visitors across the destination.

Layer 3: Accessible Privilege – Development of unique and premium 'behind the scenes, money can't buy' thoroughbred visitor experiences.

The experience development layers begin by enhancing the destination story embraced by the entirety of the tourism eco-system. It will deliver new levels of integration into future destination development activity from placemaking, events, master planning, industry development to the creation of compelling visitor experiences.

As the layers progress, the delivery of the thoroughbred story becomes more central to the visitor engagement. The quality of the visitor experience at the larger attractions Irish National Stud and Fethard Horse Country / Coolmore will represent the core thoroughbred access points. These attractions, along with sites such as Newbridge Silverware and Kildare Village, will be central to attracting visitors while playing an enhanced role in the cross promotion of the wider thoroughbred experience base. It will require increased levels of cross-selling/promotion and collaboration across the tourism eco-system.

INTRODUCTION

The thoroughbred industry has the capacity to develop a range of unique and prestige experiences providing behind the scenes access to the workings of the thoroughbred industry. The experiences range from breeding, foaling to the finishing line. These offer a heightened degree of accessible privilege for visitors and offer a very unique experience development platform for both the leisure market and the premium luxury market.

The existing accommodation base and its capacity to attract high yield visitors provides an immediate niche target audience. Equally, it will cater for the broader leisure market offering unique immersive experiences delivered through an added value focus among the tourism industry.

The combination of all three layers provides the destination with a globally unique opportunity and a sustainable point of differentiation. It provides a platform that enables all members of the tourism industry to embrace a globally established profile and integrate with a sector that offers visitors access to 'money can't buy' experiences delivered by global industry icons.

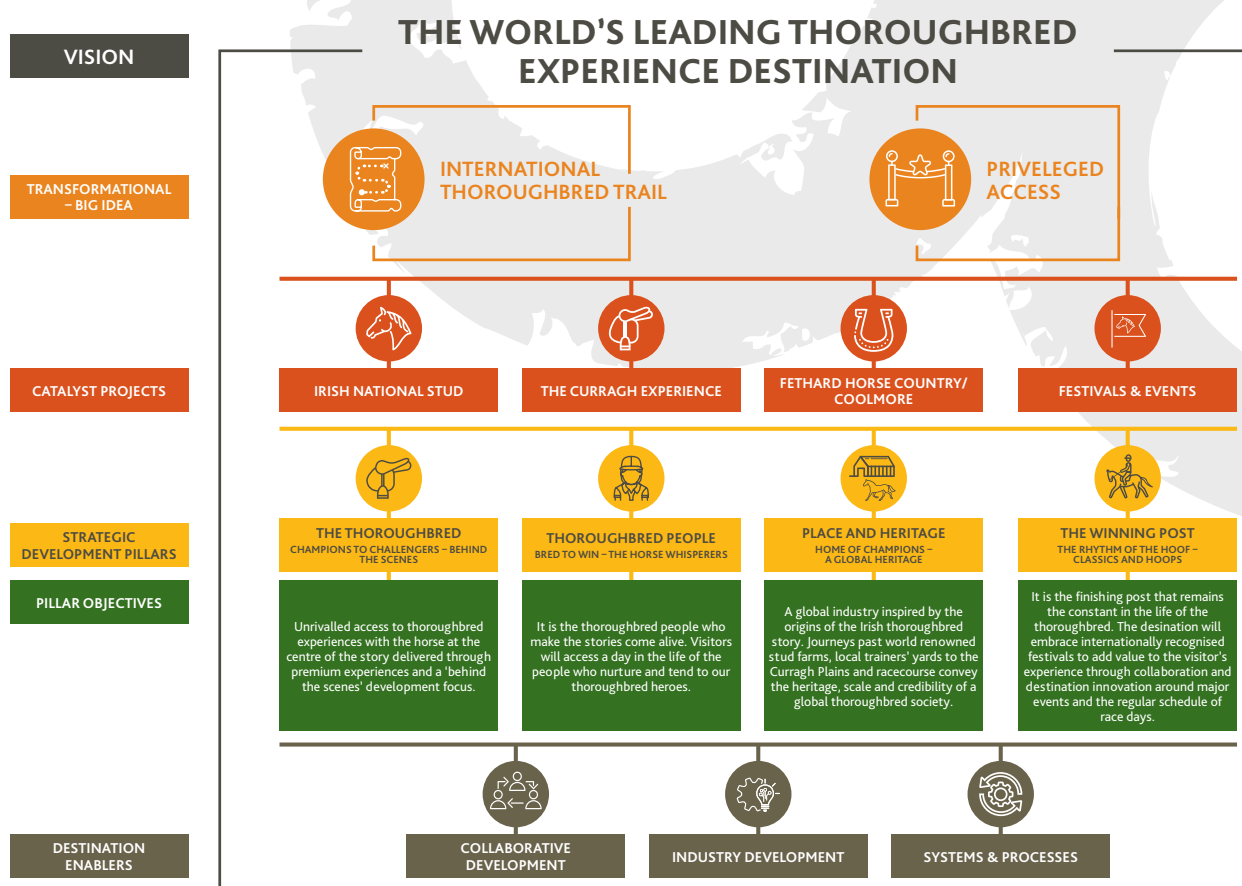


DELIVERING THE PLAN

The destination development approach is based on a number of integrated layers of activity. Each focus area is aligned with the achievement of the vision and delivering on the transformational projects. These represent two projects that enable wider tourism engagement with the theme, while developing strongly differentiated and exclusive experiences.

In order to achieve the strategic objectives of the TC DEDP, the development framework is structured around three interdependent layers of activity. They include;

- A: Achieving the 'Big Ideas' - Transformational projects supported by key catalyst projects**
- B. Strategic Development Pillars - Create the conditions for Experience Development (Developing New Experiences)**
- C. Destination Enablers (Developing the Core)**



A. DEVELOPING THE 'BIG IDEAS' – TRANSFORMATIONAL PROJECTS

1. International Thoroughbred Trail

The richness of the national and destination thoroughbred story requires a multi-faceted approach to deliver a globally iconic thoroughbred trail. The development of the International Thoroughbred Trail (ITT) must strive for an international positioning and must be viewed as central to destination development, providing the tourism network with a mechanism to engage in creating a dense and diverse experience cluster.

Focussing on becoming a year-round engagement to increase dwell time, the ITT will manifest itself through new experience development working with existing experiences and online communications supported by the 'on the ground' visitor infrastructure.

The core structure of the ITT will be based around 'always on' experiences supported by regularly scheduled immersive experiences. It will facilitate the inclusion of other visitor attractions and outlets linked to the theme and destination. Additional experiences and events will subsequently feed into the ITT platform such as annual stallion day trails, trainers' yards, Farriery experience and R.A.C.E. experience days. Cross-cutting experiences such as food, drink and retail will be layered to the ITT to develop a greater density of year-round experiences. It will reflect how all members of the tourism network can embrace a new destination development approach.

The ITT is designed to ensure a collaborative industry approach while also guiding future strategic investment in areas such as public realm, wayfinding and orientation investment.

2. Accessible Privilege – Premium Thoroughbred Experiences 'Behind the Scenes'

The daily operational approach of the thoroughbred industry highlights its natural capacity to create a range of higher value experience options with unrivalled access to the very elite of a globally recognised sports and breeding industry, which warrants a premium positioning.

This level of privileged access provides two experience development platforms.

- 1) 'Behind the Scenes' immersive experiences targeted at the leisure market and based on achieving a higher volume of visitor numbers.
- 2) Premium 'Money Can't Buy' experiences developed to target the premium luxury market. This will represent smaller volume and higher yield targeting high net worth visitors and the M.I.C.E. market.

The focus will initially be on the uniqueness of the 'behind the scenes' and privileged access progressing to delivering new experiences targeted at the luxury market. The five star accommodation base within the destination combined with accessibility to Dublin represents scope to pursue the luxury market while new experience development focused on the requirements of the MICE category will have equal importance.

However, the development of standalone experiences via a premium positioning will only result in short term gain. It will be a "whole of the thoroughbred journey" story that will deliver longer term destination gains.

B. STRATEGIC DEVELOPMENT PILLARS

The strategic development pillars tell the destination story through interconnected experiences, each aligned with achieving the 'big ideas' and the long term vision. They represent a destination development platform for all members of the tourism industry to embrace in creating the thoroughbred cluster i.e. experience development under these themes by accommodation, attractions and activities.



Strategic Development Pillar One – The Thoroughbred

Experience Development Theme – Champions to Challengers – Behind the Scenes

The thoroughbred is the story that has created the place and inspired the people. This strategic pillar focuses on the horse story from foaling to the opportunity to meet household names and global equine superstars. The development layer of "privileged access" will adopt this pillar as a key component of its development focus.

Indicative Strategic Pillar Experiences*¹

- Irish National Stud Experience.
- Fethard Horse story/Coolmore Experience.
- Mingle with the Stars (Stallion trail).
- Fall of the Hammer (Goffs).
- The Curragh Experience.
- Trainers' Yards Experience.



¹ These are indicative experiences across all four strategic development pillars. They reflect suggested experiences and is not an exhaustive list. These are suggested to be illustrative of the experience development pillar that will guide future destination development.

Strategic Development Pillar Two – Thoroughbred People

Experience Development Theme – Bred to Win – the Horse Whisperers

The word on the track, inside word and the whispers all contribute to the intrigue of the thoroughbred industry. From trainers, horse handlers, jockeys to farriers, each possess the inside story that combine to create the magic of the thoroughbred. From epic wins to close calls, visitors will access a day in the life of the people who nurture and tend to our thoroughbred heroes.

Indicative Strategic Pillar Experiences*

- The Inside Track – Expert Eyes (trainers and the gallops).
- Shoeing Champions with Farriers.
- The Saddle Makers.
- The Old Skills – RACE.

Strategic Development Pillar Three – Place and Heritage

Experience Development Theme – Home of Champions – A Global Heritage.

The thoroughbred story has evolved from folklore and legends to a place now possessing an abundance of stories embedded across every community. The delivery of this global story will be important to establishing the destination profile as a guardian of thoroughbred heritage. This strategic pillar will become a key destination orientation enabler, providing the main experience access points for the visitor.

Indicative Strategic Pillar Experiences*

- Irish National Stud Experience.
- Fethard Horse Country experience.
- International Thoroughbred Trail.
- The Curragh Plains.
- The Military Museum.
- Kildare Town.
- Newbridge Silverware Experience.

Strategic Development Pillar Four – The Winning Post

Experience Development Theme – The Rhythm of the Hoof - Classics and Jumps.

The liveliness of the track and thrill of the bet contribute to the uniqueness of a race day experience. The destination possesses a calendar of events that provide access to some of our greatest national sports occasions. The destination must embrace its key festivals through collaboration and destination innovation to add value to the visitor's experience.

Indicative Strategic Pillar Experiences*

- Punchestown National Hunt Festival.
- Curragh Derby Days and Festival.
- Champions Day Weekend – Niche Festival Development.
- Racing Days Out combined with Destination Thoroughbred Experiences.

C. CATALYST PROJECTS

Four catalyst projects have been prioritised based on their ability to contribute to the following key objectives;

1. Encourage the flow of visitors across the region.
2. Increase the experiences available to visitors to lengthen dwell time in the area.
3. Leverage the capacity of the destination to deliver unique thoroughbred experiences that create a point of international destination differentiation.
4. Provide ease of access to the destination theme and act as a hub for engagement with other cross sectoral themes e.g. food, culture.
5. Elevate to world class experience standard through a focus on the thoroughbred theme.
6. Maximise the potential of existing assets to stimulate more destination activity to increase the impact of major events.

The four catalyst projects are;

Irish National Stud Experience

The investment in a new visitor experience in the Irish National Stud has the capacity to deliver significant footfall for the destination. The focus for the Irish National Stud will be visitor growth, new experience development and becoming a key orientation hub for the thoroughbred destination cluster. The objective will be to increase economic returns through a collective approach to promote blended experiences and itineraries that result in increased dwell time among visitors.

The Curragh Experience

The Curragh Racecourse in the Curragh Plains represents a globally iconic venue, that could attract very significant levels of visitor experience innovation. From activity associated with major event days, regular behind the scenes opportunities, to immersive experiences such as meeting the trainers on the gallops, the scale and heritage of the venue offers a capacity to develop premium value experiences. As part of the proposed Curragh Experience catalyst project, the Curragh Plains must become an integral element in how it interprets the story of the place and the creation of ways for visitors to engage with the natural setting that has inspired a global industry.

Fethard Horse Country/ Coolmore

The Fethard Horse Country Experience combined with the Coolmore visit represents an iconic attraction integrating the heritage of the place with access to a world class thoroughbred story told through Coolmore. Coolmore's international status among racing enthusiasts and the general population provide the TC DEDP hero experience with an opportunity to grow significantly. The enhancement of the visitor journey and possible expansion of new experience options should be considered. This should represent the benchmark for other thoroughbred behind the scenes experiences with the capacity to link the place, people and the thoroughbred heroes.

Festivals and Events

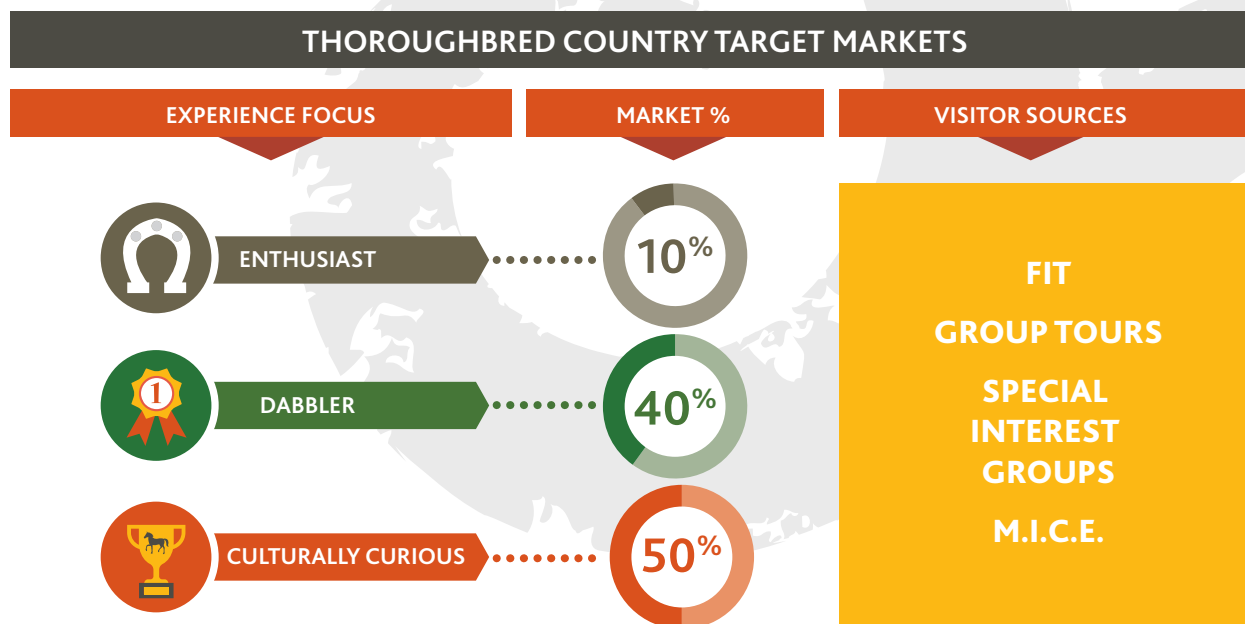
The destination hosts three major festivals/events that provide an immediate platform for destination engagement. A new focus is required to match the status of the festivals and the associated economy opportunities that each represent. A longer term festival plan is required to provide a cohesive approach to engaging the destination with the festivals opportunity, initially focusing on the core communities and host towns with a medium to longer term focus on developing the broader community based platform. The festival approach must be developed through a "whole of destination" approach linking accommodation and attractions to the festival delivery.

