

# TOURISM IMPACT ASSESSMENT

Carrick-on-Suir Regeneration Plan

April 2022

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Our analysis has been undertaken based on information supplied to us by TCC and agents of TCC including project concept and data / information prepared by third parties. Where we have relied on information provided by third parties, we take no responsibility for the accuracy of that information.

The purpose of this report is to provide independent analysis of a range of potential tourism impacts and scenarios that are contingent on future private and / or public private investment and the provision of the appropriate level of infrastructure to facilitate the site activities assumed with the scenarios created.

Repucon Consulting reserves the right to make adjustments to the estimate of the values reported herein, if additional or more reliable information becomes available after the report date.

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# EXECUTIVE SUMMARY



## EXECUTIVE SUMMARY

Tipperary County Council commissioned Repucon Consulting to undertake an independent tourism impact assessment of the proposed Carrick on Suir Regeneration Plan. The objective of the independent assessment is to establish the likely tourism and amenity impact of the proposed Regeneration Plan. The proposed investment would become a strategic enabler of the town and its assets including in particular, Suir Blueway Tipperary and the Ormond Castle Quarter helping to realise their tourism and socio-economic potential for the area.

The anticipated transformational potential of the Regeneration Plan investment is summarised as follows;

1. Position Carrick on Suir as an iconic Blueway Trail Head differentiated by the quality of its public realm, visitor infrastructure and its linkages with the heritage, amenities and cultural tourism products of its town centre.
2. Invest in the opportunity to link the Suir Blueway Tipperary at Carrick on Suir with the Waterford Greenway and greater South East greenway network, and enable the creation of a new international standard trails experience, blending land and water experiences.
3. Grow the capacity of the town as a key visitor experience in Ireland's Ancient East and maximise the regional opportunity through development of the Ormond Castle Quarter. Maximise regional linkages between Carrick on Suir and towns on the Butler Trail by enhancing the town as a place to visit and spend extended time.
4. Enable Carrick on Suir to accelerate strategic synergies with the extended clusters of tourism towns in Tipperary (e.g. Cashel, Cahir, Clonmel, Fethard and the region (Kilkenny and Waterford) and maximise the regional impact of developing Carrick on Suir as part of the Limerick-Waterford network, contributing to a range of socio-economic impacts/synergies that include visitor dispersion, increased dwell time, sustainable transport and extending the season.
5. Provide an economic stimulus for the local economy and achieve a growth in visitor footfall across the town through public realm enhancement enabling the development of a year-round tourism product and enhanced quality of life for local persons.
6. Develop the profile of Carrick on Suir as a destination for responsible tourism through sustainable transport means (rail, walking and cycling) and as an exemplar for low carbon impact tourism. Enable cyclists, runners, walkers and water users to enjoy low carbon impact tourism whilst exploring parts of the outdoor experience in Tipperary, and support other outdoor activity resources including the Munster Vales.
7. Provide an economic stimulus for a tourism economy currently experiencing low levels of economic performance. Enhance the supply side conditions of the local tourism economy

through enhanced visitor flow and public realm, stimulation of tourism entrepreneurship within the town and innovative usage of facilities such as the marina, heritage centre etc

8. Create the local conditions to provide the private sector with the confidence to invest in new year-round tourism enterprises and deliver an economic and social return on investment with a short payback period for public investment.

The post Covid-19 tourism environment has presented destinations such as Carrick on Suir with considerable opportunities to capitalise on. The town possesses the infrastructure and operating environment to become an exemplar for sustainable tourism based on ease of access by public transport, local active travel facilities and approach to community development.

The investment in the Suir Blueway Tipperary has resulted in the creation of a destination wide asset designed to benefit the growing demand for outdoor recreation activities. Significantly for Carrick on Suir is the opportunity to link the Blueway with the Ormond Castle Quarter and create new ways to access and interpret the local heritage story. The investment in the Blueway and the recent product development investment at Ormond Castle has created the local conditions to develop a range of new visitor experiences told in a differentiated way through heritage, culture and activities.

The Regeneration Plan development includes public realm refurbishment and enhancement at Sean Healy Park comprising the dedicated space for watersports, footpaths and hard paved areas, widening of the Blueway and the development of associated landscaping and services/utilities to serve the proposed and future uses. It also includes the extension of the Suir Blueway Tipperary along North Quays to provide cycleway and pedestrian linkages from Sean Healy Park to Ormond Castle and the town centre, as well as the upgrading of Strand Walk with new paving and the development of a new access to Ormond Castle grounds.

Total numbers using the Suir Blueway Tipperary and visitors to town is projected to be 560,629 over the initial five year period. An estimated 77,000 bednights will be generated by domestic and international visitors directly attributable to the investment in the town's regeneration plan. Based on the direct and indirect impacts of all visitor expenditure (overnight and daytime visitors) there is a projected total exchequer return of €7.46 million (NPV) in the first five years, of which €3.55 million (NPV) relates to direct expenditure. The total GVA impact of economic activity over years one to five is €16.49 million (NPV).

Over an assessment period of 25 years, the total exchequer returns impact from this new level of tourism activity amounts to €45.38 million (NPV) with €21.61 million (NPV) attributable to direct expenditure by visitors to the area. The total GVA impact of economic activity over the same period is €113.80 million (NPV).

The value of overseas tourists to the wider area will increase to more than €1.58 million (NPV) over the initial five years. A total of 170,000 day visitors are projected for the local area over the initial five years after completion of the project, generating a total of €4.26 million (NPV) in expenditure in the local economy. Over the initial 25 years after completion, there will be a projected 1.48 million day visitors to the local area generating more than €27.11 million (NPV) in expenditure.

This level of expenditure in the regeneration project and its impact on tourism is projected to support 19 direct jobs in year one, rising to 34 Full Time Equivalent (FTEs) by year five. When the multiplier

impacts are accounted for this has a total employment impact of 40 in year one, rising to 71 in year five. By year ten expenditure is projected to support 48 direct FTEs with a total employment impact of 99. It is projected that in year 25 visitor expenditure will support 91 FTEs with a total employment impact of 189.

The analysis presents the scale of opportunity that exists and the possible tourism impact that can accrue to Carrick on Suir. The social impact of €2.07 million (NPV) illustrates the community value the amenity will generate over the initial five years in addition to the anticipated health benefits. Over the extended period of analysis the value of tourism will increase significantly, attracting more international visitors as a result of the investment and the establishment of key local attractions and activities such as the Ormond Castle investment and the Blueway. The 'do nothing versus the 'investment' scenarios analysis clearly demonstrate the scale of difference in the socio-economic impact for Carrick on Suir. In the immediate term, the regeneration investment will have a very significant impact on Carrick on Suir. Over a longer timeframe, the investment will become a catalyst for sustained economic impact across the wider tourism economy of the cluster of Cahir, Clonmel, Cashel, Fethard and Carrick on Suir and surrounding destinations in County Waterford and Kilkenny.

# SECTION ONE

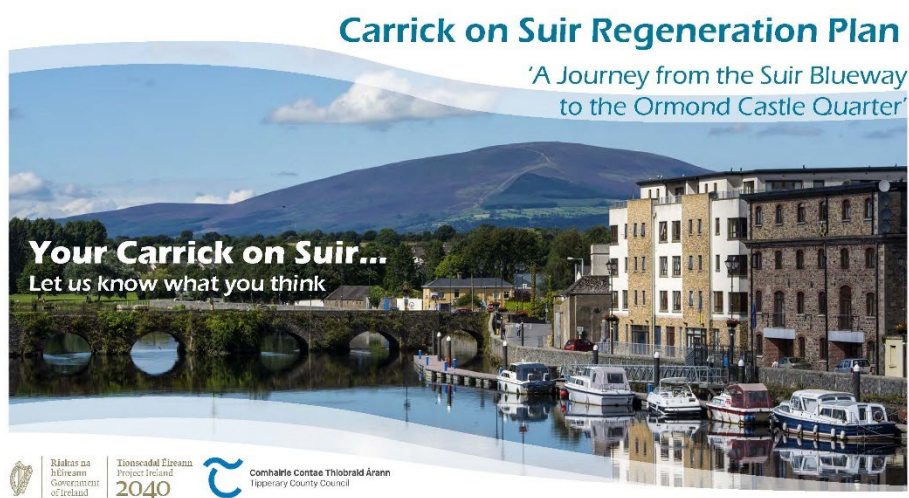
Project Overview





## 1.1 INTRODUCTION & OVERVIEW

Tipperary County Council commissioned Repucon Consulting to undertake an independent tourism impact assessment of the proposed Carrick on Suir Regeneration Plan, titled Carrick on Suir Regeneration Plan ‘A Journey from the Suir Blueway Tipperary to the Ormond Castle Quarter - Delivering Our Community’s Ambition’ (hereafter referred to as the ‘Regeneration Plan’). The objective of the independent assessment is to establish the likely tourism and amenity impact of the Regeneration Plan proposed to be funded under the Rural Regeneration and Development Fund, Department of Rural and Community Development, 2022). The proposed investment would become a strategic enabler of the Suir Blueway Tipperary and Ormond Castle Quarter helping to realise the tourism potential of Carrick on Suir.



The development includes public realm refurbishment and enhancement at Sean Healy Park comprising the development of an arrival point including footpaths and hard paved areas, widening of the Blueway and the development of associated landscaping and services/utilities to serve the proposed and future uses. Also proposed are water craft washing and drying facilities and dedicated parking for those bringing boats/kayaks to the town.

It also includes the extension of the Suir Blueway Tipperary along North Quays to provide cycleway and pedestrian linkages from Sean Healy Park to Ormond Castle and the town centre, as well as the upgrading of Strand Walk with new paving, and the development of a new access to Ormond Castle grounds.

The proposed development will also include public realm refurbishment and enhancement in Carrick on Suir’s town centre. Footpath space will be widened, and traffic calming will be developed through build out, reduced road carriage widths and improved pedestrian crossings. Existing car parks will be improved, and new car parking spaces provided. It is envisaged that the investment will represent a catalyst for extended outdoor amenity and facility usage such as the Carrick on Suir Marina.

The key elements of the proposed Regeneration Plan include;

- Develop Healy Park as Suir Blueway Tipperary/water sports arrival point and community amenity with easy linkages to the town centre/Main Street
- Attractive and easy linkages between Ormond Castle Quarter and Main Street.
- Deliver on the Town Centre First initiative.
- Opportunities to enhance public realm at night and develop the night time economy.
- Develop nodes of activity at key public spaces.
- Regenerate Main Street to promote town centre living and new enterprises.
- Reduce vehicle dominance and improve pedestrian/cycle movement and junction capacity.
- Identify Town Centre location for second Digital Hub.
- Climate action—prioritise opportunities for green design features and regeneration.
- Attractive and easy linkages/orientation for walkers and cyclists between Healy Park, the town centre and the Castle Quarter.
- Promote sustainable travel through enhanced pedestrian and cyclist connectivity with the train station.

## 1.2 PROJECT SCOPE

The following represent the transformative project inputs from a tourism and community amenity perspective.

### 1. Design and Enhancement of the Suir Blueway Tipperary at Carrick on Suir and Sean Healy Park:

**Objective: Increase community and visitor usage of the Suir Blueway Tipperary through enhanced amenities and quality of the trail head experience.**

Area description: Healy Park (Blueway Focal Point), Quayside areas with Laneway connectivity with Main Street.

The Suir Blueway Tipperary is a 53km walking, cycling and watersports trail stretching from Cahir to Carrick on Suir. Carrick on Suir forms the eastern focus of the Suir Blueway Tipperary and has an important role in services provision and in the visitor experience of the area. It is proposed to prepare a design, enhancement and orientation scheme from Sean Healy Park that will consider best practice in user needs i.e. kayakers, cyclists, walkers - This will extend along the quays. An arrival point will be created at Sean Healy Park and an integrated approach to wayfinding (paving, interpretation, lighting, technology, etc), linking the Blueway with the Town Centre and Ormond Castle Quarter.

### 2. Castle Quarter Regeneration

**Objective: Realise the potential of Ormond Castle as a hero product for Carrick on Suir and key attractor to the area adding to Suir Blueway Tipperary and range of things to do and see for visitors.**

Area Description: Castle Street, Strand Walk and Castle Park Enhancement and Biodiversity Scheme.

The Ormond Castle Quarter Plan was collaboratively developed in 2014 by the local community, the OPW, and the Town Council. It identifies the Castle and its Park (2.5ha), and the link to the Main Street (Castle Street) as the flagship heritage and tourism draw of the Town.

The Quarter is centred on Ormond Castle, the only Tudor Manor House in Ireland. The Castle was fully refurbished by the OPW in 2016 and is a key visitor attraction on the Butler Trail. Investment of €270,000 in the castle by Failte Ireland in developing new interpretation for visitors with audio-visuals and technological installations was launched in 2019. The project, delivered in strategic partnership between Failte Ireland, OPW and the Department of Culture Heritage and the Gaeltacht, was later recognised at Institute of Designers of Ireland Awards. In 2019 and 2021 respectively, planning permission was achieved for a new public realm upgrade of Castle Street (link with the Main Street) and for the Castle Park itself, to repurpose it as a high-quality Amenity and Biodiversity Park (co-funded by the Heritage Council and National Biodiversity Plan). The park will also directly integrate with the Suir Blueway Tipperary via a new pedestrian access.

### 3. Town Centre Revitalisation, Enterprise and Mobility

**Objective: Enhancement of the town as a place live and visit.**

Area description: Main Street, Sean Kelly Square, Ball Alley Street and Enterprise and Digital Centre

The Main Street forms a direct link between Ormond Castle Quarter, Sean Kelly Square and Healy Park. This is the commercial, social and cultural hub of the town. The quality of the town centre will

be revitalised by public realm works, increasing the emphasis on active travel (pedestrian/cycle friendly), new opportunities for car-parking away from the Main Street (i.e. St Nicholas Church) and enhanced way-finding i.e. through paving, interpretation, lighting, etc. The tourism impact of the investment will result in improved visitor flow through enhanced orientation around the town and between key visitor experiences. It will motivate visitors to explore the extended town experience and increase the length of stay in the area (i.e. increased visitor dwell time with associated economic uplifts).

A high-quality public realm, and integration of nature-based solutions to urban drainage will help improve the character of the area. The Plan includes for the development of a new phase of the Stable Lane Digital Hub in a building owned by An Post on Main Street, this will accommodate 28 new employment spaces.

A layout plan illustrating the various site elements of visitor experience enhancement and town centre revitalisation to be delivered under the Regeneration Plan is included in Appendix 1.

### 1.3 CARRICK ON SUIR

Carrick on Suir is strategically located on the Limerick to Waterford Revitalisation Network connected by transport links including the national rail network and the N24. It is also located on the Suir Blueway Tipperary downstream of Clonmel, Kilsheelan and Cahir, and has extended heritage associations with Kilkenny, Cashel and Fethard in the region. The town possesses the designation of a Heritage Town, is a member of the Irish Walled Towns Network and is part of the Butler Trail linking it to Kilkenny, with wayfinding in the town delivered through both signposting and downloadable app.

Carrick on Suir is the fourth largest town by population in Tipperary with a population of 5,771 persons. It is strategically located on the ‘Limerick Waterford Transport and Economic Axis’ as designated by the Southern Regional Spatial and Economic Strategy (RSES), (Southern Regional Assembly, 2020).

The population of Carrick on Suir saw a decrease of 6.1% during this period. Surrounding urban areas such as Clonmel and Cashel experienced significant population growth with an overall average increase of 1.2% across the southern region of the county. The population of County Tipperary grew by 0.5% from the period 2011 to 2016, compared to a 3.7% increase in the State overall.

**Table 1.3.1: Population Statistics**

Population	2011	2016	% Change
Carrick on Suir	5,931	5,771	6.1% decrease
Clonmel	15,793	17,140	8.5% increase
Cashel	4,051	4,422	9.1% increase
Tipperary Town	5,310	4,979	6.2% decrease
South Tipperary	88,432	89,500	1.2% increase
Tipperary	158,754	159,553	0.5% increase

(Source : CSO Census Data)

There are 1,979 people residing in the town classed as being ‘At Work’<sup>1</sup>. Of these, a total of 29.4% are employed in the town and 17% are employed elsewhere in Tipperary. 27.1% commute out of the county for employment and the remaining 26.5% are mobile/unclassified workers. The total number of jobs with a fixed location in Carrick on Suir is 1,292. The total number of jobs based in Carrick on Suir represents only 2.9% of all jobs located in the county.

The town has strategic transport linkages due to its close proximity to the Waterford Metropolitan area, and the European ports of Waterford and Rosslare Europort. This highlights the accessibility of the area to ferry port access for visitors in addition to ferry and air access through Cork.