01 KEY RESULT AREAS AND TARGETS



1.1 KEY RESULT AREAS AND TARGETS

The overarching objective of the TC DEDP is to sustainably increase the economic benefit of tourism to the area. The plan is structured to develop a product and experience base that is motivational for a number of key audiences, starting with the enthusiast i.e. the existing horse racing segment. However, the sustained impact will be achieved through the ability to become significantly motivational to attract increased levels of culturally curious visitors and 'dabbler' segments. The 'dabbler' group represent visitors, domestic and international with a degree of interest in the equine theme or sports followers with a level of awareness of the thoroughbred and horse racing.



Specific KPIs will be baselined and monitored throughout the lifecycle of the plan. The impact of the TC DEDP will be measured through key metrics assessing the commercial development of tourism across the area.

The TC DEDP framework adopts the V.I.C.E. model as a means of measuring sustainable impact. The VICE Framework identifies sustainable tourism as the interaction between Visitors, the Industry that caters for them, the Community and culture that hosts them and their collective impact on and response to the Environment where it all takes place.

1.2 KEY PERFORMANCE INDICATORS

The measurement of success will include analysis of the following areas of performance over the course of the TC DEDP.

1. Demand side conditions
2. Supply side conditions
3. Destination development
4. Environment

An DEDP Impact Measurement Model has been devised to assess the destination return on investment measuring performance across key outputs areas such as attractions, new experiences and industry development. The impact measurement approach is designed to capture the performance of the plan across three experience layers. This includes sustained destination development together with specific thoroughbred experiences that represent the key access points for the thoroughbred theme.

The uniqueness of the experiences delivered through the 'accessible privilege' experience category will be key destination differentiators in the development of a globally unique visitor proposition. They will be assessed to measure both increased visitor value and additional visitor numbers generated for the target areas.

The four areas of measurement to assess the impact of the TC DEDP are;

1. MEASURING OUR INVESTMENT IMPACT



Growth in
visitor
numbers



Spend across
fee paying
attractions



Visitor
footfall to non
fee-paying
attractions

2. MEASURING EXPERIENCE PERFORMANCE GROWTH



Experience
return on
investment



Members of
tourism industry
adopting the TC
DEDP with high
growth potential
or strongly
aligned with the
themes and target
sectoral clusters



KPIs: Annual tracking of
visitor numbers, season
extension, new
experiences created,
employment indicators

3. KEY ACCOUNTS



Performance of
key accounts who
are engaged with
the International
Thoroughbred
Trail year-round



Stakeholders
who will deliver
'accessible
privilege'
experiences



Measuring growth
across accommodation,
attractions and
thoroughbred
experiences

4. ENVIRONMENT



Central focus on
effective
management of the
environment,
including natural,
cultural and
heritage assets



02 SETTING THE SCENE

2.1 DESTINATION EXPERIENCE DEVELOPMENT PLANS AND THEIR OBJECTIVES

A Destination Experience Development Plan (DEDP) is a five year development plan for an area. The key objectives are as follows:

- Ensure the local experiences are brought to life through the development of the optimal mix of hero and ancillary products that get people into the area and retain them.
- Unlock the economic growth potential of an area by progressing a range of key initiatives that will motivate and facilitate potential tourists to visit and stay in the local area.
- Develop a sustainable basis for commercial development centred on creating strong signature, supporting and ancillary experiences that are commoditised through the creation of saleable experiences that excite consumers and buyers alike.
- Create the conditions to encourage international visitors to immerse themselves actively in the locale, interact with local people engaging the senses by immersing themselves in the destination.
- Strengthen the value of tourism to the local community by providing employment opportunities.
- Provide a coherent approach to destination recovery post COVID-19 through a focus on the short term projects while also retaining a medium to longer development approach

Ireland's Experience Brands are at the heart of 'Tourism Brand Ireland'. They bring it to life, create the motivation for visitors to visit the Island of Ireland by defining its diverse character in a way potential visitors will understand. The Experience Brands provide the competitive advantage that separates Ireland from its competitors.

An Experience Brand therefore must be unique enough to stand out in the international marketplace and stimulate demand. Each Experience Brand must have a clear consumer proposition which ensures that a consistent approach is taken to the identification and development of memorable tourism experiences within these brands. They must also be distinctive in the international marketplace and differentiate itself from other Experience Brands within the Island of Ireland and in other destinations.

An Experience Brand must:

AN EXPERIENCE BRAND MUST:



Be grounded in the consumer (travel values, social values, behaviours).



Be motivational for international visitors.



Be of scale - made up of a critical mass of related attractions and supporting experiences which are purchasable and accessible and supported by appropriate tourism infrastructure.



Be more than one experience-usually a combination of supporting experiences underpinning one or two lead experiences.



Be unified by a compelling story which has international relevance.



Be capable of increasing dwell-time and/or driving economic benefit.



Have a consumer led proposition, values, and theme(s).



Be market-led and tested.

Developing a visitor experience is about delivering life enhancing moments that inspire visitors to share their experiences with others and make them want to return. To achieve international cut-through in today's 'sharing economy', experiences need to utilise thematic interpretation techniques that evoke a positive emotional response in visitors.

Fáilte Ireland's Business Tourism Unit works in partnership with Tourism Ireland and Tourism Northern Ireland to develop Ireland's full potential as a business tourism destination. With an international remit, the focus is to encourage and support both Irish and International businesses to host their International Association Conferences, Corporate Meetings and Incentive Trips in Ireland.

2.2 IRELAND'S ANCIENT EAST OVERVIEW

"When you explore Ireland's Ancient East, you wander through 5,000 years of history. In these lush, green lands, tales of feuding dynasties hide behind crumbling Gothic architecture; ghostly tombs predate the pyramids; and knights, kings, monks and Vikings loom large in incredible stories." The TC DEDP sits within the Ireland's Ancient East proposition focused on Kildare and the Fethard area of South Tipperary.

Since its launch, Ireland's Ancient East has become a well-established regional experience brand. It is having significant impact on tourism, delivering increased visitor numbers and spend, season extension and creating jobs. The focus has been on developing brilliant visitor experiences with the potential to drive increased visitor numbers, incremental bed nights, and revenue across the region.

In 2019, 16 new interactive experiences opened across the region following funding of over €2.1 million as part of our Storytelling and Interpretation investment scheme, with two additional due to open in 2020. A new Destination Towns Capital Investment Programme was also created to enable every Local Authority apply for funding of up to €500,000 to develop towns across the country.



Continued investment in tourism is critical for Ireland's Ancient East to stand out in the international marketplace, particularly when tourism trends are evolving rapidly. Throughout the past number of years, the Ireland's Ancient East team worked closely with tourism businesses to progress new Destination Development Plans for the region.

Some notable achievements to date include;

- Over €29m invested in attractions to date
- Working on projects with potential to deliver over €35m in value over the next 3 years
- 10 projects with Strategic Partners Office of Public Works (OPW) and Coillte
- 16 new and improved visitor experiences across the region through the Ireland's Ancient East Storytelling and Interpretation investment scheme
- Match funding for 3 projects under the Rural Regeneration and Development Fund
- Historic Towns signage - 5 towns completed with 85 Visitor Orientation map and story boards installed
- Fáilte Ireland will invest up to €7m through the local authorities located in Ireland's Ancient East to boost the attractiveness and tourism appeal of towns across the region. This scheme is part of the National Tourism Development Authority's work to drive a better regional spread of overseas and domestic visitors and spend.

2.3 HOW THE PLAN WAS DEVELOPED

The TC DEDP was developed through a programme of in destination consultation, research and international best practice review.

The research methodology employed a bespoke experience research framework, devised to examine current destination experiences, project development considerations and opportunities, industry capacity and an assessment of current distribution channels. This included group and individual consultations, workshops, mystery shopper visits, international consumer assessment, social media analysis and online reviews of the destination theme.

An analysis of international best practice was undertaken to examine comparable thoroughbred themed destinations. The core objective of the international case study review was to establish their success factors and apply the learnings to the project.

The programme of research specifically included the following;

- Hosting of a Destination Experience Development Plan workshop attended by 25 representatives of all thoroughbred and tourism industry stakeholders.
- Mystery shopper programme assessing the visitor journey from the pre-visit experience to onsite experiences.
- Visitor experience product audit across the geography of the Thoroughbred Country proposition.
- Review of online share of voice and consumer sentiment to destination through a programme of 'digital noise' assessment.
- Examination of online saleable experiences available in-destination and associated distribution channels.
- Examination of the current sales and distribution approach for the Thoroughbred Country destination experiences by international tour operators.
- Assessment of current capacity of industry in context of creating new destination visitor experiences.
- International benchmarking against comparable destinations with a similar product base and thematic approach to experiences.
- Programme of secondary research reviewing existing tourism and economic development plans.
- Series of one on one industry consultations and on site visits throughout the destination with tourism and thoroughbred industry and other key stakeholders.



03 WHERE WE ARE NOW



3.1 KEY INSIGHTS INFORMING OUR ACTIONS/ RESEARCH OVERVIEW

A programme of in-destination research was conducted to examine the current levels of thoroughbred experience provision, destination engagement with the theme and additional international case study research versus what is required to create a world class thoroughbred destination that is motivational for domestic and international visitors. The research methodology was constructed adopting a visitor / destination gap analysis.

The initial phase of the research was a destination audit designed to identify the depth of current product base and levels of engagement with existing thoroughbred experiences among the tourism industry. The audit examined existing saleable thoroughbred experiences in addition to accommodation and hospitality providers that leverage the theme for marketing and collaborative experience development. The audit did not account for race event days e.g. current calendar of racing events hosted in the destination.

The destination thoroughbred experience audit provided the basis for the subsequent phases of the research i.e. determine ease of access to thoroughbred experiences and how the existing tourism eco-system currently capitalises on the theme.

1. Mystery Shop

The mystery shop programme was undertaken adopting an international visitor context interested in exploring the Irish thoroughbred story and accessing experiences that would immerse them in a destination renowned for its equine heritage. The context was a family visiting the area who had a keen interest in horse racing and looking for a more in-depth engagement with the local equine story.

The process involved a pre-visit assessment of nine accommodation providers as access points to the thoroughbred story i.e. adopting the thoroughbred narrative to sell the uniqueness of the destination. The review of the accommodation sector was also to establish the consistency in packaging the destination and how they integrate a mix of locally accessible experiences.

Only two of the nine accommodation providers mentioned the equine connection with the destination. One hotel specifically encouraged potential visitors to consider staying in Kildare, known as the heart of thoroughbred country. Five of the nine featured Ireland's Ancient East within their websites while seven of the nine made general recommendations on what to do in the area. Four of the accommodation providers provided a direct link to a visitor attraction in the area while a number hosted a link to destination marketing groups.

The mystery shop visit focused on a number of key attractions, promoted through the top ten things to thing in Kildare and Newbridge and suggested by a destination marketing site. Only one of the experiences recommended was a saleable experience. There was no linking of the recommendations through themes or motivational reasons to consider them individually or collectively.

The website experience for the main attractions proved positive, but did not recommend additional experiences to consider when in the area. Overall, the quality of the experiences were rated as good with a strong sense of welcome and staff enthusiasm evident throughout the visits.

No visitor attractions visited by the mystery shopper provided visitors with suggestions that would encourage them to stay longer in the destination. Outside of the main visitor attractions, the mystery shopper could not locate any unique thoroughbred experiences or examine potential experiences hosted at other times in the year that would motivate them to visit again. A number of horse racing experiences appear in pre-visit searches such as The Curragh, RACE, Punchestown and the Irish National Stud, however, the Irish National Stud remains the only option providing a saleable experience the visitor can currently book to access the local thoroughbred story.

Key Observations

- There is currently no collaborative effort to promote the uniqueness of the thoroughbred story in the destination.
- The destination story being told through attractions and accommodation providers does not convey a cohesive destination narrative or sense that experiences are easily accessible to visitors.
- The current level of packaging / proposed itineraries among accommodation providers is very limited. The majority of accommodation providers did not offer easy solutions that encourage an extended stay due to the variety of experiences accessible locally.
- There is no cross selling of destination experiences while the promotion of accessible thoroughbred experiences is very limited.
- Over half of accommodation providers are currently availing of the international brand opportunity that Ireland's Ancient East provides.
- The quality of the mystery shopper interaction with the in-destination attractions was very high. There was limited cross selling of other local attractions or suggestions on what to consider next for the visitor to retain them longer in the destination. The quality of personnel encountered on the mystery shop visits was very high.
- The pre-visit element of the visitor journey does not adequately convey the scale and depth of the thoroughbred story in the destination. The current destination narrative conveys a sense of difficulty for the visitor to access experiences that reflect a globally acclaimed home to the thoroughbred.
- The tourism ecosystem is currently not aligned to the thoroughbred story despite the existence of attractions of scale aligned to the theme. The current narrative is not supporting the efforts to attract visitors to the destination for longer stays and objective of eliminating the transient visitor pattern associated with Kildare.
- The mystery shopper had a strong sense of the thoroughbred place through the public realm and placemaking around key access points to the area.
- Overall, it proved very difficult to access the people who tell the authentic thoroughbred story i.e. the people of the industry.

2. International Benchmarking

An analysis of comparable international destinations was undertaken, assessing the critical success factors that have underwritten sustained destination development through the adoption of the thoroughbred theme. A preliminary phase of international research was conducted, concluding the only comparable model demonstrating destination development best practice was Horse Country in Kentucky, USA. A number of international thoroughbred hubs were examined to establish other related tourism activity (e.g. Newmarket, France and Australia). The assessment concluded the thoroughbred tourism opportunity has not been realised in the other destinations due to a higher level of event focus with standalone attractions not integrating with other destination experiences. They also reflected a lack of a collaborative approach between the tourism industry and the thoroughbred industry.

Horse Country, Kentucky

Kentucky was already a world-renowned horse-racing destination. However, it is now positioned as the centre of equine tourism development through the establishment of Horse Country in Lexington.

Eager to build upon the established reputation of the Kentucky Derby, the Kentucky Horse Park and the enhancement of the equine tourism product, a group of industry stakeholders came together in 2015 to create a membership based not-for-profit organisation that provided behind the scenes accessibility in two thoroughbred farms and related businesses. Restructured as a one stop shop of horse farm and equine related tourism experiences, Horse Country connects its members with tour companies through a dedicated website "Visit Horse Country" that facilitates visitors with the purchase of tickets for predetermined tours or giving them the capacity to plan their own tour experiences.

Horse Country currently works with over thirty local farms, veterinary clinics, thoroughbred retraining facilities and feed mills that provide in excess of fifty different thoroughbred experiences. The horse breeders in Lexington understood the importance of reaching out to the public. However, they acknowledged that they required an appropriate way to organise a process for horse racing enthusiasts and tourists to immerse themselves in the thoroughbred story. A number of founding members came together and each donated \$10,000 to get the initiative started through Horse Country.

The collective goal was simple – offer guests unprecedented access to the inner workings of Kentucky's signature industry without creating an overwhelming burden on the businesses that were being showcased through the visitor experiences.

One of the initial challenges for Horse Country was to change the mindset that Horse Country created additional hindrance to the horse farms' day to day operations, and to build an environment to best showcase the industry facilities.

Horse Country stated that they wanted to facilitate a "sandbox we could all play in". They also acknowledged that no one's main business was tourism. However, they developed the organisation as a tool for fan engagement and that became the principal motivation for wider stakeholder adoption.

The key to their efforts was that the industry developed Horse Country collectively. It was driven by key industry players who were concerned about the state of the industry and appreciated the success of collaborative efforts that they witnessed on examination of the Kentucky Bourbon Trail success.

Standardising the quality of the experience that people received was the next logical step. Specialized staff training and external hospitality expert consultation proved to be the key ingredients in developing more Horse Country experiences.

Horse Country acknowledged that it still remains a challenge to balance interacting with guest expectations and acting as an attraction in the tourism market with the very real considerations of working farms, clinics and training facilities.

Horse Country started to develop their own best practice guidelines and suggestions but fundamentally became an enabler to allow the thoroughbred industry to choose their own schedules and when they presented their experiences throughout the calendar year. From its official launch in the Breeders Cup Festival week that was hosted in Keeneland in late 2015, the response to Horse Country has exceeded all expectations.

Some key outputs included extended stays in the destination with strong evidence of an uplift in accommodation indicators and associated growth in expenditure in restaurants and retail.

Horse Country promoted their authenticity to tourists as a predominant source of elevated attractiveness. They stated “these experiences are as authentic as it comes. This isn’t an amusement park or a fabricated attraction. This is simply our way of life. Our aim is to create emotional experiences by sharing the story of the horses, the land and the people with our guests, ultimately to develop fans of farms and clinics through tourism experiences”.

They acknowledged it as being a totally collaborative snowball effect. After it was launched and the successful outputs were shared in addition to collecting people’s perceptions of the destination, the industry acknowledged that the model was working and embraced it more thoroughly.

Key Observations

- Recognition among the thoroughbred community of the need to develop experiences for the fans of horse racing and add a new dimension to enable fans to understand the inner workings of the thoroughbred industry.
- The success of the cluster approach is based on smart specialisation with a focus on a deep-rooted thoroughbred cluster that also introduced cross-cutting sectoral activity with other tourism suppliers e.g. attractions to hospitality sector experiences.
- The success was largely due to the creation of a structure that worked with an equine industry that traditionally did not view itself as operating within the tourism sector. The structure manages supply development, demand and stimulation and provides an access point for new experiences to become part of the wider showcasing of the thoroughbred destination.
- The impact of sustained collaboration, leadership and partnership that subsequently fostered greater levels of professionalisation, capacity building and increasing industry capabilities and entrepreneurship. The thoroughbred industry is an industry grounded in high standards. This adherence to a quality ethos is reflected in experience development and the ability to develop premium experiences.
- The thoroughbred industry demonstrated a very high level of awareness of its capacity and capabilities. This fostered a continuous focus on experience development training and standards improvement across all facets of the visitor journey. This involved working with tourism and service innovation experts that raised industry expectations on the benchmark for quality and training requirements.
- Targeting the enthusiasts market represented the initial focus. However, this soon developed into a wider tourism proposition based on the experience of the Bourbon Trail that created a focal point for integrating wider destination experiences and develop the platform for cluster growth. The trail represents the key access point for the thoroughbred and tourism industry to join an integrated network and adopt a partnership approach.
- The Horse Country not-for-profit entity became the operational and organisational focal point. It addressed the issue of the thoroughbred industry not perceiving themselves operating within tourism. Furthermore, it prompted the tourism industry to increasingly integrate the thoroughbred theme into the destination profiling and increasing collaborative activity. The existence of the Horse Country “Sandbox” became the industry orientation point and the collaborative entity that ensured continuity and sustained growth in further experience development.

3. Digital Noise

Online analysis was conducted to examine the digital narrative generated by local stakeholders and how visitors portray their visit to the destination. In the context of the TC DEDP, research was confined to equine experiences. An examination of the digital activity of one major venue in the destination generated 280 posts over a period of a fortnight. None of the posts referenced the destination or tourism messaging and were solely concentrated on event day activities.

A review of a dedicated destination promotion channel included an examination of social media channel such as Twitter and Instagram in addition to blogs, forums and online news. Over the period of a fortnight, a total of 342 posts were identified, however there was no reference to equine activity or equine related tourism in the destination.

An analysis was conducted of Twitter and Instagram social media channels at a wider destination level and focused on equine tourism. A search for Kildare tourism activity on Twitter generated 117 posts with 8 being equine related while Kildare equine generated 37 posts. The impact of event days in destination resulted in 344 twitter posts linked to Kildare horse while the Coolmore tour only generated two posts. The promotion of #kildaretourism resulted in 173 Instagram posts with 19 linked to equine and race day event activity.

Key Observations

- Limited engagement in the equine and thoroughbred opportunity by all industry stakeholders use of online channels.
- Low cross promotion of sectors i.e. tourism promoting event days and event venues promoting in destination experiences to add value to the visitors' race day out.
- Absence of a collective social media narrative being adapted by all stakeholders to create destination 'stand out' through the uniqueness of the thoroughbred theme.
- Lack of sustained programming of destination themes and highlighted experiences delivered by all tourism stakeholders.



4. Industry Feedback Summary Points

- There is a collective recognition that the development of thoroughbred tourism represents a global tourism opportunity for the destination.
- Currently, there are a number of restrictions for visitors to access experiences due to daily working conditions e.g. trainers' yards. However, there is a widespread commitment to developing regular experience access.
- The thoroughbred industry widely recognise they are not in the tourism industry but willing to realise the destination ambition through commitment to their capacity and capability development.
- The thoroughbred industry is a quality experience and future experience development needs to be created with a quality focus that mirrors the equine sector reputation.
- Each tourism and thoroughbred stakeholder consulted have recognised a range of immediate areas for experience innovation.
- The hotel sector strongly advocated the need for new experiences to work with to enhance their ability to developing new packages, non-race and race day itineraries and supporting their efforts to win more MICE business.
- Long term collaboration represents the only pathway to success and all interested players must sign up to being involved and committing to quality experience delivery.
- There is a requirement for brand development to align all stakeholders.
- The thoroughbred theme has the potential to be a catalyst for extended destination product / services to provide cross-cutting sectoral opportunities e.g. food, retail.
- There is a need to create an industry focal point that will stimulate demand, encourage experience creation and manage the key operational elements such as bookings or developing new levels of industry collaboration.
- Major festivals require a new focus to reinvigorate them across the destination.
- The thoroughbred industry uniquely delivers 'behind the scenes' experiences that the majority of sports cannot provide from the opportunity to meet the equine heroes to the people who possess a global reputation for industry and sport excellence.
- There is a requirement for strong destination hubs that provide the platform for visitor orientation focused initially on Kildare and Fethard.

3.2 SITUATIONAL ANALYSIS

Strengths

- Strongly defined thoroughbred cluster geography.
- Recognised as an international thoroughbred centre of excellence and leading European thoroughbred hub.
- World-class horse racing events recognition through hosting of major horse racing festivals.
- Deep rooted equine heritage of area and the historical association with thoroughbred racing.
- Sophisticated buyers associated with the industry driving industry quality standards.
- Appeal of the sport and horseracing events to all domestic and international visitor segments.
- Strong international marketing product recognition through the thoroughbred theme.
- Accessibility to Dublin market and transport hubs.
- Footfall generated by retail outlets in Kildare.
- Capacity to create experiences at all price points from entry level to premium experiences.
- Thoroughbred industry personnel quality and their international status and world leading experts.
- Global focal point for the thoroughbred industry within the international thoroughbred eco-system.
- International footprint of the Irish thoroughbred industry creating international linkages.
- The quality of international networks accessible by the thoroughbred industry.
- International learning centre of status that currently exists among all thoroughbred horse professions.
- International quality of “hero” products from the Irish National Stud, Fethard Horse Country and Coolmore and future potential through the Curragh Experience.
- Depth of experiences that naturally link the entire thoroughbred story from foal to finishing post.



Weaknesses

- Potentially key thoroughbred experiences not engaging with the tourism opportunity and restricted engagement opportunities that have the scope to elevate the destination story.
- Existing destination assets not maximising their potential to attract and retain visitors in the area.
- Current status of the destination as a transient or day trip destination.
- Current levels of cross selling or collaboration on experiences are very limited.
- Low levels of engagement with the global thoroughbred theme as a key differentiator among the tourism industry at present.
- Poor destination engagement with major thoroughbred festivals.
- Activation of major festival activity in destination is not co-ordinated.
- Quality of pre-visit information around thoroughbred experience availability is limited.
- Low levels of existing saleable experiences adopting the thoroughbred theme.
- The accommodation base in the core destination geography linked to the thoroughbred theme is limited.
- Minimal level of visitor orientation around the destination linking thoroughbred experiences.
- The number of visitor attractions with links to the thoroughbred theme that are not fully operational to create a year-round destination.
- The challenge of managing the perception among the thoroughbred industry that they are not playing a role within tourism.
- Lack of a coherent destination brand adopted by all stakeholders focused on the thoroughbred heritage of the area and depth of global appeal.
- Not realising the potential of an organic thoroughbred cluster for competitive tourism advantage.
- No platform to link quality experiences such as the Irish National Stud with the Fethard House Country Experience.



Opportunities

- Potential to create iconic behind the scenes experiences in venues such as Goffs, The Curragh, RACE, Farriery School.
- Destination growth through the thoroughbred theme that can embrace the wider tourism industry from culture, food and retail.
- Telling the horse heritage story from foal to finish line providing a multitude of experience access points for the industry to embrace.
- Thoroughbred experiences delivered through globally recognised sites in Kildare and South Tipperary.
- Global positioning of the destination through the thoroughbred experience development.
- Development of iconic and prestige experiences that are not accessible in other destinations or sports.
- The development of the Curragh Plains as a major destination resource.
- The enhancement of the current approach to major festivals and enhancing race day experiences that can link to new in destination thoroughbred experiences that promote increased destination dwell time.
- Increased industry collaboration in the packaging of unique thoroughbred experiences.
- Creation of an international standard trail that becomes globally recognised as the best conveyor of the thoroughbred story.
- Development of Kildare town as an orientation point for the destination and thoroughbred cluster enhanced through public realm, placemaking and innovative approaches to linking the town to venues such as The Curragh i.e. walkway / trail, Kildare Village
- Development of in destination thoroughbred educational short break stays engaging with key experiences.
- Ability to grow new emerging clusters linked to the thoroughbred theme e.g. food and retail.
- Growth of supporting experiences e.g. fashion association with major festival days.
- Development of new experiences with local trainers on site and on track.
- The integration of natural resources with the thoroughbred experience e.g. greenways and walking trails.
- Opportunity to integrate existing visitor attractions into the destination story to stimulate new levels of footfall e.g. Newbridge Silverware, Kildare Heritage Centre.
- Global leadership of the thoroughbred tourism theme through the scale achieved through collective engagement.
- Development of unique early morning gallops and sunrise experiences.
- Incorporation of unique cultural venues into an annual experience schedule e.g. expert discussion events, equine cultural expos such as art and photography.
- Creation of a thoroughbred walk of fame to for placemaking and international profiling opportunities.

Threats

- Ongoing risk of global shocks as evidenced through COVID-19 and impact across all economic sectors.
- Additional uncertainty around tourism economy impact due to Brexit.
- Industry investment confidence eroded by challenges of Brexit.
- Failure to grow range and quality of destination accommodation base
- Tourism industry not adopting an increased focus around experience development to meet changing visitor demands.
- Thoroughbred industry's capacity restricted to engage with experience development due to equine health restrictions and access limitations to working farms and yards.
- Lack of integration of supporting experiences throughout the destination resulting in fragmented external perception of destination e.g. Blueways, Greenway Trails.
- Potential changes in funding models to enhance existing attractions.
- Challenges faced through climate change impacting on visitor travel patterns

3.3 KEY CONCLUSIONS BASED ON RESEARCH

Premium Experiences - Premium Industry Delivery

The composition and operational approach of the thoroughbred industry highlights its natural capacity to create a range of higher value experience options. The sector possesses the wherewithal to provide unrivalled access to the very elite of a globally recognised sports and breeding industry.

The operational context for the thoroughbred establishes a natural set of standards and expectations around quality experience delivery. The opportunity to access "behind the scenes" of this world acclaimed industry warrants a premium market positioning. The evolving destination experience narrative and associated development focus must capitalise on this premium positioning opportunity. The development of an 'accessible privilege' experience category focus provides the destination with a key experience differentiator.

However, the development of standalone experiences via this market positioning will only result in short term gain. It will be a "whole of the thoroughbred journey" story that will deliver long term destination gains. This will require the sequencing of experiences bundled together to tell an international standard thoroughbred story. It necessitates a development ethos around quality, immersive experiences aligned with the accessible privilege theme. The opportunity for the tourism and thoroughbred industries to co-create the thoroughbred journey will create the long term destination differentiation, providing a platform for continuous innovation.

Growth Through Cluster Innovation

The density of thoroughbred experiences in Kildare combined with the South Tipperary area of Fethard/Coolmore provides the optimum model for cluster development. The geographic proximity and international resonance of these areas as industry centres of excellence create the natural conditions for cluster development. It possesses a number of 'hero' sites that represent potential cluster hubs and key access points for visitors.

Cluster development will require a scaling of saleable experiences through a smart specialisation approach. This will provide a platform for innovation intensity around the thoroughbred theme and the journey from stud farm, trainers yard to the finishing post. Through this, economy growth can be achieved while also fostering a continuous growth and innovation mindset among the industry. It will require a greater level of experience density within the cluster to achieve the longer term through a networked, collaborative and partnership approach.

Creating an International Focal Point – International Thoroughbred Trail

Currently the tourism proposition across the destination is fragmented with no sense of product depth to enable the visitor to have a more immersive engagement with the thoroughbred theme. The thoroughbred experience is difficult to access and not central to the destination development focus. It requires the creation of an access point that will link existing and emerging experiences for visitors.

The creation of a destination thoroughbred trail linking experiences across the core destination area, linked to the Fethard Horse Country experience, will provide an extended visitor orientation focus. Equally important, it will provide an engagement mechanism and development focus for the tourism industry. The trail must be anchored by strong core attractions and experiences with hub towns as key access points e.g. Kildare and Fethard. It will also facilitate the delivery of scheduled experiences and events throughout the year.

The trail should represent the catalyst for destination innovation delivering the strategic goals of industry development, new experience creation and destination competitiveness. It must become international in its outlook and reflect the quality of the thoroughbred story incorporated into all future activity from brand development to place making and visitor orientation.

Destination Capacity Development

The various elements of the TC DEDP research highlighted a number of gaps in the destination's collective approach to the thoroughbred theme. The adoption of the Ireland's Ancient East proposition by accommodation providers highlights how the industry can embrace destination development initiatives. However, the analysis suggested greater levels of focus are required across all industry segments to work in partnership with established experiences and capitalise on the thoroughbred opportunity. It will also require a new approach to experience packaging and distribution in order to yield destination success.

The creation of the cluster model and an increased focus on collaboration provides an immediate development strategy to embrace. The ability to attract and retain visitors will require a new capacity building focus to address the fundamentals throughout the destination (i.e. across the entire visitor experience journey from pre to post visit). Similarly, a new saleable experience development focus will be a necessity that can also foster increased levels of industry networking, cross selling and innovative approaches to packaging. New levels of theme related innovation and entrepreneurship will be required to deliver the destination ambition.

Thoroughbred Tourism Leadership – a Charter for Success

The TC DEDP has identified a global tourism opportunity built upon a credible thematic and geographic cluster. The thoroughbred industry continues to display international leadership while continuously achieving new sectoral standards. This must be reflected in the delivery of new and enhanced thoroughbred tourism experiences. It requires leadership across the tourism and thoroughbred industries in association with the wider stakeholder base.

The creation of a Thoroughbred Tourism Charter should be strongly considered and led by the stakeholders committed to achieving the destination vision. This must represent the first stage in the delivery of the TC DEDP through a new partnership model and a statement of intent to realise this global opportunity.