**Table 1.3.2 – Population within one hour**

<b>Carrick on Suir</b>	<b>2019</b>
Population within 60 minutes	490,093
Working population within 60 minutes	294,829

(Source: Tipperary County Council)

It is estimated that the population reach of Carrick on Suir within a 60 minute catchment area is 490,093. The number of people working within 60 minutes is 294,829.

As highlighted in the Regeneration Plan, there is limited workforce interaction with Carrick on Suir from elsewhere in Tipperary. A key challenge for Carrick on Suir as a large town, is the retention of its workforce by the development of new employment opportunities.

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<sup>1</sup> Census 2016

# SECTION TWO

Suir Blueway – A Regional Tourism Catalyst

The lower half of the page is dominated by abstract, geometric shapes. There are several thick, rounded rectangular bars in white and orange, arranged in a dynamic, overlapping pattern that suggests movement and direction. The background is a solid, deep purple color.

## 2.1 MAXIMISING OUR TOURISM ASSETS – ORMOND CASTLE

The delivery of the Regeneration Plan will be the catalyst to maximise the capacity of the towns local tourism amenities to achieve sustainable tourism growth. The recent OPW and Fáilte Ireland investment in Ormond Castle is focused on enhancing the visitor experience onsite. The opportunity to increase dwell time in the area will be contingent on ensuring a wider range of things to do and see in the town. Linking Ormond Castle to the Suir Blueway Tipperary will represent the type of visitor experience that mirrors international tourism trends. Visitors are looking for new ways to experience attractions and the local area. The growth in multi-generational travel requires destinations to deliver experiences in new ways integrating heritage, culture and activities.

Ormond Castle, Carrick on Suir is considered the finest example of an Elizabethan manor house in Ireland. Thomas, 10th Earl of Ormond, built the castle in 1565 in honour of his distant cousin Queen Elizabeth. It boasts a typical manor house layout which includes a magnificent long gallery. The Great Hall stretches almost the whole length of the building and is decorated with some of the finest stucco plasterwork in the country.

The site is open seasonally and currently attracts in the region of 8,000 visitors per annum. Recent investment in audio-visuals and technological installations will result in the growth in the appeal of the site to both the domestic and international markets in addition to strengthened links with the popular Butler Trail.

The Suir Blueway Tipperary is uniquely positioned to develop a strong point of difference to other outdoor trails through its alignment with the Ormond Castle Quarter area, with the two assets physically linked encouraging visitor flow from one attraction via the town centre to the other creating a sustained economic impact on the town centre. It represents an opportunity to develop an integrated outdoor and heritage experience. As a linked visitor proposition, it has the capacity to become a significant catalyst for tourism development for the town. This is reflected in the overarching vision and ambition reflected under objectives to include sustainable tourism development, strategic integration of the local tourism resources and regional linkages and synergies.

## 2.2 UNDERSTANDING BLUEWAYS

Blueways are a relatively new tourism and outdoor recreation offering in Ireland incorporating inland waterways, lakes, rivers and coastal areas around the country. Blueways aim to encourage visitors and the local community experience and enjoy outdoor activities in water locations and use of local water amenities.

They are defined as *“approved and branded multi-activity recreational trails and sites, based on, and closely linked with the water, together with providers facilitating access to activities and experiences”*.

The core premise of Blueway's include;

- Being active in nature
- Exploration of waterscapes
- Service providers enabling easy access for all
- Multi-activity trail options
- Set within the context of places to stay, eat and go
- Enriched by local culture, heritage, arts and visitor attractions
- Responsible recreation within the environment

As users range from experienced adventure activity enthusiasts to novices, a Blueway must offer:

- A mixture of land and water-based activities on developed trails or recreation sites.
- A rich opportunity to experience Irish culture, history and scenery.
- A safe experience.

The preferred locations of Blueways include inland rivers, lakes and waterways, as well as sheltered coastal bays and harbours. Water-based options should only be developed on suitable water courses, focus on easier entry-level activities, provide a guided experience, and follow high safety standards.

A Blueway must offer a complete experience. Water or land-based physical activities are not enough to differentiate Ireland from other destinations. Tourists will be further attracted by a full package of unique cultural and historical attractions and experiences e.g. linked to the Ormond Quarter.

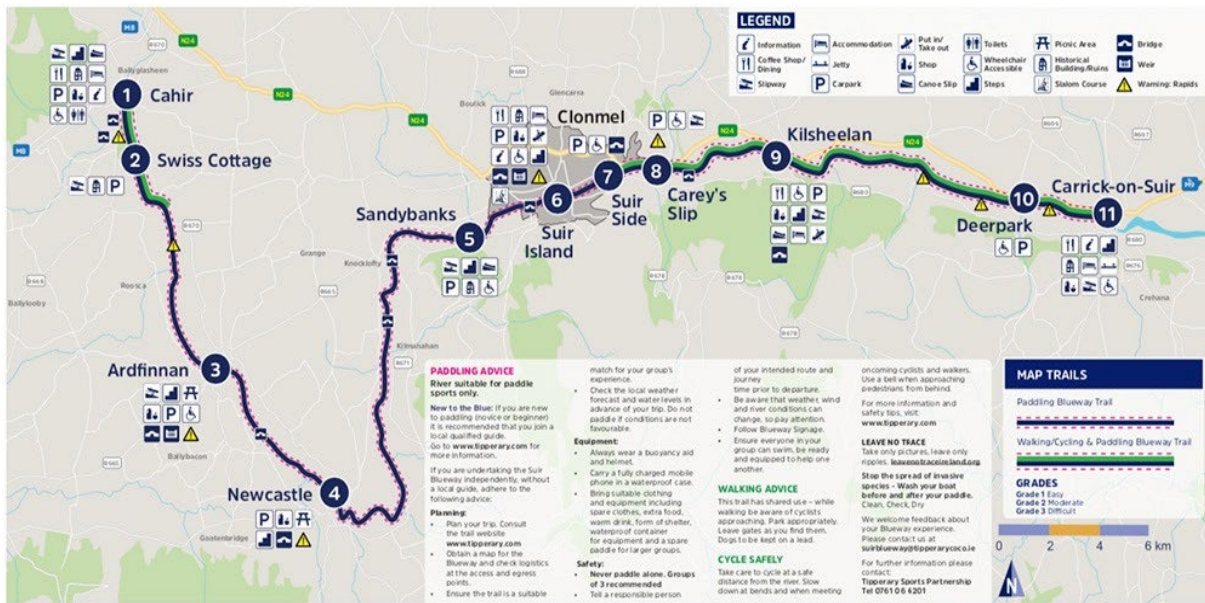
Accreditation Criteria for Blueways combines a visitor focused approach with fundamental safety, technical, access and environmental components. All of these are underpinned by sustainable management techniques and processes.

The Blueway accreditation has been developed across the island of Ireland by Fáilte Ireland, Sport Ireland, Waterways Ireland, Sport Northern Ireland and Tourism Northern Ireland. Official accreditation will ensure that a Blueway will be developed to a consistent high standard from a technical and safety perspective and will deliver best in class sustainable visitor experiences.

The Suir Blueway Tipperary is one of the first Blueways in the world to achieve the accredited status.



## 2.3 SUIR BLUEWAY TIPPERARY



The Suir Blueway Tipperary officially opened in 2019, at a cost of circa. €6 million. The 53km route begins in Cahir and ends in Carrick on Suir, via Clonmel. The greenway element of the route accounts for a 21km walking/cycling trail which runs from Carrick on Suir to Clonmel. The remaining 32km's is made up of a waterway along the River Suir which can be canoed or kayaked. In April 2022 the Suir Blueway Tipperary was announced as one of the world's first accredited blueways, endorsing it as a world class destination for water based and water side activity.

Along the route there are designated walks and attractions for visitors to see. Such attractions include a linear walk from Cahir Castle to Swiss Cottage, a 5km return trip from Suir Side to Carey's Slip, Kilsheelan Bridge to Deerpark, and Deerpark to Sean Healy Park. Visitors can hire bikes from Blueway Bike Hire, located in the North Quay area of Carrick on Suir. It is understood the business is currently expanding the fleet of bikes available.

Canoeists and Kayakers can enter the water along the Blueway at designated access points. Canoe and kayak routes vary from Grade 1 to Grade 3, depending on the experience levels of users. The 2km route from Cahir Castle to Swiss Cottage is considered a Grade 1 route, and the 3km route from Sandybanks slip to Suir Island is considered a Grade 3 route. Canoe and kayak rental is available to visitors at Suir Valley Adventures located in Cahir, with tours and lessons also delivered by the Kilkenny Kayak School and GoPaddle.ie.

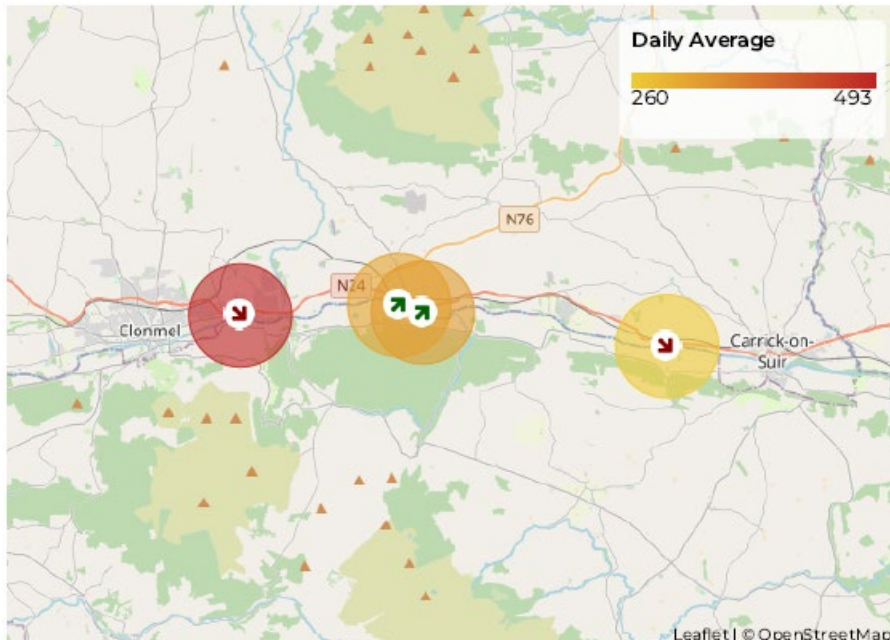
**Table 2.3.1 – Counter Location and Count Data**

Counters Location	Feb 2021 – Feb 2022
Mill Lane	118,320
Killsheelan	114,084
Miloko	94,769

(Source: Tipperary County Council)

Counters placed at the Suir Blueway Tipperary from February 2021 to February 2022 highlight the increasing demand for Blueway usage.

**Figure 2.3.2: Counter Locations and Daily Average usage**



(image source: Tipperary County Council)

The counter placed at Mill Lane recorded the highest number of visitors during this period, welcoming 118,320 cyclists and pedestrians. The Miloko site is the closest counter to the town of Carrick on Suir and attracted more than 94,000 users during the same twelve month period.

## 2.4 FUTURE IMPACT OF LINKING TO THE WATERFORD GREENWAY

The proposed linking of the Waterford Greenway and the Suir Blueway Tipperary represents a tourism project of scale with the potential to transform the town and region. The economic evidence from regional greenways highlights the social and economic impacts that such investments generate. The potential for Carrick on Suir is reflected in the following performance indicators from a sample of regional greenways.

The Great Western Greenway in Mayo follows a 42km route along the line of the old Westport to Achill rail line. The route opened in 2010 with automatic count data showing 80,000 visitors used the route in the first year generating an economic impact of €7.2 million determined from an economic impact assessment (Fáilte Ireland/Fitzpatrick Associates, 2011).

Within 3 years, visitor numbers had increased to 208,000 (2013, Mayo CoCo). 2014 saw continued rise in the popularity of the route with 265,000 visitors with an estimated 25% of users being international tourists. It has been estimated that in region of 200 jobs are now supported from the impact of the facility in guiding, bike rental and the service industry.

The Waterford Greenway officially opened in March 2017 covering a length of 46km between Waterford city and Dungarvan predominantly utilising the route of an old railway line.

Using data obtained from automatic counters and interview surveys, derived user numbers of 106,000 walkers and 146,000 cyclists were determined to have used the greenway in the period March 2017 to December 2017.

The results of interview surveys conducted at various locations on the Waterford Greenway during 2017 are presented in the Waterford Greenway Intercept Survey 2017, Baseline Survey Report December 2017 (Waterford County Council, Aecom, 2017). The report provides an insight into the profile of visitors with key insights including:

- 64% of users lived in County Waterford
- 34% lived elsewhere in Ireland
- 2% of visitors from NI or overseas, with 50% of overseas visitors from the UK
- 44% of cyclists from outside Waterford had hired bikes
- 68% of users living outside Waterford stated the greenway was the primary or only reason for their visit, with 71% not intending to visit any other attraction during the visit.

Following on from the success of the Waterford Greenway, Fáilte Ireland has launched a 'Savour the Greenway' programme which aims to leverage the growing tourism trend for seeking out locally sourced food and culture in order to maximise the appeal of the Waterford Greenway.




Most recently, the Limerick Greenway officially opened in July 2021. By the start of November 2021, Limerick City and Council reported that counters on the route showed that almost 220,000 had visited the greenway since opening, 70% of who were cyclists.

In the UK, the Active Travel and Economic Performance Report (Sustrans, 2017) comments on the economic benefits of cycle tourism which represents a growing, valuable market particularly in rural areas. The report states that long distance cycle routes can generate as much as £30million per year, sustaining up to 600 jobs.

Through their research (*Sustrans Tourism Report, 2013 unpublished*) Sustrans have determined the impact of several long-distance routes. In compiling their report Sustrans considered the differing spend profile of home-based leisure cyclists and overnight tourists on the respective routes with overnight trips accounting for 1% of visits, but 20% of the total value. While these routes are considerably longer and more developed than the Suir Blueway Tipperary they give an indication of the benefits that can be achieved.

## 2.5 A VISION FOR THE BLUEWAY & ORMOND CASTLE

As an output of the Regeneration Project, the overarching ambition and vision for the Suir Blueway Tipperary and Ormond Castle & Quarter is reflected through the following targeted success criteria.

Criteria for Success	Our Vision	Development Focus
<p><b>STRATEGIC</b></p>	<p>A key component and unique trail head of the Suir Blueway Tipperary integrating the Ormond Quarter as part of the visitor experience.</p> 	<p>Blueway product development and marketing strategy focused on target overseas visitor segments of culturally curious and great escapers together with domestic market segments of connected families and unconstrained adults.</p> <p>Creating a destination product that appeals to the international and domestic tourist to grow the local tourism economy.</p>
<p><b>TOURISM AMENITY</b></p>	<p>Introducing domestic and international visitors to Carrick on Suir and new ways to experience the outdoors and heritage resources of the town.</p> 	<p>Innovative engagement with the trail heads linking Sean Healy Park with the Ormond Quarter, and managing and directing visitor flow into the town centre via Sean Kelly Square, Castle Street and the medieval laneways as part of their visit.</p>
<p><b>SUSTAINABLE AND LOW CARBON</b></p>	<p>A resource adopted and used by the community with a low-carbon and sustainable approach throughout.</p> 	<p>A low-carbon and sustainable focus to investment in tourism development and continued investment in the management and maintenance of the Suir Blueway Tipperary</p> <p>Mainstreaming of active travel opportunities, urban greening, biodiversity, and the role of outdoor amenity in quality of life.</p> <p>Development of enhanced focus around the socio-economic opportunities that will be presented through investing in the Suir Blueway Tipperary to create a product comparable to other sites that have enjoyed considerable success. The tourism sustainability approach will be based on the VICE model for sustainable tourism (Visitor, Industry, Community and Environment).</p>
<p><b>SEGREGATED AND SHARED USE</b></p>	<p>A social amenity that is a catalyst for economic development.</p>	<p>Develop community usage and seek innovative ways to grow the use of existing assets such as the 40 berth Town Marina.</p>

Criteria for Success	Our Vision	Development Focus
		<p>Appealing visitor proposition based on creating activities, animation and events of interest in Carrick on Suir linked to the Suir Blueway and trailheads.</p>
<p><b>LOTS TO SEE AND DO</b></p>	<p>Incorporate levels of innovation that will create strong points of differentiation for the Suir Blueway Tipperary in Carrick on Suir.</p> 	<p>Maximise the potential of Ormond Quarter to become a nationally admired approach for trail head innovation.</p> <p>Build on the easy and direct connectivity of the town centre with the Suir Blueway Tipperary and the services and facilities available to visitors.</p>
<p><b>LINKAGES AND SYNERGIES</b></p>	<p>Regional links to the Waterford Greenway and the development of Ireland's Ancient East.</p> 	<p>Development of a connected route between Carrick on Suir and Kilmeaden to link the Suir Blueway Tipperary with the Waterford Greenway and the greater South East greenway network to create a new scale of regional outdoor activity.</p> <p>Sustainable transport linkages with regional greenways and ferry ports to contribute to climate action goals.</p> <p>A focus on synergies with the tourism assets of the Munster Vales, the Butler Trail and Ireland's Ancient East.</p>

# SECTION THREE

Tourism Context



### 3.1 CARRICK ON SUIR TOURISM PROFILE

Carrick on Suir is situated approximately 20 minutes from the M9 Dublin-Waterford. It has direct links to major national cities and tourism hubs including Waterford (30 minutes), Cork (90 minutes), Limerick (105 minutes) and Dublin (120 minutes). The nearest international airport is Cork Airport with Rosslare ferry port located 95km from Carrick on Suir. Rail access from the town includes scheduled Intercity services between Waterford and Limerick Junction enabling onwards connectivity to Cork, Limerick and Dublin. The town possesses the infrastructure and operating environment to become an exemplar for sustainable tourism based on ease of access by public transport, local active travel facilities and approach to community development.