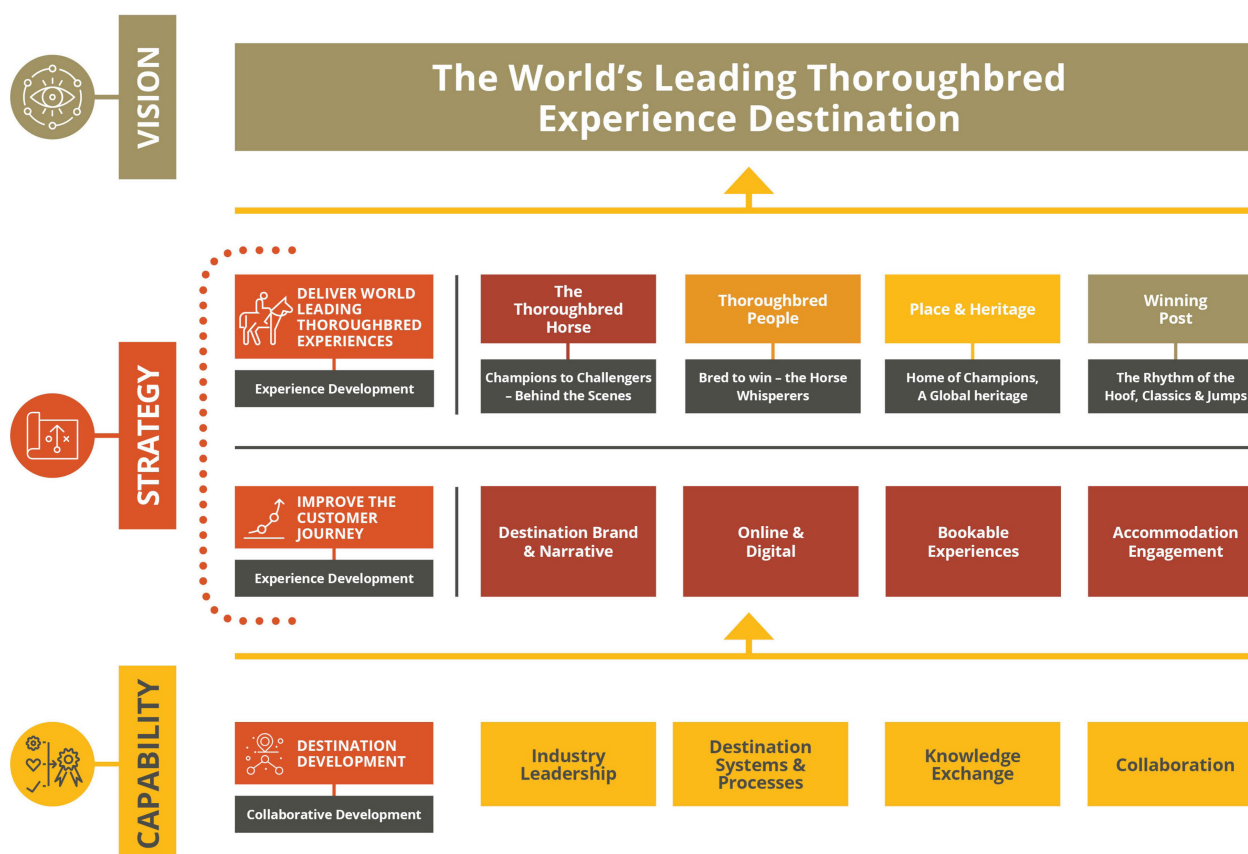


04 THOROUGHBRED COUNTRY DESTINATION EXPERIENCE DEVELOPMENT PLAN

4.1 PLAN FRAMEWORK

The TC DEDP represents a five-year destination development plan. The longer-term vision is to become the world's leading thoroughbred experience destination by 2030.

The strategic focus for the TC DEDP is centred on increasing experience supply levels and stimulating associated demand realising strong economic dividends for the destination. It is based on growing destination value through growing the range and value of thoroughbred experiences available.



The plan is built upon making the story accessible to the visitor through a range of development layers that represent access points to the thoroughbred experience.

Layer 1: Destination Story – The development of a destination cluster and thoroughbred theme told through the destination network of attractions, activities, accommodation, food and drink, placemaking, festivals and events.

Layer 2: The Thoroughbred Story – Core cluster thoroughbred theme access points that attract visitors becoming central to orientating visitors across the destination.

Layer 3: Accessible Privilege – Development of unique and premium 'behind the scenes, money can't buy' thoroughbred visitor experiences.

These experience development layers start with the enhancement of the destination story told through the thoroughbred theme. This represents the broadest scale of industry activity to ensure the thoroughbred story reaches the entirety of the tourism sector and becomes integrated across all future activity from

place making, master planning, industry development to the adaption of the thoroughbred theme into existing experiences.

This destination development layer provides the industry and stakeholders with a gateway to embrace the TC DEDP opportunity and adopt a destination wide approach through a collaborative platform. As the development layers progress, the delivery of the thoroughbred story becomes more central to the visitor engagement. The quality of the visitor experience at the Irish National Stud and Fethard Horse Country provides the central link between the destination and new and emerging experiences. They each represent an orientation layer for the visitor to delve deeper into the destination. The thoroughbred story will become the key attractor into the destination through these attractions and other attractions with high levels of footfall e.g. Kildare Village and Newbridge Silverware. Equally, they must become hubs for visitors to access the wider thoroughbred destination experience and orientate visitors between each of the experience layers i.e. destination experiences through to accessible privilege.

The ability to create prestige experiences becomes most evident when the uniqueness of the range of experiences are considered. These are categorised as 'accessible privilege'. This is the experience platform where new and developing visitor experiences provide "behind the scenes, money can't buy" access to the inner workings of the thoroughbred industry, from foaling to the finishing line.

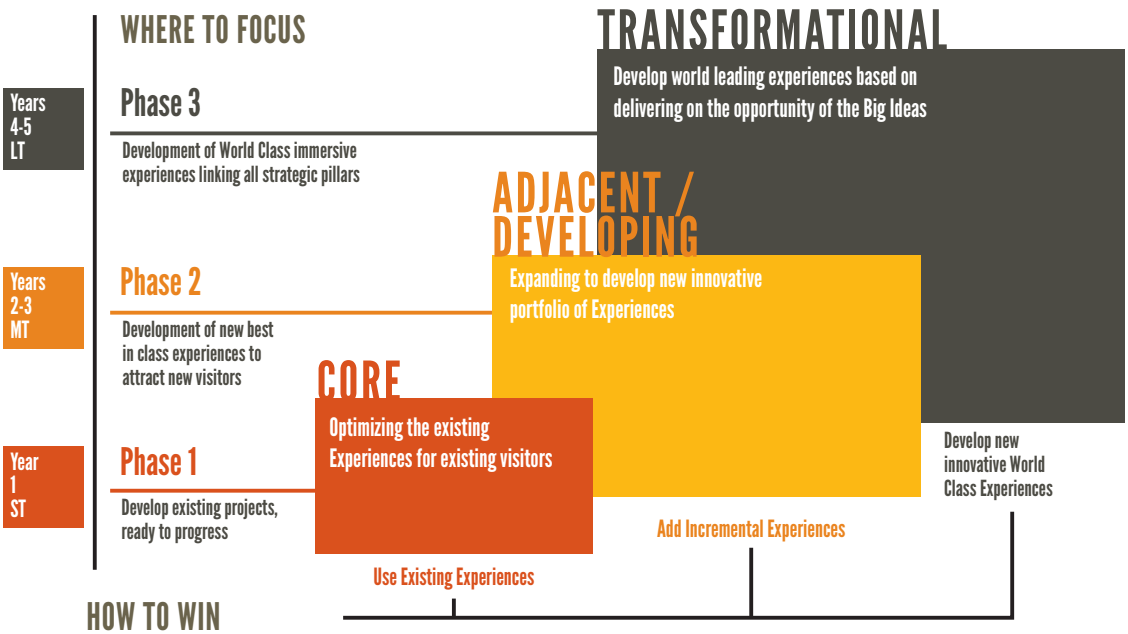
The creation of the accessible privilege layer provides the opportunity for the development of higher value experiences but also demonstrates the destination's capacity to create globally iconic thoroughbred experiences. Accessible privilege will create sustained destination differentiation. However, it will only function effectively if the supporting layers deliver on their capacity to attract visitors through motivational experiences and blended itineraries across the destination. The packaging of the experiences across each of these development layers will form the basis for sustained destination success.

The strategic approach adopted within the TC DEDP addresses a number of key fundamentals. Underpinning the new destination supply and demand focus will be the enhancement of the destination capabilities to manage growth and work collaboratively to support ongoing development. It requires new levels of collaboration and leadership while increasing the capacity of all stakeholders to develop experiences that are motivational for all target visitor segments.

The strategic focus for experience development is to deliver world leading thoroughbred experiences, that reflect the status of a globally renowned sector. This will be achieved through a development approach guided by four strategic pillars focusing on the thoroughbred horse, thoroughbred people, the place and delivering best in class destination events linked to major horse racing festivals and event days. The development pillars focus on the entirety of the journey of the thoroughbred and the people and places associated with this world leading industry.

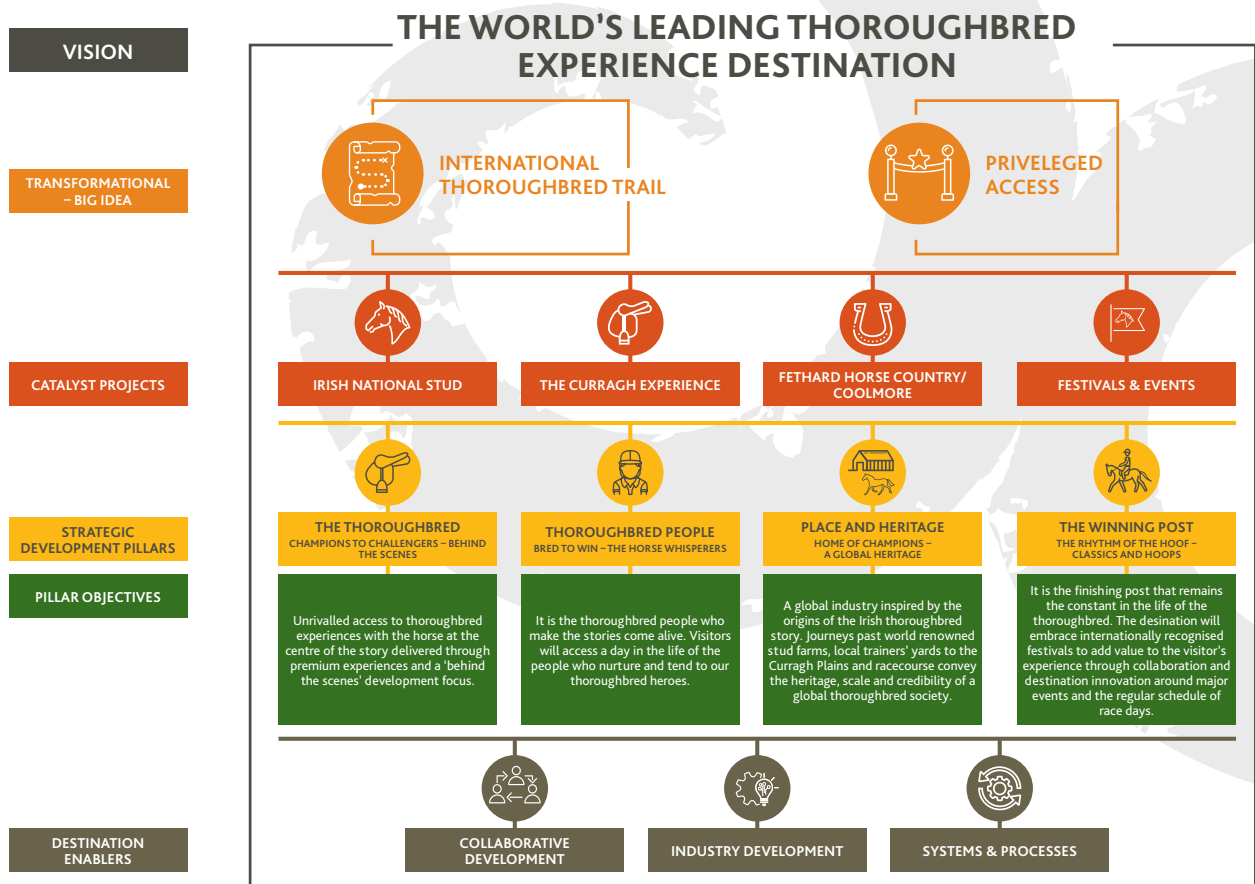
4.2 THOROUGHBRED COUNTRY DESTINATION DEVELOPMENT APPROACH

The destination development approach is based on a number of integrated layers of activity. Each area of focus is aligned with the achievement of the vision for the destination and delivering on the 'big ideas'. These represent two projects that enable wide tourism engagement with the theme while developing strongly differentiated experiences not accessible in other destinations. It is designed to build on the inherent destination strength to create sustainable points of difference delivered through a collective industry approach.



In order to achieve the strategic objectives of the TC DEDP, the development framework is structured around three interdependent layers of activity. They include;

- A. Achieving the 'Big Ideas' - Transformation delivered through catalyst projects.
- B. Strategic Development Pillars - Create the conditions for Experience Development (Developing New Experiences).
- C. Destination Enablers (Developing the Core).



A. Achieving the Big Ideas – Transformational

The destination projects that have been identified as the 'Big Ideas' have the capacity to be transformational in enhancing experience delivery, grow visitor numbers and disperse visitors across the target geography. The two concepts are designed to provide a collaborative platform for all members of the tourism industry to engage with and build upon the uniqueness of the thoroughbred story and its global association with Ireland. The two areas of focus are the creation of an International Thoroughbred Trail with a year-round destination experience focus. Secondly, the thoroughbred story offers a unique 'behind the scenes' opportunity that most sectors and sports can't offer. This will be developed through a premium experience focus known as Accessible Privilege.

1. International Thoroughbred Trail

The richness of the national and destination thoroughbred story requires a multi-faceted approach to deliver a globally iconic thoroughbred trail. The creation of the International Thoroughbred Trail (ITT) must strive for an international positioning, combining a mix of experiences that reflect Ireland's status within the international thoroughbred story. The creation of an international thoroughbred trail must be viewed as the central platform for destination development, embracing the thoroughbred cluster of Kildare and South Tipperary. The ITT will provide a visitor orientation focus around the destination while enabling the local tourism industry to embrace the international positioning through the thoroughbred theme.

It will remove the destination focus on key 'event' days to become a year-round engagement platform for industry development, destination marketing and visitor flow across an extended range of experiences to increase dwell time. The ITT will manifest itself through new experience development working with existing experiences, online communications supported by the 'on the ground' visitor infrastructure expected from a world class trail introducing visitor to world class experiences.

The ITT will be developed through a core of year-round accessible thoroughbred experiences. This core structure of the ITT will be based around 'always on' experiences supported by regularly scheduled immersive experiences e.g. Curragh Gallops with trainers accessible at an agreed number of times per year working with the permanently accessible year-round trail, e.g. "core tenants" of the trail including The Irish National Stud, Fethard Horse Country and the Curragh Experience. It will facilitate the inclusion of other visitor attractions and outlets linked to the theme and destination i.e. Newbridge Silverware, Kildare Village. The ITT will be a combination of each of the cluster experience layers (e.g. destination experiences to accessible privilege) to create the overall conditions required to achieve a world class trail proposition.

Additional experiences will subsequently feed into the ITT platform such as annual stallion day trails, trainer's yards, Farriery experience and R.A.C.E. experience days. Cross-cutting experiences such as food, drink and retail will be layered to the ITT to develop a greater concentration of year-round experiences. This will include working with local attractions to co-create new experiences e.g. regularly scheduled thoroughbred saleable experiences / events hosted in venues such as Newbridge Silverware.

This ITT is designed to create a collaborative industry model while also guiding future strategic investment in areas such as public realm, wayfinding and orientation investment. It must be reflected in future destination branding and inspire the core and supporting thoroughbred experiences to innovate to achieve the collective goal of attracting and retaining visitors.