Carrick on Suir has a designation of a Heritage Town and contains a number of visitor attractions including the OPW operated Ormond Castle that has attracted recent site investment designed to grow the appeal of the visitor experience. For centuries Carrick on Suir was a busy river port connecting the agricultural lands of the Golden Vale and the town of Clonmel with the port of Waterford. It continued as a terminal for commercial river traffic, to and from Waterford until the middle of the twentieth century.

Other attractions and amenities in the area include the local Heritage Centre – with funding secured for a new interpretative design under the theme ‘The Tides of Time’. It is proposed that the new centre will be open all year round to visitors and house a state of the art Visitor Information Point where staff can offer advice on the tourist attractions in the area. The Heritage Centre stands on the site of the original 13th century church just off the Main Street and the grounds also host a weekly local Farmers Market.

A 40-berth marina is located in the town centre adjacent to the Suir Blueway Tipperary route, with significant tourism growth potential. The facility is operated by the local authority with marina fees ranging from €5 to €15 for a single night depending on the size of boat. The marina, opened in 2005 and is located on the stretch of the River Suir between the Old and New bridge in Carrick on Suir in the area known as The Pool. The development of the Suir Blueway Tipperary has elevated the opportunity for increased and innovative marina usage based on an emerging focus on water activities in Carrick on Suir.

There are a number of cultural assets in the town, including the Brewery Lane Theatre and Strand Theatres, both with inhouse production companies. The Tudor Artisan Hub in the Castle Quarter is an arts collective showcasing the work of more than 100 artists from the surrounding area. Notable festivals and events in the town include the Clancy Brothers Festival and the Brewery Lane Writers Weekend.

The town is located on Butler Trail, a trail of Tipperary’s Medieval Towns and strong linked to sites across Kilkenny. From an outdoor amenity perspective, the town is located close to the Comeragh Mountains and located on the River Suir Blueway Tipperary. There is one hotel located in the town, The Carrig Hotel, with 23 rooms and 49 beds. Private sector confidence in the future tourism potential of Carrick on Suir is reflected in the planned 40 bedroom hotel for New Street, subject of a recent successful planning application.

The recently developed Fáilte Ireland destination development framework would classify Carrick on Suir as an aspiring destination as part of its regional tourism strategy. This is based on the destination maturity of the town. These include factors such as current levels of recognition within the overseas and domestic markets, range and quality of tourism products and accommodation. Additional

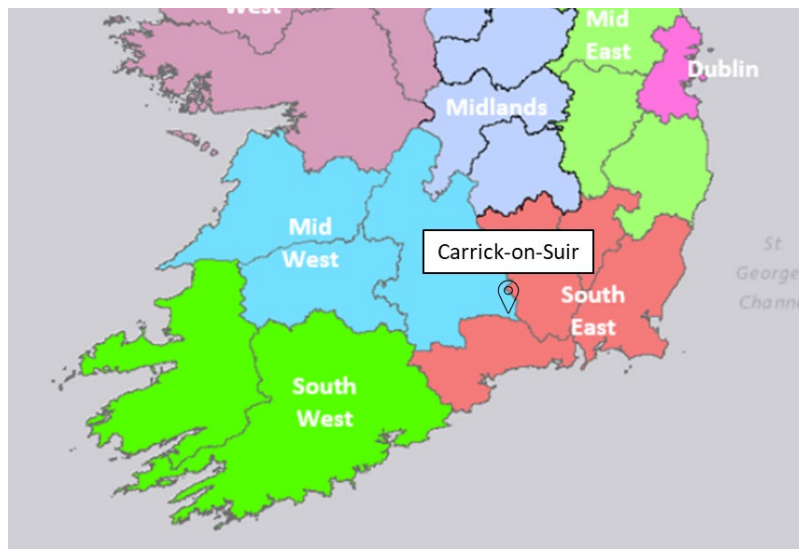
considerations include the scale of services (day and evening time) available for visitors and the strength of local tourism industry networks.

Carrick on Suir occupies an enviable geographic location from the perspective of ease of access to and from major tourism hubs and attractions in Tipperary, Kilkenny and Waterford. It is close to the mountain and upland amenities of the Munster Vales, the Comeraghs, Slievenamon and the Lingaun Valley. Cashel is home to the most visited tourist attraction in Tipperary, the Rock of Cashel, as well as Hore Abbey, the Cashel Folk Village, and the Brú Ború Cultural Centre. The town is linked via the river Suir, the rail line and the N24 to Cahir which features a number of leading attractions including Cahir Castle and the Swiss Cottage. Other accessible sites include the Tipperary Museum of Hidden History and the Fethard Horse Country Experience. Regionally, Carrick on Suir is within 20km of the Waterford Greenway, and within 30km of Waterford City. Feasibility analysis is underway to assess the opportunity to connect Suir Blueway Tipperary to the Waterford Greenway and wider network of greenways developed, or in development, across the South-East. This connection represents a strategic project for the south-east supported by the South East Development Office through the South East Regional Enterprise Plan.

### 3.2 REGIONAL TOURISM PERFORMANCE

Prior to 2018, tourism performance for Tipperary was divided between the Mid-West (North Tipperary) and the South-East (South Tipperary). Since 2018, tourism performance for the county has been reported within the Mid-West region aligning with NUTS2 region boundaries.

Given the geographic proximity of Carrick on Suir to the neighbouring counties in the south-east region, including Waterford and Kilkenny data for the South-East region is also included.





**Table 3.2.1 - Mid-West Tourism Performance**

MID-WEST REGION	2016	2017	2018 <sup>2</sup>	2019
<b>Overseas Tourists</b>	1.215 million	1.387 million	1.497 million	1.432 million
<b>Revenue</b>	€390 million	€444 million	€511 million	€472 million
<b>Spend Per Person</b>	€321	€320	€343	€330
<b>Domestic Trips</b>	832,000	920,000	1.103 million	1.197 million
<b>Revenue</b>	€173 million	€175 million	€172 million	€217 million
<b>Spend Per Person</b>	€208	€190	€156	€181

(Source : Fáilte Ireland)

Data for 2018 for the Mid-West Region as a whole, comprising Limerick, Clare and Tipperary illustrates continued growth between 2017 and 2018 in both overseas visitors and domestic trips. 2019 saw a reduction of 4% in overseas tourists to the region, while domestic trips increased by more than 8%. Overall, the region welcomed more than 2.5 million visitors in 2019.

The breakdown of international visitors to the area is as follows: 37% from Britain, 32% from Mainland Europe, 24% from North America and 7% from other regions of the world.

The main reasons for international tourist's visits to the Mid-West (Limerick, Clare, Tipperary) are for a holiday (66%) or to visit friends and relatives (22%). For the domestic tourist 50% visit for a holiday while 38% are visiting friends/family.

39% of international visitors and 36% of Irish residents visit during the months of July, August and September.

30% of visitors to the Mid-West are couples, 45% travel alone. 61% of international visitors to the Mid-West also visit the South-West, while 34% of visitors to the South-West will also visit the Mid-West.

**Table 3.2.2 – South-East Tourism Performance**

SOUTH-EAST REGION	2016	2017	2018 <sup>3</sup>	2019
<b>Overseas Tourists</b>	946,000	954,000	1.028 million	945,000
<b>Revenue</b>	€273 million	€271 million	€261 million	€261 million
<b>Spend Per Person</b>	€289	€284	€254	€276
<b>Domestic Trips</b>	1.357	1.400 million	1.683 million	1.795 million
<b>Revenue</b>	€235 million	€253 million	€304 million	€312 million
<b>Spend Per Person</b>	€173	€181	€181	€174

Data for 2018 for the South-East Region as a whole, comprising Carlow, Kilkenny, Waterford and Wexford illustrates continued growth between 2017 and 2018 in both overseas visitors and domestic

<sup>2</sup> Prior to 2018 figures North Tipperary included in Mid-West figures and south Tipperary included in the South-East. From 2018 all Tipperary reported in Mid-West figures.

<sup>3</sup> Prior to 2018 figures North Tipperary included in Mid-West figures and south Tipperary included in the South-East. From 2018 all Tipperary reported in Mid-West figures.

trips. 2019 saw a reduction of 8% in overseas tourists to the region, while domestic trips increased by more than 6%. Overall, the region welcomed more than 2.7 million visitors in 2019.

The breakdown of international visitors to the area is as follows: 29% from Britain, 35% from Mainland Europe, 29% from North America and 7% from other regions of the world.

The main reasons for international tourist's visits to the South-East (Carlow, Kilkenny, Waterford, Wexford) are for a holiday (66%) or to visit friends and relatives (22%). For the domestic tourist 50% visit for a holiday while 38% are visiting friends/family.

39% of international visitors and 36% of Irish residents visit during the months of July, August and September.

52% of overseas visitors to the South-East are couples, with 54% of visitors aged over 45 years old. 67% of international visitors to the South-East are on their first visit to Ireland with 66% of visitors on holiday and a further 25% visiting friends and family.

### **3.3 TOURISM IN TIPPERARY**

Tipperary is a centrally located county experiencing high levels of transient tourism. It does not generate the volume of overnight stays comparable to similar counties with a similar natural and heritage asset base. It contains a number of iconic attractions accessible from Carrick on Suir such as the Rock of Cashel, Cahir Castle, and Holycross Abbey. Each site still has further scope to maximise their potential to generate more overnight visits for the county. The county possesses a strong outdoors portfolio with well-established walking trails, Blueways and water assets all set in a spectacular rural environment. The outdoor product base is a key motivating factor for existing visitor demand and the basis for future growth.

A new ten year product development plan created by Tipperary County Council and Tipperary Tourism is designed to address this combined with new public realm investment in towns such as Cashel and Thurles. The county largely rests within Ireland's Ancient East and contains a heritage and outdoors portfolio of experiences that is well positioned to capitalise on projected tourism recovery through this regional brand growth, whilst also maximising opportunities through excellent relationships with adjoining local authorities.

Carrick on Suir is situated within the Munster Vales region, for which a five year Strategic Development Plan (2020-2025) for the development of existing and new tourism experiences in the area has recently been published. The town has been identified within the plan as a gateway to the Munster Vales region.

**Table 3.3.1: Overseas Visitor Spend Compared to National Average**

County	Overseas € per 10,000 population
<b>Tipperary</b>	<b>4.07m</b>
Galway	22.82 m
Limerick	13.39 m
Clare	13.30 m
Cork	11.62 m
<b>National Average</b>	<b>10.34 m</b>
Carlow	7.90 m
Kilkenny	5.54 m
Waterford	5.94 m
Wicklow	5.13 m
Kildare	4.09 m
Wexford	4.07 m
Offaly	2.05 m
Laois	1.65 m

(Source: IBEC, 2018)

In 2018, overseas visitors to Tipperary spent €4.07m per 10,000 population, less than half of the National Average of €10.34 million.

Bordering counties to the west demonstrate a higher overseas visitor spend per population, with Galway, Clare and Limerick all above the National Average. To the east, overseas visitors to Kilkenny spent €5.54m per 10,000 population, while the other bordering inland counties of Laois and Offaly show overseas visitor spend to be less than half of Tipperary.

**Table 3.3.2: Overseas Visitor Spend in Tipperary:**

North Tipperary	2015	2016	2017
Overseas Tourists	51,000	56,000	53,000
Revenue	€25 m	€30 m	€23 m
Spend per Person	€490	€536	€410
South Tipperary	2015	2016	2017
Overseas Tourists	133,000	144,000	139,000
Revenue	€41 m	€46 m	€42 m
Spend per Person	€308	€319	€302
Tipperary (N&S)	2015	2016	2017
Domestic Trips	202,000	202,000	248,000
Revenue	€30m	€30 m	€46 m
Spend per Person	€149	€149	€185

(Source: Fáilte Ireland)

The most recent county-level data from Fáilte Ireland (2015 – 2017) reveals Tipperary attracted 440,000 visitors in 2017 (of which 44% are overseas) accounting for €111 million in visitor expenditure across the county. 59% of visitor spend was generated by international visitors, with 41% from domestic trip.

Fáilte Ireland Accommodation Statistics for 2021 records 22 hotels across the county with a total of 2,127 beds available. Four-star hotel accommodation accounts for 59% of hotel beds in the county, with a further 33% beds in three-star hotels. The first five-star hotel in the county opened in Cashel in March 2022 with 42 beds.

The entire county of Tipperary had 4,130 beds on offer in 2021, with hotels accounting for 2,127 of them.

**Table 3.3.3: Accommodation in Tipperary**

Co. Tipperary	Total	No. of Beds
Hotels	22	2,127
Guesthouses	3	52
B&B's	31	298
Self-catering	13	154
Hostels	1	40
Caravans/Camp sites	7	1,028
Irish Welcome Standard	17	431
<b>Total</b>	<b>94</b>	<b>4,130</b>

(Source: Fáilte Ireland database 2021)

In addition to local Carrig Hotel with 23 rooms and 49 beds, a new 40 bed hotel has recently received planning permission at New Street, Carrick on Suir.

There are 29 properties across Cashel, Clonmel and Cahir catering cater for up to 1,360 visitors. This includes the newly opened five-star Cashel Palace hotel, opening up the luxury market within the county. Nearby in County Waterford, there are 870 rooms across 10 hotels in Waterford City, with a further 267 rooms across four hotels in Dungarvan.

**Table 3.3.4: Accommodation within surrounding towns of Carrick on Suir**

Accommodation Supply	Properties	Rooms	Beds
Cashel	8	62	205
Cahir	9	123	318
Clonmel	12	299	837
Waterford City	10	870	2,200
Dungarvan	4	267	708
<b>Total</b>	<b>43</b>	<b>1,621</b>	<b>4,268</b>

(Source: Fáilte Ireland database 2021)

Fáilte Ireland periodically gathers and publishes visitor number statistics to the leading fee-charging and free attractions across Ireland.

**Table 3.3.5: Top Visitor Attractions in Tipperary**

Attraction	2019
Rock of Cashel	362,657
Cahir Castle	87,333
Hore Abbey	75,380
Brú Ború Cultural Centre	30,000
Swiss Cottage	26,447
Ormond Castle	7,364
Tipperary County Museum	6,288
Fethard Horse Country Experience	3,340

(Source: Fáilte Ireland)

In 2019, the top 5 visited attractions in the whole county were situated in the southern half of Tipperary. The most visited fee-charging attraction was the Rock of Cashel, with 362,657 visitors. The most visited free attraction was Hore Abbey, with 75,380 visitors. The Rock of Cashel is one of Ireland’s leading fee-charging visitor attractions and situated approximately 44km from Carrick on Suir. Since 2015, more than 300,000 people have visited the attraction annually. In 2019, the attraction was the 15<sup>th</sup> highest-ranked attraction in Ireland (10<sup>th</sup> highest outside Dublin). Tipperary County Council is currently working in partnership with Failte Ireland and the OPW to develop Cashel as a destination town including the development of a new Rock of Cashel visitor centre.

Cahir Castle is located within 20km of Cashel, and 37km from Carrick on Suir. Over the three years from 2017 to 2019, an average of 85,000 people have visited the site annually. Hore Abbey is an OPW site on the outskirts of Cashel. The site is not staffed by any OPW guides, with visitor numbers recorded by passive electronic counters. In 2019, there were more than 75,000 visitors recorded to the site. Swiss Cottage is approximately 39km from Carrick on Suir, in the vicinity of Cahir. Visitor growth at the site increased in 2018 to more than 25,000 for the first time in the site’s history.

Carrick on Suir’s location on the Butler Trail opens up further tourism development opportunities. The Butler Trail is a journey through time that takes visitors around the towns of Cahir, Clonmel and Carrick on Suir, as well as locations in the north of the county, such as Nenagh, Thurles and Roscrea. The trail includes some of Tipperary’s medieval heartlands, in the form of castles, mansions, churches and towns, which date back as far as the 12<sup>th</sup> century. The key attractions along this trail in the county include Ormond Castle in Carrick on Suir, the Main Guard in Clonmel, Cahir Castle and Swiss Cottage in Cahir, and the Roscrea Heritage Centre in Roscrea. From the trail of the Butler’s can also be extended to Kilkenny Castle, home to the Butler family following their move from Ormond Castle.

Other regional opportunities include the proximity of Carrick on Suir to Kilkenny and Waterford. The leading fee-charging visitor attraction in the neighbouring county of Kilkenny is Kilkenny Castle, located in the centre of Kilkenny City. Kilkenny Castle welcomed 392,950 visitors in 2018, a figure that increased to 401,028 visitors in 2019. Kilkenny Castle is located within 45km of Carrick on Suir.

The House of Waterford Crystal, located in Waterford City, welcomed 210,000 in 2018, a figure that dropped slightly in 2019, to 209,600. The House of Waterford Crystal is located within 27km of Carrick

on Suir. Other popular attractions in Waterford within close proximity to Carrick on Suir include the Viking Triangle, which is 27km from Carrick on Suir, and the Waterford Greenway, which is only 22km from Carrick on Suir. The Waterford Greenway welcomed 284,014 visitors in 2019, breaking the record from the previous year of 283,503.

### **3.4 TOURISM POLICY & PLANS**

The project is aligned with the following policy documents and strategic plans designed to support the development of tourism nationally, regionally and locally.

#### **Ireland 2040: Our Plan**

Ireland 2040: Our Plan sets out the county's submission to the National Planning Framework delivering the strategic platform for Project Ireland 2040. The report identifies a number of strategic aims for the county sought to be delivered under the National Planning Framework including the protection of enhancement and protection of built heritage for future generations and the re-vitalisation of attractive villages providing employment opportunities for sectors of the community.

#### **National Planning Framework**

One of the principal purposes of preparing the NPF is to allow shared national development goals, including improved living standards, quality of life, prosperity, competitiveness and environmental sustainability, to be more broadly considered. Ireland 2040 Plan is a high-level document that will provide the framework for future development and investment in Ireland. It is the overall plan from which other, more detailed plans will take their lead, hence the title, National Planning 'Framework', including city and county development plans and regional strategies. The National Planning Framework will have statutory backing.

As a strategic development framework, Ireland 2040 - Our Plan sets the long-term context for the country's physical development and associated progress in economic, social and environmental terms and in an island, European and global context.

The vision for Ireland in 2040 is:

- For the highest possible quality of life for people and communities, underpinned by high quality, well managed built and natural environments.
- Sustainable self-reliance based on a strong circular economy and significant progress towards a low carbon, climate-resilient society while remaining an open, competitive and trading economy.

The relevant National Policy Objectives in support of this project are set out hereunder:

- National Policy Objective 16 - Target the reversal of rural decline in the core of small towns and villages through sustainable targeted measures that address vacancy and deliver sustainable reuse and regeneration outcomes.
- National Policy Objective 17 - Enhance, integrate and protect the special physical, social, economic and cultural value of built heritage assets through appropriate and sensitive use now and for future generations.

- National Policy Objective 18a - Support the proportionate growth of and appropriately designed development in rural towns that will contribute to their regeneration and renewal, including interventions in the public realm, the provision of amenities, the acquisition of sites and the provision of services.
- National Policy Objective 21 - Enhance the competitiveness of rural areas by supporting innovation in rural economic development and enterprise through the sustainable diversification of the rural economy into new sectors and in particular those with a low or zero carbon output.
- National Policy Objective 22 - Facilitate the development of a National Greenways/Blueways and Peatways. Strategy which prioritises projects on the basis of achieving maximum impact and connectivity at national and regional level.
- National Policy Objective 27 - Ensure the integration of safe and convenient alternatives to the car into the design of our communities, by prioritising walking and cycling accessibility to both existing and proposed developments; and integrating physical activity facilities for all ages.

Empowered Rural Communities – Rural areas play a key role in defining our identity, in driving our economy and our high-quality environment and must be a major part of our country’s strategic development to 2040. In addition to the natural resource and food sector potential as traditional pillars of the rural economy, improved connectivity, broadband and rural economic development opportunities are emerging which offer the potential to ensure our countryside remains a living and working community.

Rural Development – Actions:

- Implementation of the actions outlined in the Action Plan for Rural Development.
- Implementation of a targeted smart growth initiative to enable opportunities to secure the regeneration and re-purposing of rural towns and villages weakened by the structural changes in rural economies and settlement patterns.
- Investment in greenways and Blueway’s as part of a nationally coordinated strategy.

### **Tourism Policy ‘People, Place and Policy – Growing Tourism to 2025’**

This policy was published in 2015 and recognises the importance of investing in the visitor experience in order to continue to grow tourism including investment in facilities for visitor activities such as greenways and other outdoor recreational activities.

Section 1.3 notes that in supporting investment in the visitor experience including the development of Greenways it has seen an improvement in our place by the investment in our physical visitor attractions.

### **Our Rural Future - Rural Development Policy 2021-2025**

Published in April 2021, Our Rural Future provides a framework for the development of rural Ireland over the next five years. The policy contains a portfolio of objectives set out across a number of chapters including enhancing participation and resilience in rural communities and supporting employment and careers in rural areas. The role of culture, heritage and history is recognised, noting

that heritage is one of the keys to sustaining and regenerating rural areas. The vital role that heritage plays in rural areas will be further supported through the publication of Heritage Ireland 2030 under the vision of valuing and protecting heritage.

### **Strategy for the Future Development of National and Regional Greenways (2018)**

The objective of the Greenway strategy is to assist in the strategic development of nationally and regionally significant Greenways in appropriate locations constructed to an appropriate standard in order to deliver a quality experience for all Greenways users. It also aims to increase the number and geographical spread of Greenways of scale and quality around the country over a 10 year period with a consequent significant increase in the number of people using Greenways as a visitor experience and as a recreational amenity.

### **Blueway Management and Development Guide:**

This Blueway Management and Development Guide has been designed as a resource to:

- Assist developers to develop, manage and promote Blueways more effectively.
- Outline the accreditation criteria, process and support mechanisms.
- This Guide lists the fundamental components of a successful Blueway, which include experience, safety, technical, conservation/environment, sustainability, and access.

### **Get Ireland Active! The National Physical Activity Plan for Ireland – Healthy Ireland**

The aim of this Plan is to increase physical activity levels across the entire population thereby improving the health and wellbeing of people living in Ireland, where everybody will be physically active and where everybody lives, works and plays in a society that facilitates, promotes and supports physical activity and an active way of life with less time spent being sedentary.

The focus of the plan is to;

- create increased opportunities for people to be active in ways which fit in to everyday lives and which suits individual needs, circumstances and interests.
- removing the barriers which people face to being active and encouraging people to recognise how to overcome those barriers.
- enhancing cross-sectoral cooperation at national, local and community level to encourage physical activity at every level.
- encouraging a supportive environment where physical activity becomes normal.
- promoting good practice and finding new models of participation which get more people active.



### Tipperary County Development Plan 2022-2028

This project is entirely consistent with and contributes to objectives of the Tipperary County Development Plan 2022-2028.

The following objectives are particularly relevant:

**SO-7:** To protect, enhance and connect areas of natural heritage, blue and green infrastructure and waterbodies, for quality of life, biodiversity, species and habitats, while having regard to climate change adaptation and flood risk management measures.

**SO-09:** To enhance connectivity and promote sustainable transport, through the integration of land-use and transport planning and promotion of and prioritisation of public transport and walking and cycling.

**SO-10:** To protect existing infrastructural assets and utilities and support investment in strategic infrastructure both at the county, and the regional level thereby ensuring Tipperary's access to key services for economic growth and resilience.

This plan also focuses on projects which are specific to Carrick on Suir, such as the Carrick on Suir Regeneration Plan 2021 (RRDF Category 2). The basis of this regeneration plan proposes that the Suir Blueway Tipperary better interconnects with the town and its streets and routes.

Section 14.0 of the Tipperary County Development Plan 2022-2028 focuses on Green and Blue Infrastructure, and explains the importance in recognising, supporting and interconnecting (where feasible) green and blue assets, particularly those in urban areas, where public spaces, private gardens, cemeteries, urban streams and derelict land are often undervalued for their natural service. It is a stated objective of the Plan to connect the Suir Blueway Tipperary to the Waterford Greenway.

**SO-14:** Intercountry Routes: Link between the Suir Blueway Tipperary (Carrick on Suir) and the Waterford Greenway

The Tipperary County Development Plan 2022-2028 also examines the importance of the Limerick – Waterford Transport and Economic Network. In this respect, the Council, in collaboration with the Southern Regional Assembly, and Limerick and Waterford County Councils, will seek to build on the multi-modal connectivity and economic strengths of Clonmel, Carrick on Suir, Tipperary Town, Cahir and Limerick Junction and their synergies with Limerick and Waterford.

### Tipperary Transforming – Tourism Product Development Plan 2020-2030

The purpose of this plan is to assist the Local Authority to deliver on ambitions to significantly improve the visitor experience in the county developed through the three overarching themes of Heritage, Landscape and Water. The Plan is underpinned by the principles of responsible sustainable tourism with responsible development a hallmark of the plan and a signature action for Tipperary to be a national leader in responsible tourism. Targets for the plan include:

- An increase of 50% in people employed (full-time or part-time) in the county tourism economy;
- An increase of 100% of overnighting visitors to the county;
- Growth of 75% in the number of international visitors; and
- €150 million investment in tourism and related offerings in the county over the next ten years

Among the projects identified within the Plan, development of The Butler Trail connecting a number of towns and villages across the county relating the Butler family impact across five centuries in the county. The proposed project identifies that ‘towns and villages need to be supported in building their infrastructure and facilities to encourage visitors to stay longer.’

### **Developing the Tourism Potential of the Munster Vales – Strategic Tourism Development Plan 2020-2025**

The plan sets out a five year strategic tourism development plan for the Munster Vales as a destination and support development of both existing and new visitor experiences to encourage more visitors to stay in the area. Carrick on Suir is identified as a gateway to the Munster Vales with the opportunity to develop a Munster Vales Way starting/finishing in the town.

### **Strategic Tourism Marketing, Experience & Destination Development Plan 2016-2021**

The overall objective of this plan was to enable growth for Tipperary as a unique tourism destination, with an action plan to be delivered under the management of the Tipperary Tourism Company. Key aims of the Plan included development and promotion of tourism experiences, encouraging industry sustainability and growth, building capacity and identifying and building synergies between the different tourism products.

### **Tipperary Climate Adaptation Strategy 2019-2024**

The Climate Adaptation Strategy takes on the role as the primary instrument at local level to:

- ensure a proper comprehension of the key risks and vulnerabilities of climate change
- bring forward the implementation of climate resilient actions in a planned and proactive manner and,
- ensure that climate adaptation considerations are mainstreamed into all plans and policies and integrated into all operations and functions of Tipperary County Council.

The proposed Regeneration Plan places a strong focus on climate mitigation adaptation measures throughout and in particular on the social and economic role of sustainable and responsible tourism.

### **Tipperary Local Economic and Community Plan 2015-2020:**

This project is consistent with many of the action areas of the Tipperary Local Economic and Community Plan 2015-2020.

The key objective of the Local Economic and Community Plan (LECP) is to promote a more integrated and targeted approach to addressing the strategic social, community and economic issues facing the County of Tipperary in a way that meets the priority needs of the community. What constitutes the needs of the community is heavily influenced by the views sought from the communities themselves through the LECP consultation processes, but within the context of Government Policies and priorities.

The following objectives are particularly relevant:

**EP 1:** To promote and enable appropriate economic development opportunities throughout the county.

**EP 2:** To improve the sustainability of the County’s energy use by supporting enterprises in energy efficiency reduction/improvements and by growing the renewable energy enterprise sector.

**CFP 1:** Improve the quality of life and well-being for communities through supporting prioritized community infrastructural development and providing prioritized relevant support services.

### **Carrick on Suir Town Development Plan 2013 (As extended):**

The vision of this plan is as follows:

“To develop Carrick on Suir as a balanced settlement, centred on a strong and vibrant town centre, to build on the location and heritage strengths of the town; to develop a sustainable tourism industry in order to offer a high quality of life for residents and to support the wider hinterland from an economic and service perspective. To promote the town as an attractive settlement in which to do business, reside, visit, recreate in and enjoy so as to balance the demands of a vibrant economy with the need for a healthy and sustainable environment and to ensure the protection of the unique built, cultural and natural heritage of the area”.

### **Carrick on Suir Town Walls Conservation, Management and Interpretation Scheme (2013)**

Key stakeholders for this plan are all members of the Local Community, CoSDA, CoSTDEC, South Tipperary Development Company, South Tipperary County Council, Carrick on Suir Town Council and the Heritage Council and these stakeholders are represented by the Carrick on Suir Town Walls steering group.

The purpose of the Plan is to accurately record and describe the medieval town wall and to inform the stabilisation, restoration and enhancement of the wall. The Plan supports the town as a member of the Irish Walled Towns Network (IWTN). It is also used as a tool to inform and to develop a deep appreciation of the historic nature and heritage of the town.

### **The Ormond Castle Quarter Improvement Scheme (2014)**

The Ormond Castle Quarter Improvement Scheme was adopted by Carrick on Suir Town Council in 2014 after public consultation processes. This Plan sets out key objectives for the redevelopment of the Ormond Castle Quarter area and its importance to heritage and tourism in the town. It acts as a catalyst and framework for funding and development. Key objectives are better connectivity of the Castle with the Main Street, the upgrading of the Castle Park as a tourism asset and the connectivity of the area with the River Suir and the multiple opportunities presented by the presence of the waterway. This Plan realises the scope that is there to improve the riverside amenity and to enrich the outdoor recreational offering of the town with Ormond Castle at its core.

### **A ‘Carrick on Suir Vision 2030 – Strategic Plan’ (COSTEDC 2016)**

This strategic, collaborative plan was launched in October 2016 and a key theme of the plan was the preservation of the town centre as an active location for commerce and recreation. There are 13 projects listed within this plan and one of particular interest is developing Greenway and Blueway infrastructure to support tourism and social development in the town.

### **Green and Blue Infrastructure Master Plan Roadmap for Tipperary Waterways (2020)**

This Green and Blue Infrastructure Masterplan Roadmap for Tipperary Waterways has been developed to enhance green and blue infrastructure within the county and maximise the environmental, social and economic benefits that can be gained from the increased protection and management of the environmental resource. The River Suir is a critical component to the Green and Blue Infrastructure Master Plan.

The Green and Blue Infrastructure Masterplan Roadmap was developed as part of the EU INTERREG Europe 'SWARE' (Sustainable heritage management of Waterway Regions) Project, of which Tipperary County Council is one of six EU partners.

The outcomes from this Masterplan Roadmap include:

- Identification and mapping of major eco-systems (including associated eco-systems – woodland and wetland) and identification of current eco-system services.
- Identification and mapping of existing green and blue infrastructure.
- Planning for green and blue infrastructure.
- Setting out mechanisms for implementation, including policy, projects and frameworks.

# SECTION FOUR

Projected Tourism Impact



#### 4.1 TOURISM PERFORMANCE – PROMOTABLE VISITORS

The following analysis outlines the projected tourism impact arising from the proposed Regeneration Plan. The analysis focuses on the potential impact of sustained growth in ‘promotable’<sup>4</sup> visitor numbers to the town through the enhancement of local amenities and a new strategic sustainable tourism development focus for Carrick on Suir.

The visitor numbers reflect the combined impact of increased usage of the Suir Blueway Tipperary and growth in annual visits to Ormond Castle among domestic and international visitors. The consequent impact from the Regeneration Plan will result in an enhancement of the local facilities, growth in local tourism enterprise development and an increase in local accommodation stock. These will be central to supporting sustainable tourism growth in Carrick on Suir.

The completion of the Regeneration Plan, including enhancements to the Suir Blueway Tipperary is projected to attract 94,000<sup>5</sup> visitors and amenity users in year one. These projections are comprised of domestic and international visitors in addition to local community usage of the trails and enhanced amenities. The baseline year one (estimated to be 2025) numbers include 63% amenity users from the local community. This figure reflects average community usage figures from the Western and Waterford Greenways. Domestic visitors represent 35% of the total, with international visitors accounting for the remaining 2%.