The creation of an international thoroughbred trail must be anchored by strong core attractions and experiences within hub towns that will represent key access points e.g. Kildare and Fethard. The ITT should represent the catalyst for destination innovation and become international in its outlook while reflecting the quality of the Irish international thoroughbred sector positioning.



Project Priorities

- Development of International Thoroughbred Trail accessed through year-round thoroughbred experiences while also integrating cross-cutting destination experiences e.g. food, heritage.
- Adoption of the International Thoroughbred Trail by destination stakeholders for inclusion into place making plans and visitor orientation activity.
- Increase the capacity of the thoroughbred industry to develop regularly available experiences linked to an International Thoroughbred Trail calendar of activity.
- Development of online and in-destination infrastructure to support the creation of a world class thoroughbred trail.

2. Accessible Privilege – Premium Thoroughbred Experiences 'Behind the Scenes'

The operational approach of the thoroughbred industry highlights its natural capacity to create a range of higher value experience options. The sector possesses the wherewithal to provide unrivalled access to the very elite of a globally recognised sports and breeding industry. The combination of accessible experiences featuring the horse legends themselves, along with internationally revered industry figures, presents an opportunity very few industries and sports can provide. In addition to the experiences at the Irish National Stud, Fethard Horse County / Coolmore resources such as R.A.C.E. and Goffs offer unique insights into elements of the thoroughbred story not readily accessible. Trainers from small farm-based operations to globally connected training yards offer very unique perspectives for visitors.

This level of privileged access provides two experience development platforms.

- 1) **'Behind the Scenes'** immersive experiences targeted at the leisure market and based on achieving a higher volume of visitor numbers.
- 2) **Premium 'Money can't Buy'** experiences developed to target the premium luxury market. This will represent smaller volume and higher yield targeting high net worth visitors and the M.I.C.E. market.

The combination of quality experience positioning, world class reputation and an ability to deliver "money can't buy" type experiences, provides an immediate development opportunity around the creation of premium and added value experiences. The development focus will concentrate initially on the uniqueness of the 'behind the scenes' and privileges access progressing to delivering new experiences targeted at the high end of the luxury market. The five star accommodation base within the destination combined with the accessibility to the Dublin market represents an immediate opportunity to pursue the luxury market while new experience development focused on the requirements of the MICE category will have equal importance.

The operational context for the thoroughbred establishes a natural definition of standards and expectations around quality experience delivery. The opportunity to access "behind the scenes" of this world acclaimed industry warrants a premium market positioning. The evolving destination experience narrative and associated development focus must capitalise on this premium positioning opportunity. The development of an 'accessible privilege' experience category focus provides the destination with a key experience differentiator.

However, the development of standalone experiences via this market positioning will only result in short term gain. It will be a "whole of the thoroughbred journey" story that will deliver longer term destination gains. This will require the sequencing of experiences bundled together to tell an international standard thoroughbred story. It necessitates a development ethos around quality, immersive experiences aligned with the accessible privilege theme. The opportunity for the tourism and thoroughbred industries to co-create the thoroughbred journey will create the long term destination differentiation, providing a platform for continuous innovation.

Project Priorities

- The development of a premium saleable experience development platform focused on members who are aligned with a Thoroughbred Tourism charter.
- Development of experiences targeted at the Luxury and MICE market.
- Development of experiences targeting the leisure market adopting privileged access as a development theme.

B. STRATEGIC DEVELOPMENT PILLARS

The strategic development pillars are created to tell the destination story through interconnected experiences each aligned with achieving the big ideas and long term vision. They are structured around the key components of the destination story and how each element can contribute to a global positioning for the destination under this thematic specialisation. Excellence in experience delivery will be at the core of all future development activity, matching the equine industry ethos and lived daily by all involved in the thoroughbred story.



Strategic Development Pillar One – The Thoroughbred

Experience Development Theme – Champions to Challengers – Behind the Scenes

The thoroughbred is the story. It has created the place and inspired the people. The thoroughbred industry has a unique sports and cultural opportunity to bring horse racing enthusiasts to the culturally curious into the world of the thoroughbred through unrivalled access. This strategic pillar focuses on the horse story from foaling to the opportunity to meet household names and global equine superstars. It is designed to create unrivalled thoroughbred experiences with the horse at the centre of the story. The experience development layer of “privileged access” will adopt this pillar as a key component of its development focus. This strategic pillar is designed to create an ease of access to the thoroughbred story while also facilitating the creation of premium and prestige experiences through a ‘behind the scenes’ development focus.

Indicative Strategic Pillar Experiences*²

- Irish National Stud Experience.
- Fethard Horse story/Coolmore Experience.
- Mingle with the Stars (Stallion trail).
- Fall of the Hammer (Goffs).
- The Curragh Experience.
- Trainers' Yards Experience.

Strategic Development Pillar Two – Thoroughbred People**Experience Development Theme – Bred to Win – the Horse Whisperers**

The word on the track, inside word and the whispers all contribute to the intrigue of the thoroughbred industry. It is an industry defined by quality constantly striving for excellence. "Horse Whisperers" and their capacity to create greatness through to the horse craft of the equine trades each form part of the dense eco system of global stars and elite performers that exist across the destination. From trainers, horse handlers, jockeys to farriers, each possess the inside story that combine to create the magic of the thoroughbred. It is the thoroughbred people who make the stories come alive. From epic wins to close calls, visitors aspire to access a day in the life of the people who nurture and tend to our thoroughbred heroes.

Indicative Strategic Pillar Experiences

- The Inside Track – Expert Eyes (trainers and the gallops).
- Shoeing Champions with Farriers.
- The Saddle Makers.
- The Old Skills – RACE.

Strategic Development Pillar Three – Place and Heritage**Experience Development Theme – Home of Champions – A Global Heritage**

A global industry inspired by the origins of the Irish thoroughbred story. The sense of place invokes pride and the rightful claim to a global footprint. Journeys past world renowned stud farms, local trainers' yards to the Curragh Plains and racecourse convey the scale of the thoroughbred story. It is a story that has evolved from folklore, legends and High Kings to a place now possessing an abundance of stories embedded across every community. From the origins of the turf club to the equine story behind the establishment of Newbridge Silverware, the destination story is the thoroughbred story. The delivery of this global story will be an important element in establishing the destination profile as a guardian of thoroughbred heritage. This strategic pillar will become a key destination orientation enabler. It will provide the main experience access points for the visitor, linking the destination to the thoroughbred story and emerging premium experiences offering behind the scenes access, only the thoroughbred industry can provide.

² These are indicative experiences across all four strategic development pillars. They reflect suggested experiences and is not an exhaustive list. These are suggested to be illustrative of the experience development pillar that will guide future destination development.

Indicative Strategic Pillar Experiences

- Irish National Stud Experience
- Fethard Horse Country experience.
- International Thoroughbred Trail.
- The Curragh Plains.
- The Military Museum.
- Kildare Town.
- Newbridge Silverware Experience.

Strategic Development Pillar Four – The Winning Post

Experience Development Theme – The Rhythm of the Hoof - Classics and Jumps

The colour, noise, talk of the track and the thrill of the bet collectively contribute to the uniqueness of a race day experience. It is the race day and the finishing post that remain the constant in the life of the thoroughbred. The roar of the race days transmits the energy of the place. The destination possesses a calendar of events that provide access to some of our greatest national sports occasions. These events, from major festivals to regularly hosted race days can be amplified to enhance their impact on the destination. The destination must embrace its key festivals to add value to the visitor's experience. They each possess the potential to be significant catalysts for growth. This will be achieved through collaboration and destination innovation instilling a destination pride in these major festivals and realising the significant economic opportunity each represents for local communities.

Indicative Strategic Pillar Experiences

- Punchestown National Hunt Festival
- Curragh Derby Days and Festival
- Champions Day Weekend – Niche Festival Development
- Racing Days Out combined with Destination Thoroughbred Experiences.

C. Catalyst Projects

Four catalyst projects have been prioritised based on their ability to contribute to the following key objectives in the development of the destination;

1. Encourage the flow of visitors across the region.
2. Increase the number of experiences available to visitors to lengthen dwell time in the area.
3. Leverage the capacity of the destination to deliver unique thoroughbred experiences that create a point of international destination differentiation.
4. Provide ease of access to the destination theme and act as a hub for engagement with other cross sectoral themes e.g. food, culture.
5. Elevate to world class experience standard through a focus on the thoroughbred theme.
6. Maximise the potential of existing assets to stimulate more destination activity to increase the impact of major events.

The four catalyst projects are as follows;

1. Irish National Stud Experience

The investment in a new visitor experience in the Irish National Stud has the capacity to deliver significant footfall for the destination. The focus for the Irish National Stud will be visitor growth, new experience development and becoming a key orientation hub for the thoroughbred destination cluster. The Irish National Stud represents a major destination “access” hub through its proven capacity to attract groups and individuals. The strategic objective will be to increase economic returns for the destination achieved through a collective approach, working with other experiences to promote blended experience and itineraries that result in increased dwell time by visitors.

Catalyst Project Priorities

- Expansion of range of experiences up to prestige level.
- Collaboration with other experiences to co-create an extended thoroughbred destination experiences.
- Key thoroughbred theme access and destination orientation point model.

2. The Curragh Experience

The Curragh Racecourse located in the Curragh Plains represents a globally iconic venue. It provides a platform for very significant levels of visitor experience innovation. It can deliver a vast range of potential experiences from activity associated with major event days, regular behind the scenes opportunities to immersive experiences such as meeting the trainers on the gallops. The scale and heritage of the venue offers a vast platform to create a wide range of experiences and capacity to develop premium value experiences. As part of the proposed Curragh Experience catalyst project, the Curragh Plains must become an integral element in how it interprets the story of the place and the creation of new ways for the visitor to engage with the natural setting that has inspired a global industry.

Catalyst Project Priorities

- Creation of a range of saleable experiences that are readily accessible and bookable including premium prestige experiences.
- Development of pre festival event experiences that deliver accessible privilege experiences e.g. Derby Week breakfast experiences.
- Examine a regular provision of trainers on the gallops type experiences that support an annual calendar of accessible privilege experiences for the destination.
- Support the Curragh Plains Master Plan with the delivery of supporting thoroughbred heritage experiences.
- Examine the opportunity to create a walking trail from Kildare town to the Curragh, differentiated through the thoroughbred theme.

3. Coolmore/Fethard Horse Country

The Fethard Horse Country Experience combined with the Coolmore visit represents an iconic attraction integrating the heritage of the place with access to a world class thoroughbred story told through Coolmore. The international status of Coolmore and its level of recognition among racing enthusiasts and the general population, provide the TC DEDP hero experience with an opportunity to grow significantly. The recommendation is mindful of the Coolmore operating environment and the limitations that may exist around visitor numbers. However, as a thoroughbred visitor experience blended with the Fethard Horse Country attraction, it delivers access to a world class thoroughbred environment. The enhancement of the visitor journey and possible expansion of new experience options should be considered to deliver a world class story told through an international standard experience. The Coolmore experience should represent the benchmark for other thoroughbred behind the scenes experiences with the capacity to link the place, people and the thoroughbred heroes.

Catalyst Project Priorities.

- Enhancement of the Fethard Horse Country/Coolmore visitor journey to deliver a quality experience matching the creation of a world class thoroughbred visitor experience.
- Examination of the Fethard Horse Country/Coolmore experience to deliver new scalable visitor experience (in terms of value and volume).
- The development of a collaborative experience model linking Fethard Horse Country/Coolmore with other thoroughbred network experiences delivered at a comparable quality.
- Examine linkages to other key sites in the destination such as the Rock of Cashel to promote longer stays in the destination.

4. Festivals and Events

The destination hosts three major festivals / events that provide an immediate platform for destination engagement. The current approach requires a new focus to match the status of the festivals and the associated day and evening economy opportunities that each represent. A longer term festival plan is required to provide a cohesive approach to engaging the destination with the festivals opportunity. The approach should initially focus on the core communities and host towns with a medium to longer term focus on developing the broader community based platform to align with the festival opportunity. The festival approach must be developed through a "whole of destination" approach linking accommodation and attractions to the festival delivery.

Catalyst Project Priorities

- Development of a Five-Year collaborative festival plan prioritising the Derby Festival, Punchestown Festival.
- Examine the development of a niche destination festival / event to link with the Champions Weekend highlighting niche thoroughbred experiences across the destination and possible cross sector collaboration i.e. fashion, food, culture.
- Re-examine the opportunity to re-introduce the Fair of the Furze festival as a niche destination festival supporting the thoroughbred story in the Curragh Plains.
- Development of linkages with Privileged access/premium experiences to maximise the event day experience for the destination.





05 DELIVERING THE PLAN

5.1 PLAN IMPLEMENTATION

The implementation of the TC DEDP is based on stakeholder commitment to project delivery. Key stakeholders will collectively partner on the delivery of the key tasks required to implement the TC DEDP. It represents a five-year operational plan creating a destination development focus for the 'Thoroughbred Country' thoroughbred region.

The TC DEDP is designed to build on existing project plans and integrate all related activity for a coordinated series of outputs. These include projects that are being implemented, projects featured in existing plans and new concepts to build the destination's capacity for new visitor experience development.

The implementation phase is structured around an action plan approach. The framework adopts the VICE model as a means of measuring success and is applied to the operational framework for the TC DEDP. This includes the measurement of projects that will enhance tourism industry capacity development, experience creation and enhancement, catalyst and destination enabling projects.

A list of actions relating to all proposed projects and strategic pillars actions has been devised. All stakeholders will be consulted in relation to the delivery of the identified actions. Each of the stakeholders listed below have been tasked with delivering on actions which will help to shape the plan and ultimately ensure the success of the project over the next five years.

ACRONYM	STAKEHOLDER
FI	Fáilte Ireland
KCC	Kildare County Council
TCC	Tipperary County Council
NS	Irish National Stud
FHCE	Fethard Horse Country Experience
CR	Curragh Racecourse
IK	Into Kildare
HRI	Horse Racing Ireland
PRC	Punchestown Racecourse
NR	Naas Racecourse
IHF	Irish Hotel Federation
PS	Private Sector
DD	Department of Defence
NBS	Newbridge Silverware
GTS	Goffs Thoroughbred Sales
IFS	Irish Farriery School
KV	Kildare Village
RACE	Racing Academy and Centre of Education
TTLG	Thoroughbred Tourism Leadership Group
DVAN	Destination Visitor Attractions Network
ITM	Irish Thoroughbred Marketing
CTLP	County Kildare Leader Partnership
LEO	Local Enterprise Office
KWETB	Kildare Wicklow Education and Training Board
TFI	Transport for Ireland
TT	Tipperary Tourism

GUIDING PRINCIPLES

To ensure the successful implementation of the TC DEDP experiences, the following guiding principles have been established to guide certain recommendations and projects listed in this section.

- All projects are self-sustainable, meaning they have access to capital and are not relying solely on grant aid to be developed or maintained.
- All projects are on-message with the TC DEDP experiences and aligned to the broader mission of the Ireland's Ancient East proposition and brand.
- All projects focus on setting the area apart from its competitors, contributing actively to creating a strong sense of place with a unique feel; and ensuring visitor needs are catered for across the day and evening time.
- All projects add value to the area and provide a direct and demonstrable link to either extending visitor length of stay, extending the length of the tourist season or developing a new market.
- Principles of responsible tourism development are embedded in each action, creating better places to live in and to visit.
- All stakeholders will demonstrate a strong and sustained willingness to working as a collaborative network.
- Each of the strategic partnership projects will be examined from a funding perspective to establish available grant supports to enable the delivery of each project.
- Increasing and promoting environmental enhancement through a sustainable tourism approach.