**Table 4.1.1 – Breakdown of Users and Promotable Visitors**

	Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10 (cum.)	Years 11-15 (cum.)	Years 16-20 (cum.)	Years 21-25 (cum.)
Visitor numbers (incl. community use and promotable visitors)	94,000	103,400	113,740	121,702	127,787	741,408	891,854	1,003,598	1,108,053
Local	63.0%	60.0%	56.0%	53.0%	50.0%	50.0%	50.0%	50.0%	50.0%
<b>Domestic</b>	<b>35.0%</b>	<b>36.0%</b>	<b>37.5%</b>	<b>37.5%</b>	<b>37.5%</b>	<b>35.0%</b>	<b>35.0%</b>	<b>35.0%</b>	<b>35.0%</b>
<b>International</b>	<b>2.0%</b>	<b>4.0%</b>	<b>6.5%</b>	<b>9.5%</b>	<b>12.5%</b>	<b>15.0%</b>	<b>15.0%</b>	<b>15.0%</b>	<b>15.0%</b>

In year one the promotable visitor market is driven by domestic visitors accounting for 95% of overnight and day visits in the destination. By year five the overseas market is projected to grow to 12.5% from its year one level of 2% as the reputation and awareness of Carrick on Suir as a visitor destination becomes established.

<sup>4</sup> Promotable Visitors are defined as domestic and international tourists attracted to Carrick on Suir to consume one or many tourism experiences including local attractions, amenities or ancillary services. Subsequent commentary provides separate analysis of the promotable visitor economic impact. For the purposes of the tourism impact analysis, no economic value is associated with community usage of the local amenities. Economic impact analysis and commentary is specific only to ‘promotable’ tourism activity in the area i.e. domestic and international visitors not residing in the area.

<sup>5</sup> In the absence of local tourism numbers, the estimates of visitor numbers for the baseline Year 1 visitor numbers have incorporated Suir Blueway counter data at the Miloko counter between February 2021 – February 2022 supplied by Tipperary County Council, together with 2019 visitor numbers reported by OPW to Ormond Castle. Domestic and international visitors estimated based on pre Covid-19 regional tourism performance.

**Table 4.1.2 – Users and Promotable Visitor Numbers by Category**

	Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10 (cumulative)	Years 11-15 (cumulative)	Years 16-20 (cumulative)	Years 21-25 (cumulative)
Total Visitor numbers (incl. community use and promotable visitors)	94,000	103,400	113,740	121,702	127,787	741,408	891,854	1,003,598	1,108,053
<b>Domestic Visitors</b>	<b>33,041</b>	<b>37,224</b>	<b>42,539</b>	<b>45,760</b>	<b>47,920</b>	<b>259,493</b>	<b>312,149</b>	<b>351,259</b>	<b>387,819</b>
<b>International Visitors</b>	<b>1,739</b>	<b>4,136</b>	<b>7,507</b>	<b>11,440</b>	<b>15,973</b>	<b>111,211</b>	<b>133,778</b>	<b>150,540</b>	<b>166,208</b>
<b>Total Annual Promotable Visitors</b>	<b>34,780</b>	<b>41,360</b>	<b>50,046</b>	<b>57,200</b>	<b>63,893</b>	<b>370,704</b>	<b>445,927</b>	<b>501,799</b>	<b>554,027</b>

Projected growth in visitor numbers to the destination is driven primarily through visitors to the Blueway as evident in comparable areas with product investment in Greenways. The overall promotable numbers also reflect targeted growth projections to Ormond Castle following recent investment. Visitor numbers of approximately 8,000 were recorded in 2019 during the seasonal opening of the castle.

#### 4.2 TOURISM IMPACT – PROMOTABLE VISITORS

The projected tourism impact assessment is based on achieving the following day visits and overnight stays from promotable visitors.

**Table 4.2.1 – Overnight and Day Visitor Numbers - Promotable Visitors**

	Year 1	Year 2	Year 3	Year 4	Year 5	Years 6-10 (cum.)	Years 11-15 (cum.)	Years 16-20 (cum.)	Years 21-25 (cum.)
Total numbers (incl. community use and promotable visitors)	94,000	103,400	113,740	121,702	127,787	741,408	891,854	1,003,598	1,108,053
Total Overnights	11,280	13,442	15,924	17,038	19,168	111,211	133,778	150,540	166,208
Domestic Visitor Bednights	10,716	12,098	13,535	13,631	14,376	77,848	93,645	105,378	116,346
International Visitor Bednights	564	1,344	2,389	3,408	4,792	33,363	40,133	45,162	49,862
Total Day Visitors	23,500	27,918	34,122	40,162	44,725	259,493	312,149	351,259	387,819
Domestic Day Visitors	22,325	25,126	29,004	32,129	33,544	181,645	218,504	245,881	271,473
International Day Visitors	1,175	2,792	5,118	8,032	11,181	77,848	93,645	105,378	116,346

Overnight visitors account for 12% of total visits in year one with growth to year five accounting for accommodation stock levels in the town. The anticipated growth in local accommodation supply is

reflected in subsequent annual growth in overnight stays in the area. Day visitors are projected to account for an initial 25% of all visitors in year one, growing to 35% by year five. The most significant growth will be through growing the appeal of the town to international visitors. By year five international visitors will be responsible for almost 5,000 bednights and over 11,000 day visits.

Total overnights stays grow from 11,280 in year one to in excess of 19,000 by year five. The anticipated appeal of Carrick on Suir for day visits to Ormond Castle, Suir Blueway Tipperary and the town experience will see an increase from 23,500 to 44,725 by year five.

**Table 4.2.2 – Projected Cumulative Overall Promotable Visitor Numbers**

	<b>Years 1-5</b>	<b>Years 6-10</b>	<b>Years 11-15</b>	<b>Years 16-20</b>	<b>Years 20-25</b>	<b>Years 1-25</b>
Total numbers (incl. community use and promotable visitors)	560,629	741,408	891,854	1,003,598	1,108,053	4,305,542
Total Overnights	76,852	111,211	133,778	150,540	166,208	638,589
Domestic Visitor Overnights	64,355	77,848	93,645	105,378	116,346	457,571
International Visitor Overnight	12,496	33,363	40,133	45,162	49,862	181,018
Total Day Visits	170,427	259,493	312,149	351,259	387,819	1,481,147
Domestic Day Visits	142,128	181,645	218,504	245,881	271,473	1,059,632
International Day Visits	28,299	77,848	93,645	105,378	116,346	421,515

Over the first five years following completion of the Regeneration Plan, Carrick on Suir will generate a total of 77,000 bednights as a result of the investment while attracting over 170,000 day visitors. Extending the period of analysis to 25 years will result in the town generating over 638,000 bednights in addition to attracting 1.48 million day visitors to the town over 25 years.



## Summary of Economic Impact

**Table 4.2.3 - Economic Impact of Promotable Visitors: Years 1 – 5 (NPV<sup>6</sup>)**

<b>Economic Tourism Impact</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
Visitor Numbers (incl. community use and promotable visitors)	94,000	103,400	113,740	121,702	127,787
Total Domestic Visitors	33,041	37,224	42,539	45,760	47,920
Total International Visitors	1,739	4,136	7,507	11,440	15,973
Annual Bednights	11,280	13,442	15,924	17,038	19,168
Direct Promotable Visitor Expenditure	€1,541,058	€1,763,804	€2,032,400	€2,169,051	€2,336,951
<b>Projected economic impact</b>					
Exchequer Returns (based on total expenditure impact)	€1,029,118	€1,177,868	€1,357,237	€1,448,492	€1,560,616
Exchequer Returns (based on direct visitor expenditure)	€490,056	€560,890	€646,303	€689,758	€743,150
Annual Direct Employment (FTE's)	19	23	27	30	34
Projected Total GVA Impact	€2,580,923	€2,953,972	€3,403,811	€3,632,669	€3,913,864

The Test Discount Rate (TDR) for use in cost benefit analysis and cost effectiveness analysis of public sector projects is currently 4%. This is the rate in real terms is applied to the project's future costs and benefits expressed in constant prices. The projections adopted within this analysis includes a series of increases in overnight and day visitor spend in Years 6, 11, 16 and 21. This factors in the projected maturity of the destination with increased dwell time and associated capacity to attract higher levels of visitor expenditure in the area.

In year one the total visitor expenditure impact (including direct, indirect and induced expenditure) is projected at €3.26 million (NPV), rising to €4.91 million (NPV) in year five.

Bednights in the Carrick on Suir area are projected at 11,280 in year one increasing to 19,168 in year five Exchequer Returns based on the level of projected economic activity in year one are projected at €1.03 million (NPV) increasing to €1.56 million (NPV) by year five. Exchequer Returns associated with direct expenditure total €490,000 in Year, rising to €743,000 in year five.

<sup>6</sup> Test Discount rate of 4% applied as per The Public Spending Code

**Table 4.2.4 – Overall Economic Impacts Years 1-25 (NPV)**

Economic Tourism Impact	Years 1-5	Years 6-10	Years 11-15	Years 16-20	Years 21-25	Years 1-25
Visitor Numbers (incl community use and promotable visitors)	560,629	741,408	891,854	1,003,598	1,108,053	4,305,542
Total Visitor Expenditure Impact	€20,670,853	€27,808,825	€31,526,355	€31,626,123	€31,060,070	€142,692,226
Bednights	76,852	111,211	133,778	150,540	166,208	638,589
International Expenditure	€1,576,341	€3,972,689	€4,503,765	€4,518,018	€4,437,153	€19,007,966
Exchequer Returns	€6,573,331	€8,843,206	€10,025,381	€10,542,041	€10,353,357	€48,940,713
Exchequer Returns (based on direct expenditure)	€3,130,158	€4,211,051	€4,773,991	€4,789,099	€4,703,382	€21,607,680
Direct Visitor Expenditure	€9,843,263	€13,242,298	€15,012,550	€15,060,058	€14,790,509	€67,948,679
Average Annual Direct Employment (FTE)	27	43	60	73	87	58
Projected Total GVA Impact	€16,485,240	€22,177,853	€25,142,625	€25,222,191	€24,770,758	113,798,666

An assessment of the extended economic impacts over the first five years after completion of the project suggests a total of €20.67 million (NPV) in tourism revenue for the area<sup>7</sup> generated by the domestic and overseas visitors to the locality. This is projected to increase to €27.81 million (NPV) between years six to ten, and €31.53 million between years 11 to 15. Over the 25 year assessment period there is a projected tourism revenue of €142.7 million (NPV).

Over the initial five years approximately 77,000 bednights will be generated for the locality, increasing to 111,000 between years six to ten and approximately 134,000 between years 11 to 15. Between years 16 to 20 there will be a projected 150,000 bednights generated, increasing to 166,000 over the five year period between years 21 to 25. Over the 25 year assessment there are projected to be almost 640,000 bednights generated.

The value of overseas tourists to the wider area is projected to be €1.58 million over the initial five years, increasing to €3.98 million (NPV) and €4.50 million (NPV) in years six to ten and years 11 to 15 respectively. In the five year period from years 16 to 20 overseas tourists are projected to be generating €4.52 million (NPV), with a further €4.44 million (NPV) between years 21 to 25. Over the 25 year assessment period overseas tourist expenditure is projected to be €19.01 million (NPV).

It is estimated that Exchequer Returns based on the level of projected economic activity will be €9.84 million (NPV) with exchequer returns on direct expenditure of €3.13 million (NPV) over the initial five year period. Exchequer Returns based on the projected economic activity over the initial 25 years are projected at €48.94 million (NPV) with returns on direct expenditure projected at €21.61 million (NPV) over the same period.

Direct visitor expenditure over the initial five years is projected at €9.84 million (NPV), increasing to €13.24 million (NPV) between years six to ten. The projected direct visitor expenditure of the 25 year assessment period is €67.95 million (NPV).

<sup>7</sup> Overnight and day visitor expenditure is consistent with Fáilte Ireland indicators and tourism impact primary research conducted by Repucon Consulting.

Direct expenditure by visitor is projected to support an average of 27 direct jobs over the initial five years after completion, increasing to an average of 43 jobs annually in years six to 10. Between years 11-15 an average of 60 direct jobs a year are supported, rising to an average of 83 jobs per year in years 16 to 20, and 87 jobs per year over the final five years of assessment.

The projected total GVA impact cumulative impact over years one to five is €16.49 million (NPV). Between years six to ten total GVA impact increases to a cumulative €22.18 million (NPV), with a projected €25.14 million (NPV) generated over years 11 to 15. Between years 16 to 20 total GVA impact increases to a cumulative €25.22 million (NPV), with a projected €24.77 million (NPV) generated over years 21 to 25. The cumulative total GVA impact over the 25 year assessment period is projected to be €113.80 million (NPV)

**Table 4.2.5 – Tourism Employment Impact – Promotable Visitors (Years 1-5)**

	Year 1	Year 2	Year 3	Year 4	Year 5
Total Tourism Employment Direct	19	23	27	30	34
Total Employment Indirect	13	15	18	20	22
Total Employment Induced	8	10	12	13	14
Total Employment Impact	40	47	57	63	71

This level of expenditure is projected to support 19 direct jobs in year one. Increasing expenditure is projected to create an additional 4 direct jobs in year two supporting a total of 23 direct jobs. By year five expenditure is projected to support a total of 34 direct jobs (Full Time Equivalents (FTEs)). When the multiplier impacts are accounted for this has a total employment impact of 40 in year one, rising to a total of 71 in year five.

### 4.3 PROJECTED SOCIAL IMPACT – COMMUNITY USE

#### 1. Valuation of sports and physical activity

Social Return on Investment is a methodology to measure intangible goods (services and uses of amenities). The core premise is valuing the use of facilities that contribute to the users’ social wellbeing. The measurement value of the Suir Blueway Tipperary is based on the users willingness to pay a notional economic amount to gain the benefits they associate with using the facilities. In the case of the Suir Blueway Tipperary amenity the users would place a value on the social, psychological and physical benefits derived from one hour of usage of the facilities (i.e. a Willingness to Pay technique). The studies employed in this analysis adopt the WTP values placed by participants in the programmes comparable to what activities may be undertaken on the Suir Blueway Tipperary (Fit for Life, Meet and Train) in addition to parents’ valuation of one hour’s participation for their child in physical activity. This provides an economic valuation that is applied to generate a social valuation and the ability to analyse the social return on investment. This is conducted in parallel with the economic impact analysis which only focused on projected visitors to the area.

The willingness to pay model is based on an initial 63% of users of the Suir Blueway Tipperary in the town in year one being from the immediate community. This figure reflects average community usage figures from the Western and Waterford Greenways. As awareness and popularity of the amenity increases in subsequent years, SROI modelling undertaken allows for community usage to grow at a lower rate than visitors to the area.

**Table 4.3.1 – Social Impact - Community Usage of Suir Blueway Tipperary**

	Years 1-5	Years 6-10	Years 11-15	Years 16-20	Years 21-25	Years 1-25
Visitor Numbers	560,629	741,408	891,854	1,003,598	1,108,053	4,305,542
Projected Community Use						-
Annual Usage	313,350	370,704	445,927	501,799	554,027	2,185,807
Adults	250,680	296,563	356,742	401,439	443,221	1,748,645
Youths	112,126	148,282	178,371	200,720	221,611	861,108
WTP Valuation - Adults	€1,972,850	€2,333,954	€2,807,557	€3,159,326	€3,488,151	€13,761,838
WTP Valuation - Children	€349,832	€462,639	€556,517	€626,245	€691,425	€2,686,658
Cumulative Total	€2,322,683	€2,796,592	€3,364,074	€3,785,571	€4,179,576	€16,448,497
NPV Years	€2,063,532	€2,038,773	€2,018,000	€1,868,636	€1,695,739	€9,685,481

The model examines usage based on adults and children and applies an hourly willingness to pay value<sup>8</sup> (WTP). In the first five years after completion, the SROI generated amounts to €2.3 million. This is discounted to an NPV of €2.1 million for this five year period.

In the first ten years total SROI will have increased to €5.12 million, discounted to an NPV of €4.10 million. Over the 25 year assessment period the total SROI is projected to be €16.45 million, discounted to an NPV of €9.69 million.

## 2. Reduction in Absenteeism – Increased Productivity

The qualitative and quantitative analysis presented previously highlights the impact of physical activity and sport on social wellbeing. In estimating the impact on productivity, the analysis focuses on Carrick on Suir to illustrate the potential reduction in absenteeism and value to community health.

**Table 4.3.2 – Absenteeism inputs**

<b>Assessing the Productivity impact</b>	
Average days lost per Employee per annum <sup>9</sup>	9.2 days
Average Cost per Employee per annum <sup>10</sup>	€1,647
Carrick on Suir – Population at Work (Census 2016)	1,979
Participation in sport and physical activity <sup>11</sup>	46%
Reduction in Absenteeism through sustained sports participation <sup>12</sup>	25%
Average days lost per employee not involved in sports	10.35
Average days lost per employee not involved in sports	7.85

The average number of days lost per employee in the public sector is estimated to be 9.2 days. Employees who engage in regular sport and physical activity are absent 25% less days than their co-workers who do not exercise on a consistent basis. Employees involved in sport and physical activity lose an average of 7.85 days and become effectively more productive for their employers.

**Table 4.3.3 – Estimated current levels of absenteeism in Carrick on Suir**

<sup>8</sup> Adult and children hourly WTP values are based on authors' primary research conducted for Munster GAA, Clare Sports Partnership and Social Return on Analysis conducted on Operation Transformation Programmes organised by Local Sports Partnerships.

<sup>9</sup> Public Sector absence rates 2018

<sup>10</sup> Average hourly earnings 2019 (CSO)

<sup>11</sup> Irish Sports Monitor 2019

<sup>12</sup> Effects of Sports Participation on Absenteeism on the Working Population' (Van den Heuvel, Boshuizen, Hildebrandt, et al, 2005)

	Population	Average number of days lost per year	Total Days Absenteeism	Estimated <sup>13</sup> cost per day	Total Cost
<b>Carrick on Suir Working Population</b>	1,979				
<b>Non-Participation in Sport</b>	1,069	10.35	11,061	€179.10	€1,980,959
<b>Participation in Sport</b>	910	7.85	7,146	€179.10	€1,279,879
		Total Day Overall average per person	18,207 9.20		€3,260,838

In order to assess the impact on local productivity, the number of the working population engaged in regular sport and physical activity is estimated. Based on the Sport Ireland National Sport Monitor distribution of active versus non active, the annual cost of absenteeism is in excess of €3.2 million per annum locally.

**Table 4.3.4 – Potential Absenteeism Benefits**

	Population	Average number of days lost per year	Total Days Absenteeism	Estimated cost per day	Total Cost
<b>Carrick on Suir Working Population</b>	1,979				
<b>Non-Participation in Sport</b>	963	10.35	9,967	€179.10	€1,785,099
<b>Participation in Sport</b>	1,016	7.85	7,976	€179.10	€1,428,430
		Total Day Overall Av.	17,943 9.07		€3,213,529
		<b>Projected Annual Productivity Value</b>			<b>€47,309</b>

Based on the ability to increase participation in sport and physical activity among those not currently active, the annual productivity saving will be €47,309 or 264 employee days per year. This is based on a conversion of 10% of the current non-active members of the working population to become more engaged in physical activity, stimulated through local community usage of the Suir Blueway Tipperary. The overall average days lost drops from 9.20 to 9.07 days based on this conversion rate.

<sup>13</sup> Derived from average hourly earnings 2019 (CSO)

# SECTION FIVE

Transformational Potential



## 5.1 TRANSFORMATIONAL POTENTIAL

The post Covid-19 tourism environment has presented destinations such as Carrick on Suir with considerable opportunities to capitalise on. The recent investments in the Suir Blueway Tipperary and Ormond Castle has provided tourism assets designed to benefit the growing demand for outdoor recreation activities and new heritage visitor experiences. The opportunity to further integrate the Blueway with the Ormond Castle Quarter and create new ways to access and interpret the local heritage story is a significant opportunity. It will also create a new emphasis on the town as an accessible outdoor activity hub and grow usage of existing facilities such as the 40 berth marina as the launch pad for onsite activities such as fishing, kayaking and boating.

The investment in the Suir Blueway Tipperary and the recent product development investment at Ormond Castle has created the local conditions to develop a range of new visitor experiences told in a differentiated way through heritage, culture and activities. This product investment must be matched by the infrastructure that enhances the visitor experience. Equally, the ability to maximise the long term economic impact must ensure future investment contributes to increasing visitor dwell time and visitor orientation across the town. The proposed Regeneration Plan will connect 'place' through public realm investment and the enhancement of the town as a visitor destination. Developing distinctive destinations must ensure it combines a mix of a strong product base with the supporting conditions that contribute to creating positive visitor experiences. This requires the appropriate public realm investment and amenity infrastructure to encourage sustained amenity usage by the community and visitors alike.

Destinations with national and international appeal also represent great places to live. Developing the amenity value of the Suir Blueway Tipperary, for example, uplifting the value and service of Sean Healy Park dedicated space for watersports, washing facilities for watercraft, easy access to the Main Street etc will be a significant contributor to achieving broader socio-economic goal for the town and hinterland. National return on investment analysis of investment in greenways, Blueway's and trails provides evidence of the impact of such strategic investment. The proposed Regeneration Plan investment represents the catalyst investment that can accelerate the impact of the Suir Blueway Tipperary for Carrick on Suir, and the extended route to Cahir. Such investment represents the enabling conditions that propel the success of activity products such as Blueway's.

The investment provides the private sector with the confidence to invest in creating the ancillary services required to develop the local visitor economy. It supports the town becoming a year round destination and extend the visitor season that will create an uplift to local attractions such as Ormond Castle and the local heritage centre. Initial private sector confidence in the potential impact of recent investments is evident through the planned development of a new 40 bed hotel in the town (recently secured planning permission). Additional private sector expansion includes the expansion of a local bike hire company to accommodate increased demand from the Blueway, while two new coffee docks opened on the Blueway at Carrick on Suir in summer 2021; 'The Lazy Cow' located opposite Sean Healy Park and the 'Blueway Café' located at the Deerpark access point 1km west of Sean Healy Park.

The enhancement of the town experience will represent an important component of the wider regional tourism development opportunity to attract and retain visitors in Tipperary. At a wider regional level, the development of the trailheads and visitor service will play an important role in future consideration of linking the Carrick on Suir to the Waterford Greenway. This has the capacity to be transformational for Carrick on Suir in addition to the Suir Blueway Tipperary itself resulting in a wider distribution of socio-economic benefits to the area.

The transformational potential of the Regeneration Plan investment is summarised as follows;

- Position Carrick on Suir as an iconic Blueway Trail Head differentiated by the quality of the public realm, visitor infrastructure and linking activities with the heritage and culture tourism products of the town.
- Provide an economic stimulus for the local economy as the catalysts to grow trails usage and visitor numbers to local heritage sites.
- Investment in the conditions to develop the opportunity to link Suir Blueway Tipperary with the Waterford Greenway and the creation of an international standard trails experience blending land and water experiences.
- Development of Carrick on Suir as a tourism destination as a part of a growing regional tourism cluster of products linking Cashel, Clonmel, Cahir, Fethard, Waterford and Kilkenny.
- Investment to maximise the product investment in Ormond Castle and increased visitor dwell time on the town.
- Creation of the local conditions that provide the private sector with the confidence to invest in new tourism enterprises.
- Achieve a growth in visitor footfall across the town through the enhancement of the place linked to the regeneration investment in the town and to the Blueway trailheads.
- Development of a year round tourism product through the growth of the Suir Blueway Tipperary and increased usage of existing resources such as the marina.
- Maximise regional linkages to Carrick on Suir through the Butler Trail by enhancing the town as a place to visit.
- A catalyst for sustainable tourism and travel linked to the rail and ferry access to / from regional greenways and blueways enabling sustainable connectivity for both domestic and international visitors to the southern region.
- Contributor to climate action goals promoting slow adventure exploration of the region linking Suir Blueway Tipperary to the Waterford Greenway.
- Build on the national success of trails, greenway and blueways to develop the town as a nationally significant trailhead experience.
- Contribute to the growth of annual domestic and international visitor numbers staying the region.
- Develop visitor numbers that prompt future investment in growing the volume of local bedstock and range of accommodation options for visitors.
- Contribution to healthy community and healthy working population.
- Sustainable tourism exemplar for sustainable tourism highlighting the Tipperary destination approach to Responsible Tourism aligned with the Visitor, Industry, Community and Environment (VICE) sustainable tourism model.



## 5.2 SOCIAL AND ECONOMIC IMPACTS, EVALUATION AND INNOVATION

### SOCIAL AND ECONOMIC IMPACT

Visitor numbers following investment in the Regeneration Plan are projected to be 560,629 over the initial five year period. 77,000 bednights will be generated locally in the first five years following plan investment completion and enhancement of amenities proposed. Based on the direct and indirect impacts of all visitor expenditure (overnight and daytime visitors) there is a projected total exchequer return of €6.57 million (NPV) in the first five years, of which €3.13 million (NPV) relates to direct expenditure. The total direct GVA of economic activity over years one to five is €16.49 million (NPV).

Over an assessment period of 25 years, the total exchequer returns impact amounts to €48.94 million (NPV) with €21.61 million (NPV) attributable to direct expenditure by visitors to the area. The cumulative total GVA impact of economic activity over the same period is €113.80 million (NPV).

The value of overseas tourists to the wider area will increase to more than €1.57 million (NPV) over the initial five years.

Day visitors will be an important element of the local tourism economy. There are projected to be approximately 170,000 day visitors to the local area over the initial five years after completion of the project, generating a total of €3.75 million (NPV) in expenditure in the local economy. In the following five year period, between years 6-10, there are projected to be more than 244,000 day visitors spending more than €5.23 million (NPV) in the destination. Over the initial 25 years after completion, there will be a projected 1.48 million day visitors to the local area generating more than €27.11 million (NPV) in expenditure.

Total direct expenditure by visitors to the area (combined overnight and day trip visitors) in year one is €1.54 million (NPV) increasing to €2.34 million (NPV) in year five. Cumulative direct expenditure over the initial five year period is €9.84 million (NPV), rising to €13.24 million (NPV) in the period from years six to ten. Over 25 years there is a total direct expenditure of €67.95 million (NPV) by visitors to the area.

This level of expenditure is projected to support 19 direct jobs in year one, rising to 34 Full Time Equivalents (FTEs) by year five. When the multiplier impacts are accounted for this has a total employment impact of 40 in year one, rising to 71 in year five. By year ten expenditure is projected to support 48 direct FTEs with a total employment impact of 99. It is projected that in year 25 the expenditure by visitors will support 91 FTEs with a total employment impact of 189.

## EVALUATION

A measurement system and performance barometer will be to assess the impact of the investment in tourism based on the Regeneration Plan and its contribution to the wider Tipperary tourism development objectives. Indicative measures based on measuring demand, supply and destination competitiveness will include;

### Demand

1. Increased levels of usage by international, domestic and local community.
2. Increased levels of dwell time in the area measured by an increase in occupancy among local accommodation providers.
3. Increasing annual user satisfaction of the Suir Blueway Tipperary
4. Increase in visitor spend in the local area based on day visitors and overnight guests.

### Supply

1. Increase in number of new tourism enterprises aligned with the Suir Blueway Tipperary.
2. Increase employment levels in existing and tourism enterprises.
3. Increase in bed stock availability across the destination.
4. Increase in new local visitor experiences development based on saleable experiences to visitors to the area as a result of the Suir Blueway Tipperary.
5. Increase in the volume of tourism industry training provision and participation levels.
6. Expansion of operational periods for tourism businesses to extend operations beyond peak tourism season.

### Destination

1. Increase in the number of events linked to the Suir Blueway Tipperary and number of attendees.
2. Increase in the number of tourism enterprises with bookable experiences across the Blueway and surrounding areas for visitors to pre-plan their visit.
3. Increase in the level of tourism marketing activity stimulated by the Suir Blueway Tipperary and level of content generated by social media channels.

## INNOVATION

The Regeneration Plan is an innovative approach to place making that links a series of visitor experiences. This integration of experiences and sites reflects increasingly popular trends in how visitors engage with heritage attractions and activities. The opportunity for visitors to experience the Suir Blueway Tipperary linked to the town centre and Ormond Castle Quarter introduces new ways of the telling the Ireland's Ancient East story and strongly differentiate the Carrick on Suir segment of the Suir Blueway Tipperary. By linking to Cahir and Clonmel through this expanded experience base, the appeal of the Suir Blueway Tipperary has the capacity to grow significantly. It will encourage year round usage and enable Carrick on Suir develop the opportunity as an iconic and distinct Trail Head with the corresponding infrastructure and services. Future expansion linking the town with the Waterford Greenway will accelerate the scale of innovation for trails, linking water and land activities with water-based opportunities. The potential innovation outputs include;

- Tourism development – a focal point for destination development linked to other hubs within the regional cluster of visitor attractions and products.
- Being active in nature – community and visitor opportunity to engage in land and water-based activities through attractive trailheads and access points.
- Exploration of waterscapes – maximising the value of the River Suir and local marina for sustainable activity engagement as a year proposition.
- Service providers enabling easy access for all – fostering new levels of local tourism entrepreneurship and local services aligned with the Blueway and the tourism economy.
- Multi-activity trail options – development of new ways to explore Carrick on Suir , town, trails linked to key sites across the town to orientate visitors across the locality and wider region.
- Integrating local culture, heritage, arts and visitor attractions – the linking of the Ormond Castle Quarter and the town centre/Suir Blueway with activity tourism introducing visitors to new stories told through different forms of interpretation.
- Responsible recreation within the environment – a sustainable approach to trails development and visitor engagement with the natural and built environment.
- Community health – maximising the investment in the Blueway to make a long term difference to community levels of physical activity.

### 5.3 SUSTAINABILITY

The sustainability of the project will be realised through Regeneration Plan investment. It is based on achieving a number of regenerative impacts concentrated on economic, social and physical development goals.

At an economic level, the tourism impact of the investment has been demonstrated to be significant with the potential to grow and become a sustainable contributor of the local economy. The investment will support direct and indirect employment linked to the Suir Blueway Tipperary, impact of visitor spend on the town and inspiring new levels of private sector investment in the area. Future economic sustainability will be developed by growing the numbers of businesses linked to the Suir Blueway Tipperary and growing visitor numbers at the various sites across the town. The wider impact will be the enhancement of the town as a place to live and work.

The ability to attract investment into Carrick on Suir will grow through enhancing the wider social and economic fabric of the town. The ambition for a sustainable approach to town development will be ensuring both the economic and social regeneration activity work together to grow the appeal of Carrick on Suir as a place to live, work and visit.

The projected health impacts highlight the social return on investment in addition to growing sustained participation in activity within the local community. The physical outputs of the approach will manifest themselves through the three core infrastructural projects that form the basis of the plan. However, the wider physical impact will be how this investment will activate a number of key sites across the town from the Marina, town centre to maximising the potential of Ormond Castle. The development of the appropriate visitor and community infrastructure will be central to unlocking the potential of each of these areas.

The tourism sustainability approach will be based on the VICE model for sustainable tourism (Visitor, Industry, Community and Environment). It will ensure future development activity is pursued with the visitor in mind ensuring the product base and town experiences meet the needs of target visitor segments. Industry development will be key to maximising the potential of the investment and activating the Blueway to attract domestic and international visitors. Community involvement and participation will always be at the core of project that will be delivered with a priority focus on protecting the environment to ensure locals and visitors can sustainably engage with the Blueway.

### 5.4 ADDITIONALITY

The economic impact assessment is based on a new scale of additionality resulting from investment in the Regeneration Plan. Historically Carrick on Suir has not been recognised a strong tourism destination. The proposed investment will transform the towns capacity to grow day and overnight visits. The assessment projects significant ability in attracting new visitors from both the overseas and domestic markets with an almost 30% increase in users of the Blueway over the first five years following investment with more than 560,000 over this period.

Investment is projected to attract an additional 9,400 bednights in Year 1 rising to almost 15,500 by Year 5. It will sustain 14 additional FTE's in year one rising to 27 by year five. Additional annual employment income will result in an additional annual average of €1.5 million (NPV) in total employment income to the area over the first five years.

Overseas visitor spend is projected to increase to a cumulative €1.58 million (NPV) over the initial five years. Domestic visitor spend is projected to be €8.23 million (NPV) following investment, compared with a do-nothing scenario of €2.13 million (NPV).

The increased scale of additionality that will arise from the investment will include;

- New ways to enhance activity and heritage tourism development.
- Success across all defined economic matrix from visitor growth, seasonality, enterprise development and the local value of tourism i.e. employment income.
- Destination development through industry and community tourism capacity building.
- New levels of local collaboration and emerging tourism networks through a shared tourism vision.
- A coherent approach to visitor number growth and destination competitiveness.

# SECTION SIX

Conclusions



## 6.1 CONCLUSIONS

The tourism impact analysis has demonstrated the capacity of the proposed Regeneration Plan investment to be a significant tourism catalyst for Carrick on Suir and exemplar for sustainable tourism development. The investment will support new linkages between the Suir Blueway Tipperary, the town centre/ Main Street and the historic Ormond Castle Quarter. It will result in the creation of a coherent visitor destination linking each of the core visitor flow zones promoting visitor flow. Users of the Suir Blueway Tipperary and visitors to Ormond Castle will be encouraged to explore the heart of the town and the wider built and natural heritage of Carrick on Suir.

The linking of Sean Healy Park with the Ormond Quarter via the Suir Blueway Tipperary creates the platform for tourism innovation. This includes the growth of the outdoor activity base, trail head innovation, linking activities to Ormond Castle Quarter and new ways of interpreting the local heritage stories. It will support the development of the towns approach to responsible tourism, promoting climate neutral ways of exploring the region.