IMPLEMENTATION

The implementation of the TC DEDP will be overseen by the creation of a working group. The TC DEDP Working Group will operate until 2024. The TC DEDP Working Group will be tasked with supporting the following objectives:

- Support the delivery of the Thoroughbred Country Destination Experience Development Plan.
- Drive growth as per the agreed KPIs in the action plan.
- Lead and manage the action plan ensuring alignment around the prioritisation and delivery of key projects.
- Creation of a representative area wide body which ensures there is a mechanism in place that allows two-way communication between the implementation group and any sub-groups which may be formed.
- Ensure that the catalyst and enabling projects support the delivery of experiences identified in the plan and are delivered within the 5-year timeframe.
- Provide a space where stakeholders can share new ideas with partners.
- Creation of a common tourism voice and a powerful tourism network that promotes each other's interests.

The TC DEDP Working Group formed will represent key stakeholders and representatives from the area. It will be chaired by an independent chairperson with the ability to focus the group in the delivery of the actions required to implement the TC DEDP.

FORMATION OF THE TC DEDP WORKING GROUP (*to be advised)

Implementation of the TC DEDP and delivery of the experiences will require each stakeholder agency or organisation to adapt the way they tell their story and in the selection of projects and initiatives which gain support moving forward.

However, each new or enhanced visitor offering needs to do more than just 'tell a story'. It needs to provide visitors with an opportunity to experience the qualities of the thoroughbred destinations, and to leave feeling fascinated and enriched by brilliant experiences. It is the responsibility of each agency, product provider and business operator to embrace this approach and to put themed experiences at the top of the list of the things shared with our customers.

TC DEDP WORKING GROUP IMPLEMENTATION GROUP

Fáilte Ireland will focus on working with industry that deliver the 'signature experiences' and will help those businesses not currently doing so to start delivering and sharing their unique story. Fáilte Ireland will also support the international distribution efforts of tourism businesses.

TC DEDP Working Group Implementation Group – will focus on guiding key projects and monitoring the TC DEDP progress.

Kildare and Tipperary County Councils – will play a key role in industry and destination development through the implementation of the TC DEDP.

Educators / Enterprise – as educators in tourism, the LEO, LEADER and Education and Training Boards can partner with Fáilte Ireland to assist tourism operators in creating and delivering experiences.

Local tourism groups – need to work together to share their experience stories with Fáilte Ireland and Tourism Ireland, and work with businesses to help them find and share their experience under the common themes established in the plan.

Individual businesses (Private Sector / Industry) – need to find which experience theme they best deliver, develop new or enhance existing experiences, and encourage their customers and the marketing agencies to share that story with the world.

IMPLEMENTATION OF FEASIBILITY PROJECTS

This plan identifies examining the feasibility of a range of projects. Where proposals for new initiatives are progressed to feasibility stage, consultation with relevant interested parties will take place.

ALIGNMENT WITH EXISTING PLANS

This plan has been aligned with all existing agency and stakeholder plans (KCC, TCC). The plan reflects the footfall target growth of HRI in their 2020-2024 strategic plan.

In doing so, it both supports these existing plans and seeks to gain leverage from their strategies and actions.

NOTE: Recommendations listed do not guarantee funding. All projects will have to go through the same application process. It is important to examine what agencies are offering funding as new streams of funding may become available during the lifetime of this plan.

PRODUCTS & EXPERIENCES REFERRED TO BY THIS PLAN

Products and Experiences both existing and potential referred to in this document are examples of such products only and are not intended to be an exclusive list. It is envisaged that others can and will be added during the lifetime of this plan.

5.2 MEASURING SUCCESS

The impact of the TC DEDP will be measured through the monitoring of key metrics that examine the commercial development of tourism across the thoroughbred destination area. The plan framework adopts the VICE model as a means of measuring success. The VICE Framework identifies sustainable tourism as the interaction between Visitors, the Industry that serves them, the Community and culture that hosts them and their collective impact on and response to the environment where it all takes place.

SPECIFIC RECORDED OUTPUTS FORM THE TC DEDP ANNUALLY WILL INCLUDE:

- Increase in visitor numbers to attractions by 5% ahead of the national average from implementation
- Increased saleable product (5 new saleable experiences per Destination Experience Development Plan) and improved distribution
- Increased visitor satisfaction – benchmarked through TripAdvisor
- Opening hour extension – 5% increase annually'

DEMAND SIDE

Measurement 1	Percentage increase in visitor numbers to key attractions
Measurement 2	Percentage increase in revenue in key attractions
Measurement 3	Percentage increase in footfall to free attractions
Measurement 4	Percentage increase in weekend international visitor footfall
Measurement 5	Visitors to local tourist information offices
Measurement 6	Visitor spend in destination
Measurement 7	Occupancy levels achieved
Measurement 7	Occupancy levels achieved

SUPPLY SIDE

Measurement 1	Visitor Satisfaction
Measurement 2	Number of new tourism saleable experiences
Measurement 3	Employment levels in tourism enterprises
Measurement 4	New tourism enterprise development
Measurement 5	Bed stock growth in the destination
Measurement 6	Extension of periods of business operations – extension of business operations into off-season
Measurement 7	Volume of saleable experiences bookable online

DESTINATION SIDE

Measurement 1	Use of Social media # (created in narrative)
Measurement 2	Industry training – Volume of Destination Experience Development Plan related courses and levels of participation on courses
Measurement 3	Annual increase in number of new events / festivals in area

ENVIRONMENT

Measurement 1	Develop effective management of the environment, including natural, cultural, and heritage assets through sustainable tourism.
---------------	--

A TC DEDP Impact Measurement Model has been devised to assess the return on investment from the Destination Experience Development Plan and measure performance across key outputs areas such as accommodation, attractions and industry development.

The four areas of measurement to assess the impact of the TC DEDP are;

1. Measuring our Investment Impact

Monitor the growth in visitor numbers and spend across fee paying attractions and visitor footfall to non-fee paying attractions. This element will focus on assessing the impact of capital investment into major attractions across the destination.

2. Measuring Experience Performance Growth – 'Basket of Thoroughbred Country Experiences – Thoroughbred Tourism Charter'

A 'basket of experiences' will be monitored to assess the experience return on investment derived from TC DEDP programmes to build industry capacity in addition to any future capital investment designed to create or enhance thoroughbred experiences across the destination.

The Plan has identified several experience providers that have committed to further experience development or enhancement of their existing experiences. A basket of experiences will be created through members of the tourism industry who are adopting the TC DEDP as central to their own development focus. This will include members of the tourism industry identified as delivering experiences with high growth potential or strongly aligned with the themes and target sectoral clusters within the TC DEDP i.e. accessible privilege.

Participants within the Thoroughbred Experience Development (TED) Programme who commit to the thoroughbred tourism charter will be included in the 'basket' of experiences. This is based on the collective commitment to work towards achieving the vision set out in the TC DEDP. The 'basket' will be representative of the target sectoral clusters within the plan. A range of performance indicators will be agreed that will include elements such as annual tracking of visitor numbers, season extension, new experiences created, employment indicators.

3. Key Accounts across the Thoroughbred Country geography

The examination of TC DEDP destination growth will be achieved through measuring the performance of key accounts distributed across the thoroughbred geography. The key catalyst projects will be central to this, particularly those who are engaged with the Thoroughbred Trail from a year-round destination perspective and stakeholders who will deliver 'accessible privilege' experiences scheduled throughout the year.

Measuring growth through Fáilte Ireland key accounts will assess industry development across the thoroughbred geography to ensure a representative mix of accommodation, attractions and thoroughbred experiences are measured.

Duplication will be avoided to ensure no double counting with the 'basket' of experiences. Current monitoring of key accounts and associated metrics will feed into the annual tracking of performance for inclusion in an overall TC DEDP Impact Measurement System.

4. Environment

The plan will also develop projects with a central focus on effective management of the environment, including natural, cultural and heritage assets through the progression of a Destination Experience Development Plan Monitoring Programme.

5.3 ENVIRONMENTAL CONSIDERATIONS

1. Introduction

This plan provides an opportunity to ensure that all existing and future tourism projects and initiatives for the Thoroughbred Country Destination Development Plan are planned, developed and managed in a sustainable and integrated manner. The VICE (Visitor, Industry, Community and Environment) Model for Sustainable Tourism is an approach that this plan is developed from and strives to implement.

Fáilte Ireland recognises the need to integrate environmental considerations into this plan in a way that responds to the sensitivities and requirements of the wider natural environment. Environmental consideration including inland and coastal water quality and amenity, climate change, traffic, biodiversity, built and cultural heritage, landscape and communities, all play a vital part in our tourism sector.

The protection, enhancement and promotion of our most important tourism asset – the natural environment, has been an integral part of the formation of this plan as is evidenced in the following:

- Environmental assessments and resulting measuring and monitoring
- A firm commitment to ensuring sustainable and responsible tourism principles are practiced
- Compliance with statutory decision making and consent granting at plan implementation stage
- Integrating requirements for environmental protection and management.

2. Environmental Assessment

Consideration has been given to the requirement to undertake environmental assessment of this plan in order to ensure full legal compliance and to further integrate protection, enhancement and promotion of the environment in developing and implementing the plan. The following sets out the two types of environmental assessments that were considered.

- **Strategic Environmental Assessment (SEA)**

The plan was examined for the need to undertake Strategic Environmental Assessment (SEA). On initial examination of the plan it was determined that full SEA would be required. The assessment process was undertaken having full regard to SEA Directive 2001/42/EU and to Statutory Instrument No. 435/2004 as amended. The detailed outcomes of this process can be referenced in the relevant environmental documents that accompany this plan.

- **Appropriate Assessment (AA)**

The plan was examined for the need to undertake Appropriate Assessment (AA). On initial examination of the plan and in completing screening for AA it was determined that Stage 2 AA would be required. The assessment process was undertaken having full regard to the Habitats Directive 92/43/EEC and to Statutory Instrument No. 477/2011. The output and detailed outcomes of this process can be referenced in the relevant environmental documents that accompany this plan.

3. Key Findings of the SEA & AA Process for the Plan

Having completed full SEA and AA on the Thoroughbred Country Destination Development Plan it is evident that these processes have had a positive influence on the evolution of the plan and will also continue to have a positive environmental influence as the plan enters its implementation phase.

The outcome of completing the above environmental assessments has resulted in the following;

- a) Identifying relevant potential negative environmental impacts resulting from the plan and in some instances excluding actions that might lead to such negative impacts.
- b) Identifying relevant positive environmental impacts resulting from the plan and ensuring the actions that result in environmental protection, enhancement and promotion from key actions at implementation e.g. visitor management actions environmental and sustainable education.
- c) Developing a suite of mitigatory actions to ensure that any negative environmental impacts are reduced or eliminated at plan implementation stage. These include;
 - the requirement to establish the status of the plan and its interrelationship with Statutory Decision making and consent-granting frameworks
 - Integrating the requirements for Environmental Compliance into the plan with particular emphasis on requirements for lower-tier environmental assessment, the County Development Plans that cover the plan area, the Climate Action Plan 2019, visitor management, consideration for infrastructural capacity and green infrastructure and eco system services,
- d) Development and execution of an Environmental Monitoring Programme for the plan during implementation and operation;
 - Monitoring will be based around indicators that allow quantitative measures of trends and progress over time relating to the Strategic Environmental Objectives;
 - A variety of sources of information will be used to run the programme
 - Environmental monitoring for the Destination Development Plan and other existing/future Fáilte Ireland plans, programmes, etc. may be undertaken and reported on at the same time;
 - Appendix 1 sets out the indicators that will be used in the operation of this environmental monitoring programme.



4. Sustainable & Responsible Tourism

This plan conforms and commits to sustainable growth of tourism in the Thoroughbred Country region and in completing the above-mentioned assessments, demonstrates the strong commitment to the VICE Model for Sustainable Tourism Development.

The implementation of the following guiding principles is key to the success of the plan;

GUIDING PRINCIPLES FOR SUSTAINABLE & RESPONSIBLE TOURISM

- Assess the feasibility of developing and implementing visitor management plans where relevant
- Monitor the quality of visitor experiences and local social/cultural impact at key sites
- Encourage the adoption of a responsible tourism approach with ongoing monitoring of environmental impacts
- Ensure the Thoroughbred Country visitor experiences are accessible to all where possible
- Increase awareness and appreciation of the Thoroughbred Country regions unique landscape and environment
- Support voluntary and community-led environmental protection projects, which in turn benefit tourism
- Increase environmental performance among tourism businesses
- Advocate for the protection of key environmental and tourism assets
- Encourage sustainable modes of transport and ensure they are accessible to tourists
- Improve tourist management, particularly in mature and established tourist areas
- Introduce and implement minimum sustainable standards for tour guides
- Encourage tourism related businesses to engage in the Leave No Trace Programme
- Increase and promote environmental protection and enhancement when progressing actions derived from this plan



5. Implementation & Consent

This plan is situated alongside a hierarchy of statutory documents setting out public policy for land use development, tourism, infrastructure, sustainable development, environmental protection and environmental management. These include the National Planning Framework (NPF), Regional Spatial and Economic Strategies (RSEs) and lower tier Development Plans and Local Area Plans.

Implementation of this plan shall be consistent with and conform with the above and will involve Fáilte Ireland helping to facilitate, promote, support and coordinate stakeholders (including local authorities, other government agencies, tourism operators, communities and visitors) in their activities in a way that is consistent with this consent-granting framework.

In order to be realised, projects included in this plan will have to comply, as relevant, with the various provisions of legislation, policies, plans and programmes (including requirements for lower-tier Appropriate Assessment, Environmental Impact Assessment and other licencing requirements as appropriate) that form the statutory decision-making and consent-granting framework, of which this plan is not part and does not contribute towards.

Further detail on requirements in this respect are set out in Section 9.2 of the accompanying SEA Environmental Report.

6. Integrating Requirements for Environmental Protection & Management

Fáilte Ireland provides funding for sustainable tourism projects that emerge as part of specific, competitive, themed and time-bound grant schemes or as part of wider strategic partnerships. These include projects relating to land use, infrastructural development and land use activities and attractions. Reference made to such projects included in this plan does not guarantee funding. While funding is provided to certain projects, Fáilte Ireland is not the developer.

In order to achieve funding for land use or infrastructural development or land use activities, stakeholders shall be required to demonstrate compliance as relevant, with measures and requirements relating to sustainable development, environmental protection and environmental management.

These measures are further detailed in Section 9.3 of the accompanying SEA Environmental Report.

Projects included in the plan will be in compliance with statutory requirements such as the National Monuments Acts 1930 to 2014, the primary legislation for the protection of archaeological heritage.

5.4 ACTION PLAN

The implementation of the TC DEDP is based on stakeholder commitment to project delivery. Key stakeholders will partner on the delivery on the key tasks required to implement the TC DEDP. It represents a five year operational plan creating a destination development focus embracing the thoroughbred opportunity at its core.

The TC DEDP is designed to build on existing project plans and integrate all related activity to ensure a co-ordinated series of outputs to develop the destination. This include projects that are being implemented, projects featured in existing plans and new concepts to build the destination's capacity for new visitor experience development.

The implementation phase is structured around an action plan approach. The framework adopts the VICE model as a means of measuring success and is applied to the operational framework for the TC DEDP. This includes the measurement of projects that will enhance tourism industry capacity development, experience creation and enhancement, catalyst and elevation destination enabling projects.