The immediate impact will be the creation of destination that can cater for a wider variety of market segments from culturally curious to special interest activity visitors. The longer term impact will be the development of a sustainable tourism destination recognised for visitor experience innovation blending activity and community resources with local attractions. The economic tourism dividends will include an increase in direct employment and the creation of local investment conditions that will inspire increased levels of private sector activity and enterprise development.

Regenerative projects focus on economic, social, physical and environmental outputs. Across each assessment criteria within this analysis, the independent analysis demonstrates the long term economic opportunity that exists for tourism as an emerging sector for the area. The investment will transform how visitors will engage with the town and help to eliminate the transient destination association that currently exists i.e. visitors pass through with limited visitor dwell time in the area.

The regional accessibility of the town presents its own opportunities, however, as a destination it requires more reasons for visitors to stop, say longer and explore more. This will be further enhanced through proposed linkages with the Waterford Greenway and regional transport hubs such as ferry ports and rail links across the South East. It will also contribute to the dispersion of visitors across the region and motivate visitors to stay longer in the area. The existence of iconic attractions such as the Rock of Cashel, Cahir Castle, Kilkenny Castle and the Waterford Greenway within close proximity of Carrick on Suir establishes a naturally forming cluster of attractions / activities. The combined impact of this cluster has the scope to generate a significant socio-economic impact for the wider region.

Based on the independent tourism impact analysis of the proposed investment, the following represent the key socio-economic outputs;

- The regeneration plan investment will become an enabling strategy to develop Carrick on Suir as an emerging tourism destination and create new opportunities for sustained growth in annual visitor numbers. It will provide an economic stimulus for a local tourism economy

currently experiencing low levels of economic performance. It will enhance the supply side conditions of the local tourism economy through new enterprise development and encouraging new levels of tourism entrepreneurship within the town.

- It will create an iconic Blueway trailhead and become the catalyst to realising the regional greenway project linking the Suir Blueway Tipperary with the Waterford Greenway. This will lay the foundation for this project that has the scope to be regionally transformative in how visitors engage with Ireland's Ancient East.
- The areas for investment will provide a focal point to accelerate strategic tourism synergies with the extended clusters of tourism towns in Tipperary (e.g. Cashel, Cahir, Clonmel, Fethard and the region (Kilkenny and Waterford). In the absence of such investment, the town will fail to match the destination quality experience provided in other cluster towns.
- It will support the development of a profile of Carrick on Suir as a destination for responsible tourism accessed through sustainable transport means (rail, walking and cycling) and an exemplar for low carbon impact tourism. The investment will provide cyclists, runners, walkers and recreational water sports users with a low carbon impact way to explore Tipperary and support other outdoor activity destinations in the county such as the Munster Vales. The elevated focus on the outdoors will ensure existing town resources such as the marina are maximised and become integral elements of the Carrick on Suir activity cluster.
- The enhancement of the Ormond Quarter and new visitor experiences will grow the capacity of the town to become a key visitor experience in Ireland's Ancient East and maximise the regional opportunity through the Butler Trail links to Ormond Castle and other regional towns. It will also maximise the regional impact of developing Carrick on Suir as part of an extended Limerick-Waterford economic network, contributing to a range of socio-economic impacts/synergies that include visitor dispersion, increased dwell time and seasonality.
- The projected growth in Suir Blueway Tipperary usage among international and domestic visitors will simultaneously see an increase in community usage. This will realise long term health impacts for the local community. It will ensure the community investment in bringing the Suir Blueway Tipperary to fruition will generate long term socio-economic return on investment. Equally it will result in a short payback period for the public investment in the project.

The analysis clearly demonstrates the socio-economic impact for Carrick on Suir in the immediate term. Over a longer timeframe, the investment will become a catalyst for sustained economic impact across the wider tourism economy of the cluster of Cahir, Clonmel, Cashel, Fethard and Carrick on Suir. On a regional level, the investment will contribute to the strategic objectives of retaining visitors longer within the Tipperary, Kilkenny and Waterford/Limerick tourism axis.

In the initial five years, post investment in the Regeneration Plan, the tourism economic impact is projected to be €20.7 million (NPV). It will generate an additional 77,000 bednights for the town and generate direct visitor expenditure of €9.8 million (NPV). Annual visitor numbers to the town are



expected to grow from 94,000 in year one to 128,000 by year five. By year 25, the total visitor numbers are projected to be 230,000. This includes 34,500 international visitors and 81,000 domestic visitors.

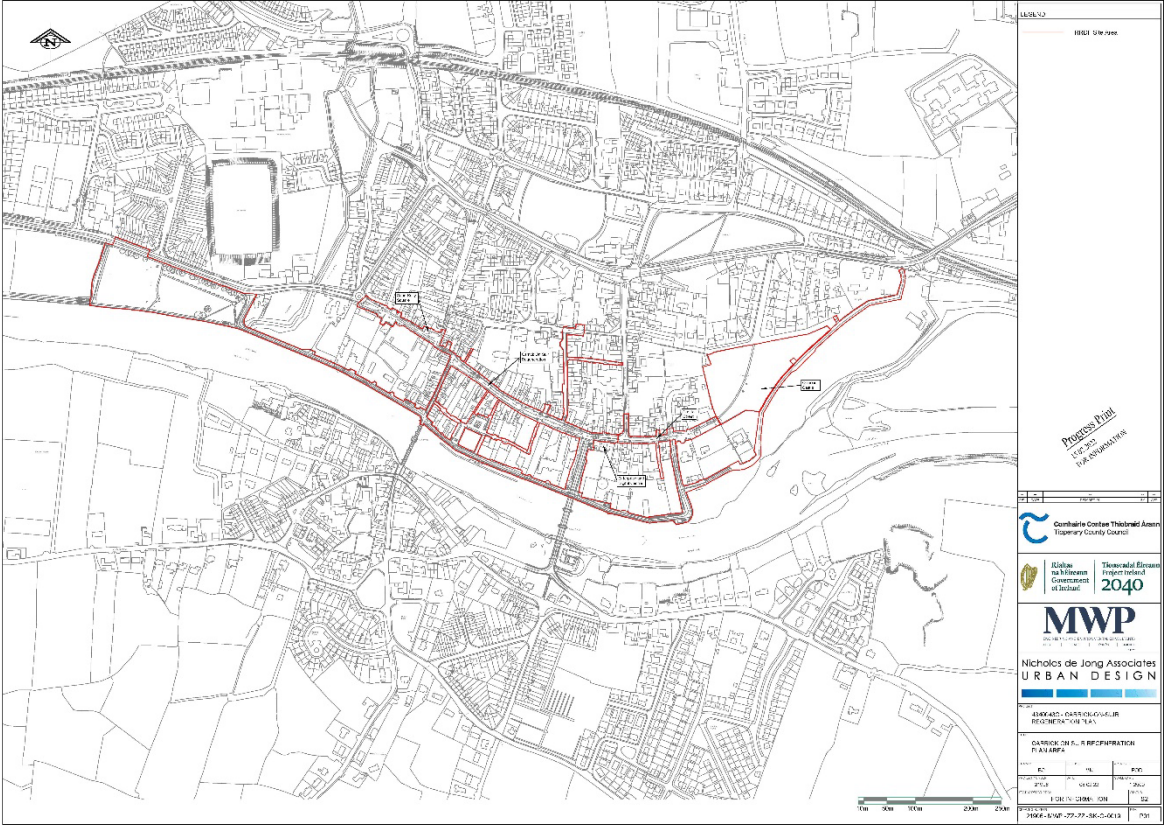
Over the extended period of analysis, the value of tourism will increase significantly. It is evident it will attract more international and domestic visitors to the town as a result of the investment and a new capacity to grow visitor numbers at Ormond Castle investment and increase usage of the Suir Blueway Tipperary. The assumptions within this assessment model are based on the public realm investment taking place as outlined to create the local trail head conditions that will prove motivational for international and domestic visitors. In order to achieve the visitor number scenarios presented, investment in trail head quality and visitor experience innovation will be a prerequisite.

# APPENDIX ONE

Regeneration Plan – Site Elements



Appendix 1 – Regeneration Plan Area



# APPENDIX TWO

15 Year Impact Assessments



**Investment Scenario**  
**25 Year assessment of tourism to the area**

**Table 1: Economic Impact of Promotable<sup>15</sup> Overnight Visitors**

	Year 1	Year 2	Year 3	Year 4	Year 5
Total Visitor Numbers	94,000	103,400	113,740	121,702	127,787
FIT	37,600	41,360	45,496	48,681	51,115
Groups	28,200	31,020	34,122	36,511	38,336
Special Interest Groups	18,800	20,680	22,748	24,340	25,557
Student / OAP	4,700	5,170	5,687	6,085	6,389
Schools	4,700	5,170	5,687	6,085	6,389
<b>Projected Promotable Overnights</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
FIT	4,700	6,204	6,824	7,302	8,945
Groups	3,760	4,136	5,687	6,085	6,389
Special Interest Groups	1,880	2,068	2,275	2,434	2,556
Student / OAP	940	1,034	1,137	1,217	1,278
Total Bednights	11,280	13,442	15,924	17,038	19,168
<b>Projected O/N Expenditure (NPV)</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
Overnight Visitors	€976,154	€1,118,510	€1,274,042	€1,310,793	€1,417,925
Overseas Visitors	€48,808	€111,851	€191,106	€262,159	€354,481
Domestic Visitors	€927,346	€1,006,659	€1,082,936	€1,048,635	€1,063,444

	Year 6	Year 7	Year 8	Year 9	Year 10
Total Visitor Numbers	134,176	140,885	147,929	155,326	163,092
FIT	53,670	56,354	59,172	62,130	65,237
Groups	40,253	42,266	44,379	46,598	48,928
Special Interest Groups	26,835	28,177	29,586	31,065	32,618
Student / OAP	6,709	7,044	7,396	7,766	8,155
Schools	6,709	7,044	7,396	7,766	8,155
<b>Projected Promotable Overnights</b>	<b>Year 6</b>	<b>Year 7</b>	<b>Year 8</b>	<b>Year 9</b>	<b>Year 10</b>
FIT	9,392	9,862	10,355	10,873	11,416
Groups	6,709	7,044	7,396	7,766	8,155
Special Interest Groups	2,684	2,818	2,959	3,107	3,262
Student / OAP	1,342	1,409	1,479	1,553	1,631
Total Bednights	20,126	21,133	22,189	23,299	24,464
<b>Projected O/N Expenditure (NPV)</b>	<b>Year 6</b>	<b>Year 7</b>	<b>Year 8</b>	<b>Year 9</b>	<b>Year 10</b>
Overnight Visitors	€1,558,809	€1,573,798	€1,588,930	€1,604,208	€1,619,633
Overseas Visitors	€467,643	€472,139	€476,679	€481,263	€485,890
Domestic Visitors	€1,091,166	€1,101,658	€1,112,251	€1,122,946	€1,133,743

<sup>15</sup> Promotable Visitors are defined as domestic and international tourists attracted to Carrick on Suir to consume one or many tourism experiences including local attractions, amenities or ancillary services. Subsequent commentary provides separate analysis of the promotable visitor economic impact. For the purposes of the tourism impact analysis, no economic value is associated with community usage of the local amenities. Economic impact analysis and commentary is specific only to 'promotable' tourism activity in the area i.e. domestic and international visitors not residing in the area.

	Year 11	Year 12	Year 13	Year 14	Year 15
Visitor Numbers	167,985	173,024	178,215	183,562	189,068
FIT	67,194	69,210	71,286	73,425	75,627
Groups	50,395	51,907	53,465	55,068	56,721
Special Interest Groups	33,597	34,605	35,643	36,712	37,814
Student / OAP	8,399	8,651	8,911	9,178	9,453
Schools	8,399	8,651	8,911	9,178	9,453
<b>Projected Overnights</b>	<b>Year 11</b>	<b>Year 12</b>	<b>Year 13</b>	<b>Year 14</b>	<b>Year 15</b>
FIT	11,759	12,112	12,475	12,849	13,235
Groups	8,399	8,651	8,911	9,178	9,453
Special Interest Groups	3,360	3,460	3,564	3,671	3,781
Student / OAP	1,680	1,730	1,782	1,836	1,891
Total Bednights	25,198	25,954	26,732	27,534	28,360
<b>Projected O/N Expenditure (NPV)</b>	<b>Year 11</b>	<b>Year 12</b>	<b>Year 13</b>	<b>Year 14</b>	<b>Year 15</b>
Overnight Visitors	€1,800,476	€1,783,163	€1,766,018	€1,749,037	€1,732,219
Overseas Visitors	€540,143	€534,949	€529,805	€524,711	€519,666
Domestic Visitors	€1,260,333	€1,248,214	€1,236,212	€1,224,326	€1,212,553

	Year 16	Year 17	Year 18	Year 19	Year 20
Visitor Numbers	192,850	196,707	200,641	204,654	208,747
FIT	77,140	78,683	80,256	81,861	83,499
Groups	57,855	59,012	60,192	61,396	62,624
Special Interest Groups	38,570	39,341	40,128	40,931	41,749
Student / OAP	9,642	9,835	10,032	10,233	10,437
Schools	9,642	9,835	10,032	10,233	10,437
<b>Projected Overnights</b>	<b>Year 16</b>	<b>Year 17</b>	<b>Year 18</b>	<b>Year 19</b>	<b>Year 20</b>
FIT	13,499	13,769	14,045	14,326	14,612
Groups	9,642	9,835	10,032	10,233	10,437
Special Interest Groups	3,857	3,934	4,013	4,093	4,175
Student / OAP	1,928	1,967	2,006	2,047	2,087
Total Bednights	28,927	29,506	30,096	30,698	31,312
<b>Projected O/N Expenditure (NPV)</b>	<b>Year 16</b>	<b>Year 17</b>	<b>Year 18</b>	<b>Year 19</b>	<b>Year 20</b>
Overnight Visitors	€1,868,798	€1,832,859	€1,797,612	€1,763,043	€1,729,138
Overseas Visitors	€560,639	€549,858	€539,284	€528,913	€518,741
Domestic Visitors	€1,308,158	€1,283,002	€1,258,328	€1,234,130	€1,210,397

	Year 21	Year 22	Year 23	Year 24	Year 25
Visitor Numbers	212,922	217,180	221,524	225,954	230,473
FIT	85,169	86,872	88,609	90,382	92,189
Groups	63,877	65,154	66,457	67,786	69,142
Special Interest Groups	42,584	43,436	44,305	45,191	46,095
Student / OAP	10,646	10,859	11,076	11,298	11,524
Schools	10,646	10,859	11,076	11,298	11,524
<b>Projected Overnights</b>	<b>Year 21</b>	<b>Year 22</b>	<b>Year 23</b>	<b>Year 24</b>	<b>Year 25</b>
FIT	14,905	15,203	15,507	15,817	16,133
Groups	10,646	10,859	11,076	11,298	11,524
Special Interest Groups	4,258	4,344	4,430	4,519	4,609
Student / OAP	2,129	2,172	2,215	2,260	2,305
Total Bednights	31,938	32,577	33,229	33,893	34,571
<b>Projected O/N Expenditure (NPV)</b>	<b>Year 21</b>	<b>Year 22</b>	<b>Year 23</b>	<b>Year 24</b>	<b>Year 25</b>
Overnight Visitors	€1,864,072	€1,828,225	€1,793,066	€1,758,584	€1,724,765
Overseas Visitors	€559,222	€548,467	€537,920	€527,575	€517,430
Domestic Visitors	€1,304,851	€1,279,757	€1,255,147	€1,231,009	€1,207,336

**Table 2: Economic Impact of Promotable<sup>16</sup> Day Visitors**

	Year 1	Year 2	Year 3	Year 4	Year 5
FIT	9,400	11,374	13,649	17,038	19,168
Groups	6,580	8,272	10,237	12,170	14,057
Special Interest	4,700	5,170	5,687	6,085	6,389
Student / OAP	2,820	3,102	4,550	4,868	5,111
Total Day Visits	23,500	27,918	34,122	40,162	44,725
Projected Day Visit Expenditure (NPV)	Year 1	Year 2	Year 3	Year 4	Year 5
Day Visitors	€564,904	€645,294	€758,358	€858,257	€919,026
Overseas Visitors	€28,245	€64,529	€113,754	€171,651	€229,756
Domestic Visitors	€536,659	€580,765	€644,605	€686,606	€689,269
Total Expenditure	€564,904	€645,294	€758,358	€858,257	€919,026
Total Overseas Exp	€77,053	€176,380	€304,860	€433,810	€584,238
Total Domestic Exp	€1,464,005	€1,587,423	€1,727,540	€1,735,241	€1,752,713

	Year 6	Year 7	Year 8	Year 9	Year 10
FIT	20,126	21,133	22,189	23,299	24,464
Groups	14,759	15,497	16,272	17,086	17,940
Special Interest	6,709	7,044	7,396	7,766	8,155
Student / OAP	5,367	5,635	5,917	6,213	6,524
Total Day Visits	46,962	49,310	51,775	54,364	57,082
Projected Day Visit Expenditure (NPV)	Year 6	Year 7	Year 8	Year 9	Year 10
Day Visitors	€1,039,206	€1,049,198	€1,059,287	€1,069,472	€1,079,756
Overseas Visitors	€311,762	€314,760	€317,786	€320,842	€323,927
Domestic Visitors	€727,444	€734,439	€741,501	€748,631	€755,829
Total Expenditure	€2,598,015	€2,622,996	€2,648,217	€2,673,681	€2,699,389
Total Overseas Exp	€779,404	€786,899	€794,465	€802,104	€809,817
Total Domestic Exp	€1,818,610	€1,836,097	€1,853,752	€1,871,576	€1,889,572

<sup>16</sup> Promotable Visitors are defined as domestic and international tourists attracted to Carrick on Suir to consume one or many tourism experiences including local attractions, amenities or ancillary services. Subsequent commentary provides separate analysis of the promotable visitor economic impact. For the purposes of the tourism impact analysis, no economic value is associated with community usage of the local amenities. Economic impact analysis and commentary is specific only to 'promotable' tourism activity in the area i.e. domestic and international visitors not residing in the area.