TIMING

Short-term	Year 1-2	2021/2022
Medium-term	Years 3-4	2023/2024
Long-term	Years 5+	2025

ACRONYM	STAKEHOLDER
FI	Fáilte Ireland
KCC	Kildare County Council
TCC	Tipperary County Council
NS	Irish National Stud
FHCE	Fethard Horse Country Experience
CR	Curragh Racecourse
IK	Into Kildare
HRI	Horse Racing Ireland
PRC	Punchestown Racecourse
NR	Naas Racecourse
IHF	Irish Hotel Federation
PS	Private Sector
DD	Department of Defence
NBS	Newbridge Silverware
GTS	Goffs Thoroughbred Sales
IFS	Irish Farriery School
KV	Kildare Village
RACE	Racing Academy and Centre of Education
TTLG	Thoroughbred Tourism Leadership Group
DVAN	Destination Visitor Attractions Network
ITM	Irish Thoroughbred Marketing
CTLP	County Kildare Leader Partnership
LEO	Local Enterprise Office
KWETB	Kildare Wicklow Education and Training Board
TFI	Transport for Ireland
TT	Tipperary Tourism

STRATEGIC PILLAR ONE – The Thoroughbred		TIME	LEAD	PARTNERS	KPI'S
Project 1 – International Thoroughbred Trail					
1.1	Develop a Foal to Finishing Line experience from the Irish National Stud to Newbridge Trophy experience linked through the creation of collaborative experiences.	ST	FI	PS CR NBS NS	Complete development of new cross saleable tourism experience ready for promotion. Increased visitor numbers at INS and the Curragh.
1.2	Develop the International Thoroughbred Trail (ITT) creating a world class thoroughbred trail experience that interprets the Irish thoroughbred story integrating horse, people and place experiences to establish a global profile for thoroughbred tourism.	ST-LT	FI	KCC TCC TTLG HRI PS IHF IK	Develop, formulate and complete overall strategy for International Thoroughbred Trail.
1.3	The Curragh Plains Experience - Master Planning – Support destination development through the master planning process examining how the thoroughbred narrative and supporting experiences can be developed in the Curragh Plains.	ST-LT	KCC	IK	Feedback TCDEDP objectives into Curragh Masterplan.
1.4	Review the feasibility of creating a Thoroughbred Trainers Trail to map the density of trainers' yards linked to the Stallion Day with the potential to link to the ITT to provide scheduled access to behind the scenes trainers experiences. Integrate horse welfare and retirement into Thoroughbred Story - (Beyond Foal to Finish) and create tourism opportunities	ST-MT	HRI TTLG	FI FHCE	Complete feasibility of study for Trainers Trail. Audit and engage with horse welfare and horse retirement companies.
1.5	Develop an annual calendar of unique thoroughbred tourism experiences agreed between all stakeholders that creates a destination depth of accessible privilege experiences linked to the ITT i.e. scheduled per quarter and linked to year-round available experiences e.g. meet the trainers day scheduled a number of times per year.	ST-LT	HRI TTLG FI	PS IK	Complete calendar of thoroughbred events and festivals.
1.6	Develop a number of key ITT hubs as orientation points around the destination. These will be a blend of key towns and visitor attractions that link core thoroughbred and non-thoroughbred experiences.	MT	KCC TCC	FI IK FHCE	Identify funding opportunities for capital investment linked to the International Thoroughbred Trail development.
1.7	Examine the development of audio visual / virtual reality and placemaking thoroughbred history interpretation opportunities, communicating the destination story at key points of interest to build the scale of the thoroughbred destination.	MT	KCC IK	FI FHCE	Complete audit of potential locations.
1.8	Assess the opportunity to create an international Thoroughbred Legends Walk of Fame concept creating a 'thoroughbred boulevard' linking Kildare town points of interest to the Curragh marked with the names of Derby winners and legends. The development of the concept should consider the destination profiling opportunities such as public voting for the Walk of Fame inductees and incorporating Derby festival event activity around the concept.	MT-LT	KCC HRI CR	IK	Establish working group and complete assessment of trail. Seek capital funding opportunities to complete.
1.9	Examine the creation of a walking trail / greenway linking Kildare town with the Curragh Plains differentiated through an equine theme to create an experiential thoroughbred greenway trail.	LT	KCC	IK	Seek funding for feasibility of Trailway/Greenway. Increased numbers of walkers and cyclist connecting between Kildare and Curragh/Newbridge.

STRATEGIC PILLAR ONE – The Thoroughbred		TIME	LEAD	PARTNERS	KPI'S
Project 2 – The Irish National Stud					
2.1	Develop a 360 degree Irish National Stud Experience programme to maximise its ability to attract increased numbers of visitors and provide an extended range of experiences from general access to accessible privilege.	ST	FI	NS	Complete commercial plan for new Racehorse Experience at the INS. Increased visitor numbers and revenues YoY as per capital grant KPI's.
2.2	Develop a destination orientation model that maximises the Irish National Stud's potential to be a key destination hub to promote new thoroughbred experience packages that result in increased destination dwell time.	ST	NS	FI	Increased referrals between INS and other attractions. Dwell time in destination - measured through increased hotel overnights.
2.3	Examine the capacity of the Irish National Stud site to host niche events around major destination festivals in addition to expanding evening economy options and appealing to the MICE sector.	ST-MT	NS	FI	Complete development of new saleable tourism experience ready for promotion.
Project 3 – The Curragh Experience					
3.1	Undertake an experience development innovation programme to provide bookable visitor experiences, event week experiences and premium experiences. The saleable experiences will incorporate a range of behind the scenes opportunities building on the heritage of the place e.g. Queens Room through to developing VIP experiences interacting with trainers and jockeys.	ST	CR	FI	Complete development of new saleable tourism experience ready for promotion.
3.2	Examine the feasibility of creating Curragh Sunrise Gallop Experiences at the Curragh with leading trainers and industry professionals on a scheduled basis.	ST	CR	PS	Complete feasibility study and initiate development of new experiences. Identify potential partners - trainers and professionals.

STRATEGIC PILLAR ONE – The Thoroughbred		TIME	LEAD	PARTNERS	KPI'S
Project 4 – Fethard Horse Country Experience					
4.1	Develop the Fethard Horse Country Experience to enhance the visitor experience journey from pre-visit to post visit and incorporating the Coolmore visit experience.	ST	FHCE	FI	Complete development of new saleable tourism experience ready for promotion.
4.2	Examine the development of new higher value experiences at Fethard Horse Country Experience linking the local economy and the visitor attraction e.g. local food and thoroughbred experiences.	ST	FHCE	FI	Complete development of new ultraluxe saleable tourism experience ready for promotion.
4.3	Implement an experience enhancement programme for the Coolmore visit experience through a focus on accessible privilege and the development of a premium experience that matches its world class thoroughbred status.	ST	FHCE	FI	Identify funding opportunities for capital investment linked to the ITT development.
4.4	Examine the opportunity to create linkages between Fethard Horse Country Experience, Coolmore and the Rock of Cashel through the International Thoroughbred Trail to cross promote and extend dwell time in the area.	ST	FI TCC	FHCE	Identify opportunities within the Cashel Destination Town Capital Project for Thoroughbred Orientation. Complete the Cashel Destination Town Project.
4.5	Develop a new Fethard town experience to develop the town capacity to become an ITT hub integrating food, activities and thoroughbred stories that will retain more visitors for the daytime economy.	MT	TFI TCC	FHCE	Devise a co-ordinated tourism strategy for Fethard. Assess local industry capacity requirements and provide supports through Cluster Development Programme.
4.6	Review the development of accessible privilege and premium experiences incorporating Coolmore in the context of a "Giving back through tourism" model. This will result in a re-investment of tourism dividends into community tourism development and linked to comparable CSR proposals at R.A.C.E.	MT	FHCE	PS FI	Complete benchmarking of community tourism model and implement best practise.
4.7	Explore the thoroughbred story opportunity in South Tipperary through the 'Minella' theme incorporated into the County Museum to reflect the international significance of the story. Enhance the associated visitor experience through the Clonmel public realm and Flights of Discovery projects contributing to an extended visitor experience.	MT	TCC	TT	Creation of cluster group around Minella Theme. Develop industry collaboration between local and regional experiences. Integrate with activity, food, craft and culture cluster opportunities.
Project 5 - Goffs Visitor Experience					
5.1	Develop new saleable visitor experiences at Goffs that cater for a range of visitor segments.	ST	GTS	TTLG FI	Complete development of new saleable tourism experience ready for promotion.
5.2	Develop a VVIP experience package for promotion to the high value Goffs network integrating destination thoroughbred experiences providing access to unique insights for equine professionals delivered through the accessible privilege opportunity. The VVIP programming should be supplemented with the development of a prestige partner programme among all tourism providers, ancillary services and the thoroughbred industry.	ST	GTS	TTLG FI	Complete development of new ultraluxe saleable tourism experience ready for promotion.

STRATEGIC PILLAR TWO – Thoroughbred People		TIME	LEAD	PARTNERS	KPI'S
Project 6 – The Horse Crafts					
6.1	Undertake an audit of the existing horse crafts industry capacity to develop a series of immersive visitor experiences around the theme of the horse crafts that provide visitors with access to traditional horse people such as farriers and saddle makers.	ST	TTLG	IK TT	Complete desk audit existing horse crafts. Engage and network through Cluster Development Programme. Identify best prospects for saleable experience development.
6.2	Develop a "Shoe of Champions" experience with the Irish Farriery School to deliver a schedule of a farriery experiences throughout the year aligned with major event activity focused on the horse shoe story and visitor opportunities to create their own Derby champions shoe.	ST	IFS	TTLG FI IK	Engage with Thoroughbred Trail Cluster Development Programme. Initiate development of new saleable tourism experience ready for promotion.
Project 7 – Thoroughbred Education Experience					
7.1	Assess the feasibility of developing short stay premium international thoroughbred educational programmes integrating all elements of the thoroughbred destination. This will build on the current education provision to develop packages that will appeal to the international market.	MT	PS TTLG	FI	Identify key industry partners and establish working group to determine feasibility of programme.
Project 8 – R.A.C.E Visitor Experience					
8.1	Develop a R.A.C.E. visitor experience to create a saleable experience scheduled for a number of times annually, integrating the place and its people to deliver a highly differentiated experience. The experiences will be linked to major festivals, race days and non-race days	ST	RACE	TTLG FI	Engage with Thoroughbred Trail Cluster Development Programme. Initiate development of new saleable tourism experience ready for promotion.
8.2	Develop a "Giving back through tourism" programme linked with the R.A.C.E. Visitor experiences creating a mechanism to fund bursaries for jockeys through scheduled privilege access and premium experiences.	MT	RACE	TTLG	Complete development of saleable tourism experience with a key selling feature around reinvestment of commercial returns for jockey training scholarships.
Project 9 – Meet the Experts / Meet the Destination					
9.1	Examine the feasibility of developing a schedule of "Meet the Experts" discussions with industry figures showcasing the destinations cultural venues and attractions linked to major racing festivals and events e.g. Queens Room at the Curragh, Kildare Courthouse, Newbridge Silverware.	MT	TTLG CR NBS NB	FI	Complete an annual calendar of Meet The Experts events. Measure visitor numbers to events.
Project 10 - Thoroughbred Tourism Charter					
10.1	Launch the Thoroughbred Tourism Leadership Group aligned to a Thoroughbred Country stakeholder charter signed by stakeholders committed to delivery of the five-year TC DEDP plan.	ST	TTLG	KCC TCC FI IK TT	Establish Thoroughbred Country Steering Group and Terms of Reference. Complete Thoroughbred Charter document.

STRATEGIC PILLAR THREE – Thoroughbred Place and Heritage		TIME	LEAD	PARTNERS	KPI'S
Project 11 - Attractions Competitiveness					
11.1	Develop an experience development programme to integrate the thoroughbred story into existing attractions to foster increased collaboration between experiences and maximise the opportunity for major attractions to become central to the ITT and thoroughbred experience orientation points.	ST-LT	FI	DVAN IK TT	Create and deliver Experience Development Programme. Identify high potential experiences. Implement programme based on key clusters and growth targets. Monitor performance of programme participants.
11.2	Examine the feasibility of Kildare Heritage Centre becoming a key orientation hub for the ITT supported by an enhanced visitor experience. This will include a review of experience development and operational requirements for Kildare Heritage Centre to become a key orientation hub.	MT	KCC IK	FI	Identify potential funding streams for Kildare Town Centre to become key orientation point.
11.3	Examine the operational requirements required to improve visitor access and the visitor experience at the Curragh Military Museum linked to the thoroughbred and destination equine story.	LT	DD	CR KCC IK FI	Initiate discussions and Business Plan to unlock the tourism opportunity for the Curragh Military Museum.
Project 12 – Newbridge Silverware					
12.1	Develop a prestige Newbridge experience linked to the thoroughbred theme and association with the commissioning of the Irish Derby winners trophy.	ST	NBS	FI IK	Complete development of new saleable tourism experience ready for promotion.
12.2	Examine the creation of new thoroughbred experience elements into Newbridge Silverware visitor centre linking the heritage of the brand with the equine industry.	ST- MT	NBS	FI	Complete development of new saleable tourism experience ready for promotion.
12.3	Review the opportunity to host specialist thoroughbred events e.g. fashion and the races, pundit events at Newbridge Silverware linked to the development of the destination activity around major event festivals.	ST- MT	NBS	IK	Develop and deliver a Festivals and Events Strategy.

STRATEGIC PILLAR THREE –		TIME	LEAD	PARTNERS	KPI'S
Thoroughbred Place and Heritage					
Project 13 – Industry Development – Tourism & Thoroughbred					
13.1	Create a programme to create Destination Champions under a dedicated Thoroughbred Experience Development (TED) programme that will concentrate on members of the tourism trade with the capacity to deliver visitor growth and integrate the thoroughbred story into their experiences i.e. through activities and attractions.	ST	FI	IK TT	Initiate Thoroughbred Trail Cluster Development Programme to embed Thoroughbred Story.
13.2	Undertake an annual thoroughbred tourism/industry ambassadors programme to educate the industry on the heritage of the place and the quality of experiences available across the destination.	ST	TTLG	IK LEO KWETB CKLP	Develop and deliver Thoroughbred Ambassadors Programme.
13.3	Support Thoroughbred Country attractions and activities through the Digital Transformation Programme. Agree clear outputs with actions and a roadmap to connect with sales platforms, increased number of digital linkages and joint ticketing / packaging	ST	TTLG FI	PS	15 Thoroughbred Experiences signed up to the Digital That Delivers Programme Year 1.
13.4	Undertake industry capacity training to create new experiences to increase the volume of bookable thoroughbred and cross-cutting thematic experiences. This will develop a range of thematic bundles to foster collaborative experiences across the destination to be programmed and distributed through hotels.	ST-LT	FI	IK LEO KWETB CKLP	Create and deliver through Cluster Experience Development Programme.
13.5	Examine the development of reciprocal networking marketing opportunities through the thoroughbred industry's global network to cross collaborate on marketing and knowledge sharing around thoroughbred tourism.	ST-LT	TTLG ITM HRI	IK	Develop Stakeholder & Industry Communication Plan.
13.6	Examine the alliance marketing opportunity among the tourism and thoroughbred industry to target international racing in clubs with event plus experience packages to create the Ireland Thoroughbred Visitor Experience.	ST-LT	TTLG ITM HRI	IK TT	Develop Stakeholder & Industry Communication Plan.
13.7	Develop new MICE premium experiences working with accommodation providers focused on the authenticity of the thoroughbred story and range of accessible premium experiences.	MT	PS IHF	FI IK	Create MICE Cluster and cluster commercial plan to target new MICE business into the destination. Grow MICE sector ahead of regional average.
13.8	Review the feasibility of developing the "Thoroughbred Concierge" to create a dedicated resource to focus on thoroughbred experience development and management.	MT	TTLG	PS	Agree development activities. Review Thoroughbred Executive role reporting direct to the TTLG.

STRATEGIC PILLAR THREE – Thoroughbred Place and Heritage		TIME	LEAD	PARTNERS	KPI'S
Project 14 – Evening Economy					
14.1	Develop a series of new evening economy experiences designed to retain visitors in the area for longer while also of linking activity to new early morning activities e.g. early morning gallops experiences.	ST-LT	FI	TTLG KCC TCC	Complete audit of evening economy provision in 2 destination towns. Work with local authority and tourism industry to develop evening economy plan. Develop 6 new evening economy experiences.
14.2	Expand current evening economy visitor options through the development of scheduled events using key venues and attractions across the destination e.g. Irish National Stud, Curragh, Newbridge Silverware.	ST-LT	FI	TTLG NS CR NBS FHCE	Work with local authority and tourism industry to develop evening economy plan. Develop 6 new evening economy experiences.
Project 15 – Cross-cutting Theme Development					
15.1	Create an annual experience focus on retail and fashion experiences linked to the thoroughbred event themes partnering with outlets such as Kildare Village focusing on fashion, colours and silks.	ST-LT	PS	IK FI	Develop through Cluster Development Programme. Create a benchmarking system to measure impact.
15.2	Examine the development of destination taste trails that build on the heritage of the Curragh coffee house (venue for the first meeting of the Irish Turf Club in 1750) as a starting point for the food and drink innovation and using the thoroughbred destination theme as a differentiator.	MT	KCC	TTLG IK	Complete food and drink experience audit that can link providers to the Thoroughbred Story.
15.3	Support the development of new food and drink experiences with the capacity to collaborate with thoroughbred experiences and integrated into the ITT. This should also examine the inclusion of the thoroughbred theme with existing food activity such as Taste of Kildare	MT	FI	IK KCC LEO KWETB CKLP TT	Develop programme of food industry specifics aligned to experience development. Create 6 saleable food & drink experiences linked to the Thoroughbred Story. Create a business support programme for the food industry through Cluster Development Programme.
Project 16 – Destination Placemaking and Public Realm					
16.1	Examine innovative approaches to new destination public realm projects linked to the thoroughbred theme that will integrate key visitor hubs such as Kildare Village with the town centre and aid visitor dispersion and orientation into the town.	ST-LT	KCC	IK	Identify funding opportunities for capital investment linked to the International Thoroughbred Trail development.
16.2	Examine the application of the thoroughbred destination brand theme to the development of public realm and placemaking projects conveying the destination profile as a thoroughbred destination.	ST-LT	KCC TCC	IK TT	Identify and agree potential locations linked to International Thoroughbred Trail.

STRATEGIC PILLAR THREE – Thoroughbred Place and Heritage		TIME	LEAD	PARTNERS	KPI'S
Project 17 – Thoroughbred Tourism Brand					
17.1	Create a new website linked to the Thoroughbred Country experience development acting as a marketing and sales platforms for all partners.	ST	TTLG	PS	Complete new Thoroughbred Country website.
17.2	Create a business plan to support the annual operations of a Thoroughbred Tourism model guiding an executive role in terms of business focus, pricing and operational model	ST	TTLG	FI	Recruit Thoroughbred Executive to support development of plan Complete business plan.
17.3	Develop a new destination brand and communications programme to be adopted by the tourism and thoroughbred industry and also for application to future promotional, public realm and way finding projects.	ST-MT	TTLG TCC KCC	IK TT	New Thoroughbred Branding developed. Destination branding incorporated into website. Brand strategy incorporated into Thoroughbred Trail concept strategy.
Project 18 – Thoroughbred Culture					
18.1	Undertake a review of potential uses for Kildare Courthouse to be developed as an international cultural centre with a strong equine culture theme to establish a niche market position in arts and equine culture eg. equine art, photography, performing arts.	ST-MT	KCC	IK	Complete review on potential uses for Kildare Courthouse.
18.2	Commission a living history project capturing the thoroughbred history story of the destination in conjunction with recognised local experts.	ST-MT	TTLG	CKLP	Complete review of enhancement options for Living History visitor experiences. Assess operational considerations and feasibility of delivery Living History / Thoroughbred Live programming.
18.3	Examine the potential of housing the temporary Derby Week Festival Museum and artefacts as a year-round visitor attraction in a Kildare location.	MT	KCC	IK	Identify location and complete event plan

STRATEGIC PILLAR THREE – Thoroughbred Place and Heritage		TIME	LEAD	PARTNERS	KPI'S
Project 19 – Accommodation Capacity					
19.1	Examine existing tourism opportunity sites in Kildare to be considered for future development as hotels to increase existing destination accommodation capacity.	LT	KCC IK	FI	Initiate a sustainable accommodation growth plan through research and audit existing bed-stock throughout Kildare. Identify 'gaps' between existing and future accommodation requirements and potential development opportunities. Identify tourism related projects in the pipeline that could have an impact on future requirements for accommodation. Identify incentives or supports that could encourage accommodation providers to invest in Kildare.
Project 20 – Kildare Town					
20.1	Develop Kildare Town as a key destination hub facilitating the growth of the ITT, visitor services and supporting experiences while becoming a key orientation focal point for the thoroughbred destination.	ST-LT	KCC IK	FI	Develop a Destination Town Plan. Complete FI Destination Town Capital Investment Project.
Project 21 – Destination Access					
21.1	Review the opportunities to provide increased levels of public transport access across the destination examining existing resources such as the Local Link and interacting with current public transport services and facilities.	MT	FI	TFI	Audit of public transport options for accessing destination hubs and experiences. Identify gaps in connectivity and including linkages to trails e.g. Greenways, Blueway's, Curragh Plains etc.

STRATEGIC PILLAR THREE – Thoroughbred Place and Heritage		TIME	LEAD	PARTNERS	KPI'S
Project 22 – Kildare Village					
22.1	Develop a destination framework to engage with Kildare Village to explore new destination profiling opportunities linking the village with new thoroughbred experiences delivering accessible privilege.	ST	TTLG	FI	Engage Kildare Village with Thoroughbred Country DEDP. Complete development of new saleable tourism experience ready for promotion.
22.2	Create a series of premium 'partner' programmes with Kildare Village and other visitor attractions to cater for the partners of thoroughbred buyers visiting the destination.	ST-LT	KV	ITM DVAN TTLG	Create and deliver a Thoroughbred Partner Programme for buyers. Identify high potential experiences. Monitor performance of programme participants.
22.3	Examine the pre-opening hour opportunity at Kildare Village that can create a local thoroughbred morning experience for groups waiting for the Village to commence trading (eg. 9 am to 10 am.)	ST-LT	KV	DVAN CR	Complete development of new saleable tourism experience ready for promotion.
22.4	Undertake industry training to target and cater for the Asian visitor market generated through Kildare Village with the potential to open up greater levels of visits to other attractions.	MT	FI	KV DVAN IK	Identify industry for China Readiness Programme.

STRATEGIC PILLAR FOUR – The Winning Post		TIME	LEAD	PARTNERS	KPI'S
Project 23 – Destination Festivals					
23.1	Create the destination structures and supports required to develop two major festivals around the Irish Derby and Punchestown Festival.	ST	KCC FI	CR PRC IK PS IHF	Complete Festivals and Events Strategy. Establish collaborative working group to develop the Festival Strategy.
23.2	Develop a five year event strategy focused on creating two major destination events.	ST	KCC TCC FI	IK TT	Complete Events Strategy.
23.3	Examine the capacity of existing events to incorporate the thoroughbred theme for consistency in the destination narrative e.g. Taste of Kildare	ST	IK		Create and deliver Festivals Workshop for Thoroughbred Country.
Project 24 – Stallion Days					
24.1	Leverage off the uniqueness of events such as Stallions Day to develop a wider destination opportunity linked to the ITT and integrating attractions and other experiences into the destination experience.	ST	HRI PS	FI FHCE	Complete feasibility of study for Trainers Trail. Audit and engage with horse welfare and horse retirement companies.
Project 25 – Niche Event Development					
25.1	Develop a Champions Weekend Champions Experience as a destination niche event to attract and retain visitors through the destination eco-system from early morning gallops, exclusive tours, attractions and hospitality experiences.	MT	CR	PS IHF	Complete development of new saleable tourism experience ready for promotion.
Project 26 – Destination Race Days					
26.1	Develop a calendar of premium race day experiences that combine the thoroughbred destination story, behind the scenes with race day event attendance, adapting a seasonal approach to accessing flat and national hunt events.	ST-LT	HRI TTLG PS	CR PRC NR IHF	Compile calendar of premium race day experiences. Develop calendar as a destination sales tool and network with accommodation partner for use at domestic and international sales events.

APPENDIX



ENVIRONMENTAL COMPONENT	INDICATORS	TARGETS	SOURCE AND (WHERE AVAILABLE) FREQUENCY
BIODIVERSITY, FLORA AND FAUNA	B1: Conservation status of habitats and species as assessed under Article 17 of the Habitats Directive	B1: Maintenance of favourable conservation status for all habitats and species protected under national and international legislation to be unaffected by implementation of the plan	- Documentation demonstrating compliance with "Requirements for Environmental Protection and Management" - Lower tier environmental assessment and decision making by local authorities
	B2: Percentage loss of functional connectivity without remediation resulting from plan	B2: No significant ecological networks or parts thereof which provide functional connectivity to be lost without remediation resulting from the plan ¹	SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies)
	B3i: Number of significant impacts on relevant habitats, species, environmental features or other sustaining resources in designated sites including Wildlife Sites resulting from the plan	B3i: Avoid significant impacts on relevant habitats, species, environmental features or other sustaining resources in designated sites including Wildlife Sites resulting from the plan	Department of Culture, Heritage and the Gaeltacht report of the implementation of the measures contained in the Habitats Directive - as required by Article 17 of the Directive (every 6 years)
	B3ii: Number of significant impacts on the protection of listed species	B3ii: No significant impacts on the protection of listed species resulting from the plan	- Department of Culture, Heritage and the Gaeltacht's National Monitoring Report for the Birds Directive under Article 12 (every 3 years) - Consultations with the NPWS - CORINE mapping resurvey (every c. 5 years) - Input from any other existing or replacement Fáilte Ireland monitoring programmes
POPULATION AND HUMAN HEALTH	PHH1: Occurrence (any) of a spatially concentrated deterioration in human health arising from environmental factors resulting from the plan, as identified by the Health Service Executive and Environmental Protection Agency	PHH1: No spatial concentrations of health problems arising from environmental factors as a result the plan	- Documentation demonstrating compliance with "Requirements for Environmental Protection and Management" - Lower tier environmental assessment and decision making by local authorities - SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) - Consultations with the HSE and EPA - Input from any other existing or replacement Fáilte Ireland monitoring programmes

¹ Except as provided for in Article 6(4) of the Habitats Directive, viz. There must be: (a) No alternative solution available; (b) Imperative reasons of overriding public interest for the programme to proceed; and (c) Adequate compensatory measures in place.

ENVIRONMENTAL COMPONENT	INDICATORS	TARGETS	SOURCE AND (WHERE AVAILABLE) FREQUENCY
SOIL	S1: Artificial surfaces land cover extent	S1: Contribute towards the target of the National Planning Framework's SEA (2018) to "Maintain built surface cover nationally to below the EU average of 4%."	- Documentation demonstrating compliance with "Requirements for Environmental Protection and Management" - Lower tier environmental assessment and decision making by local authorities - SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) - CORINE mapping resurvey (every c. 5 years) - Input from any other existing or replacement Fáilte Ireland monitoring programmes
WATER	W1i: Classification of Overall Status (comprised of ecological and chemical status) under the European Communities Environmental Objectives (Surface Waters) Regulations 2009 (SI No. 272 of 2009) W1ii: Mandatory and Guide values as set by the EU Bathing Water Directive and transposing Bathing Water Quality Regulations (SI No. 79 of 2008) W2: Interactions with Groundwater Quality Standards and Threshold Values under Directive 2006/118/EC resulting from development adhering to the plan W3: Compliance of relevant lower tier assessments and decision making with the Flood Risk Management Guidelines	W1i: No deterioration in the status of any surface water or adverse effect upon the ability of any surface water to achieve 'good status' as a result of the plan W1ii: No deterioration in the value of bathing waters or adverse effect upon the ability of any bathing water to achieve mandatory values and, where possible, guide values as a result of the plan. W2: Not to affect the ability of groundwaters to comply with Groundwater Quality Standards and Threshold Values under Directive 2006/118/EC, subject to exemptions provided for by Article 4 of the WFD W3: For lower tier assessments and decision making to comply with the Flood Risk Management Guidelines	- Documentation demonstrating compliance with "Requirements for Environmental Protection and Management" - Lower tier environmental assessment and decision making by local authorities - Data issued under the Water Framework Directive Monitoring Programme for Ireland (multi-annual) - EPA The Quality of Bathing Water in Ireland reports - SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) - Input from any other existing or replacement Fáilte Ireland monitoring programmes

ENVIRONMENTAL COMPONENT	INDICATORS	TARGETS	SOURCE AND (WHERE AVAILABLE) FREQUENCY
AIR AND CLIMATIC FACTORS	AC1: Demonstration of compliance with provisions relating to climate adaptation and mitigation have been integrated into the plan.	C1: To maximise the amount of measures relating to climate adaptation and mitigation being implemented	• Documentation demonstrating compliance with "Requirements for Environmental Protection and Management" • Lower tier environmental assessment and decision making by local authorities • SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) • Input from any other existing or replacement Fáilte Ireland monitoring programmes
	M1: Number of instances whereby the potential impact on existing infrastructure (with respect to infrastructural capacity, including drinking water, wastewater, waste and transport) as well as the potential environmental effects of a likely increase in tourism-related traffic volumes along any routes resulting from the relevant initiative are not considered and mitigated as appropriate, where relevant.	M1: No instances whereby the potential impact on existing infrastructure (with respect to infrastructural capacity, including drinking water, wastewater, waste and transport) as well as the potential environmental effects of a likely increase in tourism-related traffic volumes along any routes resulting from the relevant initiative are not considered and mitigated as appropriate, where relevant.	• Documentation demonstrating compliance with "Requirements for Environmental Protection and Management" • Lower tier environmental assessment and decision making by local authorities • SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies)
MATERIAL ASSETS	M2: Number of significant adverse effects on the use of or access to public assets and infrastructure	M2: No significant adverse effects on the use of or access to public assets and infrastructure	• Consultations with partners such as the EPA, Irish Water, Kildare County Council and Tipperary County Council
	M3: Preparation and implementation of construction and environmental management plans	M3: For construction and environmental management plans to be prepared and implemented for relevant projects	• Input from any other existing or replacement Fáilte Ireland monitoring programmes

ENVIRONMENTAL COMPONENT	INDICATORS	TARGETS	SOURCE AND (WHERE AVAILABLE) FREQUENCY
CULTURAL HERITAGE	CH1: Percentage of entries to the Record of Monuments and Places protected from significant adverse effects arising from the plan	CH1: No unauthorised adverse effects on archaeological heritage resulting from implementation of the plan	• Documentation demonstrating compliance with "Requirements for Environmental Protection and Management" • Lower tier environmental assessment and decision making by local authorities • SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) • Input from any other existing or replacement Fáilte Ireland monitoring programmes
	CH2: Percentage of entries to the Records of Protected Structures and Architectural Conservation Areas and their context protected from significant adverse effects arising from the Plan	CH2: No unauthorised adverse effects on architectural heritage resulting from implementation of the plan	• Lower tier environmental assessment and decision making by local authorities • SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) • Input from any other existing or replacement Fáilte Ireland monitoring programmes
LANDSCAPE	L1: Number of unmitigated conflicts with the appropriate protection of statutory designations relating to the landscape, including those included in the land use plans of Kildare County Council and Tipperary County Council.	L1: No unmitigated conflicts with the appropriate protection of statutory designations relating to the landscape, including those included in the land use plans of Kildare County Council and Tipperary County Council.	• Documentation demonstrating compliance with "Requirements for Environmental Protection and Management" • Lower tier environmental assessment and decision making by local authorities • SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) • Input from any other existing or replacement Fáilte Ireland monitoring programmes



**IRELAND'S
ANCIENT EAST®**
Wander Through Time



**THOROUGHBRED
COUNTRY**



**Fáilte
Ireland**