	Year 11	Year 12	Year 13	Year 14	Year 15
FIT	25,198	25,954	26,732	27,534	28,360
Groups	18,478	19,033	19,604	20,192	20,798
Special Interest	8,399	8,651	8,911	9,178	9,453
Student / OAP	6,719	6,921	7,129	7,342	7,563
Total Day Visits	58,795	60,559	62,375	64,247	66,174
<b>Projected Day Visit Expenditure (NPV)</b>	<b>Year 11</b>	<b>Year 12</b>	<b>Year 13</b>	<b>Year 14</b>	<b>Year 15</b>
Day Visitors	€1,260,333	€1,248,214	€1,236,212	€1,224,326	€1,212,553
Overseas Visitors	€378,100	€374,464	€370,864	€367,298	€363,766
Domestic Visitors	€882,233	€873,750	€865,349	€857,028	€848,787
Total Expenditure	€3,060,808	€3,031,378	€3,002,230	€2,973,362	€2,944,772
Total Overseas Exp	€918,243	€909,413	€900,669	€892,009	€883,432
Total Domestic Exp	€2,142,566	€2,121,964	€2,101,561	€2,081,354	€2,061,340

	Year 16	Year 17	Year 18	Year 19	Year 20
FIT	28,927	29,506	30,096	30,698	31,312
Groups	21,213	21,638	22,070	22,512	22,962
Special Interest	9,642	9,835	10,032	10,233	10,437
Student / OAP	7,714	7,868	8,026	8,186	8,350
Total Day Visits	67,497	68,847	70,224	71,629	73,061
<b>Projected Day Visit Expenditure (NPV)</b>	<b>Year 16</b>	<b>Year 17</b>	<b>Year 18</b>	<b>Year 19</b>	<b>Year 20</b>
Day Visitors	€1,261,310	€1,237,054	€1,213,264	€1,189,932	€1,167,049
Overseas Visitors	€378,393	€371,116	€363,979	€356,980	€350,115
Domestic Visitors	€882,917	€865,938	€849,285	€832,953	€816,934
Total Expenditure	€3,130,107	€3,069,913	€3,010,876	€2,952,975	€2,896,187
Total Overseas Exp	€939,032	€920,974	€903,263	€885,892	€868,856
Total Domestic Exp	€2,191,075	€2,148,939	€2,107,613	€2,067,082	€2,027,331

	Year 21	Year 22	Year 23	Year 24	Year 25
FIT	31,938	32,577	33,229	33,893	34,571
Groups	23,421	23,890	24,368	24,855	25,352
Special Interest	10,646	10,859	11,076	11,298	11,524
Student / OAP	8,517	8,687	8,861	9,038	9,219
Total Day Visits	74,523	76,013	77,533	79,084	80,666
<b>Projected Day Visit Expenditure (NPV)</b>	<b>Year 21</b>	<b>Year 22</b>	<b>Year 23</b>	<b>Year 24</b>	<b>Year 25</b>
Day Visitors	€1,210,012	€1,186,742	€1,163,920	€1,141,537	€1,119,585
Overseas Visitors	€363,004	€356,023	€349,176	€342,461	€335,875
Domestic Visitors	€847,008	€830,720	€814,744	€799,076	€783,709
Total Expenditure	€3,074,084	€3,014,967	€2,956,987	€2,900,122	€2,844,350
Total Overseas Exp	€922,225	€904,490	€887,096	€870,037	€853,305
Total Domestic Exp	€2,151,859	€2,110,477	€2,069,891	€2,030,085	€1,991,045

**Table 3: Employment Impact and Employment Income Impact**

	Year 1	Year 2	Year 3	Year 4	Year 5
Tourism Employment Direct	19	23	27	30	34
Employment Indirect	13	15	18	20	22
Employment Induced	8	10	12	13	14
Employment Impact	40	47	57	63	71
Total Projected Direct Employment Income (NPV)	€744,941	€852,616	€982,454	€1,048,510	€1,129,673
Total Projected Indirect Employment Income (NPV)	€487,191	€557,611	€642,525	€685,726	€738,806
Total Projected Induced Employment Income (NPV)	€312,875	€358,099	€412,631	€440,374	€474,463
Total Employment Impact (NPV)	€1,545,008	€1,768,325	€2,037,610	€2,174,611	€2,342,941

	Year 6	Year 7	Year 8	Year 9	Year 10
Tourism Employment Direct	39	41	43	46	48
Employment Indirect	26	27	28	30	31
Employment Induced	17	17	18	19	20
Employment Impact	82	86	90	95	99
Total Projected Direct Employment Income (NPV)	€1,255,870	€1,267,946	€1,280,138	€1,292,447	€1,304,874
Total Projected Indirect Employment Income (NPV)	€821,339	€829,236	€837,210	€845,260	€853,388
Total Projected Induced Employment Income (NPV)	€527,465	€532,537	€537,658	€542,828	€548,047
Total Employment Impact (NPV)	€2,604,674	€2,629,719	€2,655,005	€2,680,534	€2,706,308

	Year 11	Year 12	Year 13	Year 14	Year 15
Tourism Employment Direct	57	58	60	62	64
Employment Indirect	37	38	39	40	42
Employment Induced	24	24	25	26	27
Employment Impact	117	121	124	128	132
Total Projected Direct Employment Income (NPV)	€1,479,583	€1,465,356	€1,451,266	€1,437,311	€1,423,491
Total Projected Indirect Employment Income (NPV)	€967,647	€958,343	€949,128	€940,002	€930,963
Total Projected Induced Employment Income (NPV)	€621,425	€615,449	€609,532	€603,671	€597,866
Total Employment Impact (NPV)	€3,068,654	€3,039,148	€3,009,925	€2,980,984	€2,952,320

	Year 16	Year 17	Year 18	Year 19	Year 20
Tourism Employment Direct	70	72	73	75	76
Employment Indirect	46	47	48	49	50
Employment Induced	30	30	31	31	32
Employment Impact	146	149	152	155	158
Total Projected Direct Employment Income (NPV)	€1,513,081	€1,483,984	€1,455,446	€1,427,456	€1,400,005
Total Projected Indirect Employment Income (NPV)	€989,555	€970,525	€951,861	€933,556	€915,603
Total Projected Induced Employment Income (NPV)	€635,494	€623,273	€611,287	€599,532	€588,002
Total Employment Impact (NPV)	€3,138,131	€3,077,782	€3,018,594	€2,960,544	€2,903,611

	Year 21	Year 22	Year 23	Year 24	Year 25
Tourism Employment Direct	84	86	87	89	91
Employment Indirect	55	56	57	58	60
Employment Induced	35	36	37	37	38
Employment Impact	174	178	181	185	189
Total Projected Direct Employment Income (NPV)	€1,486,000	€1,457,423	€1,429,396	€1,401,907	€1,374,947
Total Projected Indirect Employment Income (NPV)	€971,844	€953,155	€934,825	€916,847	€899,216
Total Projected Induced Employment Income (NPV)	€624,120	€612,118	€600,346	€588,801	€577,478
Total Employment Impact (NPV)	€3,081,964	€3,022,695	€2,964,566	€2,907,556	€2,851,641

	Year 1	Year 2	Year 3	Year 4	Year 5
<b>Economic Impact (NPV)</b>					
Direct Expenditure	€1,541,058	€1,763,804	€2,032,400	€2,169,051	€2,336,951
Indirect Expenditure	€1,001,688	€1,146,472	€1,321,060	€1,409,883	€1,519,018
Induced Expenditure	€693,476	€793,712	€914,580	€976,073	€1,051,628
Total Expenditure Impact	€3,236,221	€3,703,988	€4,268,041	€4,555,006	€4,907,597
<b>Exchequer Impact (NPV)</b>					
Exchequer Returns (Direct)	€490,056	€560,890	€646,303	€689,758	€743,150
Exchequer Returns	€1,029,118	€1,177,868	€1,357,237	€1,448,492	€1,560,616

	Year 6	Year 7	Year 8	Year 9	Year 10
<b>Economic Impact (NPV)</b>					
Direct Expenditure	€2,598,015	€2,622,996	€2,648,217	€2,673,681	€2,699,389
Indirect Expenditure	€1,688,710	€1,704,947	€1,721,341	€1,737,892	€1,754,603
Induced Expenditure	€1,169,107	€1,180,348	€1,191,698	€1,203,156	€1,214,725
Total Expenditure Impact	€5,455,831	€5,508,291	€5,561,256	€5,614,729	€5,668,717
<b>Exchequer Impact (NPV)</b>					
Exchequer Returns (Direct)	€826,169	€834,113	€842,133	€850,230	€858,406
Exchequer Returns	€1,734,954	€1,751,637	€1,768,479	€1,785,484	€1,802,652

	Year 11	Year 12	Year 13	Year 14	Year 15
<b>Economic Impact (NPV)</b>					
Direct Expenditure	€3,060,808	€3,031,378	€3,002,230	€2,973,362	€2,944,772
Indirect Expenditure	€1,989,526	€1,970,395	€1,951,449	€1,932,685	€1,914,102
Induced Expenditure	€1,377,364	€1,364,120	€1,351,003	€1,338,013	€1,325,147
Total Expenditure Impact	€6,427,698	€6,365,893	€6,304,682	€6,244,061	€6,184,021
<b>Exchequer Impact (NPV)</b>					
Exchequer Returns (Direct)	€973,337	€963,978	€954,709	€945,529	€936,438
Exchequer Returns	€2,044,008	€2,024,354	€2,004,889	€1,985,611	€1,966,519

	Year 16	Year 17	Year 18	Year 19	Year 20
<b>Economic Impact (NPV)</b>	€3,130,107	€3,069,913	€3,010,876	€2,952,975	€2,896,187
Direct Expenditure	€2,034,570	€1,995,443	€1,957,070	€1,919,434	€1,882,521
Indirect Expenditure	€1,408,548	€1,381,461	€1,354,894	€1,328,839	€1,303,284
Induced Expenditure	€6,573,226	€6,446,817	€6,322,840	€6,201,247	€6,081,992
Total Expenditure Impact	€3,130,107	€3,069,913	€3,010,876	€2,952,975	€2,896,187
<b>Exchequer Impact (NPV)</b>					
Exchequer Returns (Direct)	€995,374	€976,232	€957,459	€939,046	€920,987
Exchequer Returns	€2,090,286	€2,050,088	€2,010,663	€1,971,997	€1,934,074

	Year 21	Year 22	Year 23	Year 24	Year 25
<b>Economic Impact (NPV)</b>					
Direct Expenditure	€3,074,084	€3,014,967	€2,956,987	€2,900,122	€2,844,350
Indirect Expenditure	€1,998,155	€1,959,729	€1,922,041	€1,885,079	€1,848,828
Induced Expenditure	€1,383,338	€1,356,735	€1,330,644	€1,305,055	€1,279,958
Total Expenditure Impact	€6,455,576	€6,331,431	€6,209,672	€6,090,256	€5,973,135
<b>Exchequer Impact (NPV)</b>					
Exchequer Returns (Direct)	€977,559	€958,759	€940,322	€922,239	€904,503
Exchequer Returns	€2,052,873	€2,013,395	€1,974,676	€1,936,701	€1,899,457

**Table 4: GVA Impact of Additionality due to Economic Activity (NPV)**

	Year 1	Year 2	Year 3	Year 4	Year 5
GVA (NPV)	€1,266,400	€1,449,447	€1,670,172	€1,782,468	€1,920,444
GVA Indirect	€833,291	€953,736	€1,098,973	€1,172,864	€1,263,652
GVA Induced	€481,232	€550,790	€634,665	€677,338	€729,769
GVA Impact	€2,580,923	€2,953,972	€3,403,811	€3,632,669	€3,913,864

	Year 6	Year 7	Year 8	Year 9	Year 10
GVA (NPV)	€2,134,979	€2,155,508	€2,176,234	€2,197,159	€2,218,286
GVA Indirect	€1,404,816	€1,418,324	€1,431,962	€1,445,731	€1,459,632
GVA Induced	€811,292	€819,093	€826,969	€834,920	€842,949
GVA Impact	€4,351,087	€4,392,925	€4,435,164	€4,477,810	€4,520,866

	Year 11	Year 12	Year 13	Year 14	Year 15
GVA (NPV)	€2,515,290	€2,491,105	€2,467,152	€2,443,429	€2,419,935
GVA Indirect	€1,655,061	€1,639,147	€1,623,386	€1,607,777	€1,592,317
GVA Induced	€955,810	€946,620	€937,518	€928,503	€919,575
GVA Impact	€5,126,162	€5,076,872	€5,028,056	€4,979,709	€4,931,827

	Year 16	Year 17	Year 18	Year 19	Year 20
GVA (NPV)	€2,572,238	€2,522,772	€2,474,257	€2,426,676	€2,380,009
GVA Indirect	€1,692,533	€1,659,984	€1,628,061	€1,596,753	€1,566,046
GVA Induced	€977,451	€958,653	€940,218	€922,137	€904,403
GVA Impact	€5,242,222	€5,141,410	€5,042,537	€4,945,565	€4,850,458

	Year 21	Year 22	Year 23	Year 24	Year 25
GVA (NPV)	€2,526,200	€2,477,619	€2,429,973	€2,383,242	€2,337,411
GVA Indirect	€1,662,239	€1,630,273	€1,598,922	€1,568,173	€1,538,016
GVA Induced	€959,956	€941,495	€923,390	€905,632	€888,216
GVA Impact	€5,148,395	€5,049,388	€4,952,284	€4,857,048	€4,763,643

**Do Nothing Scenario**  
**25 Year assessment of tourism to the area**

**Table 1: Economic Impact of Promotable<sup>17</sup> Overnight Visitors**

	Year 1	Year 2	Year 3	Year 4	Year 5
Total Visitor Numbers	48,410	49,862	51,358	52,899	54,486
FIT					
Groups	19,364	19,945	20,543	21,160	21,794
Special Interest Groups	14,523	14,959	15,407	15,870	16,346
Student / OAP	9,682	9,972	10,272	10,580	10,897
Schools	2,421	2,493	2,568	2,645	2,724
<b>Projected Promotable Overnights</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
FIT	968	997	1,027	1,058	1,090
Groups	484	499	514	529	545
Special Interest Groups	-	-	514	529	545
Student / OAP	484	499	514	529	545
Total Bednights	1,936	1,994	2,568	2,645	2,724
<b>Projected O/N Expenditure (NPV)</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
Overnight Visitors	€167,573	€165,962	€205,458	€203,482	€201,525
Overseas Visitors	€3,351	€3,319	€4,109	€4,070	€4,031
Domestic Visitors	€164,222	€162,643	€201,348	€199,412	€197,495

	Year 6	Year 7	Year 8	Year 9	Year 10
Total Visitor Numbers	55,576	56,687	57,821	58,977	60,157
FIT	22,230	22,675	23,128	23,591	24,063
Groups	16,673	17,006	17,346	17,693	18,047
Special Interest Groups	11,115	11,337	11,564	11,795	12,031
Student / OAP	2,779	2,834	2,891	2,949	3,008
Schools	2,779	2,834	2,891	2,949	3,008
<b>Projected Promotable Overnights</b>	<b>Year 6</b>	<b>Year 7</b>	<b>Year 8</b>	<b>Year 9</b>	<b>Year 10</b>
FIT	1,112	1,134	1,156	1,180	1,203
Groups	556	567	578	590	602
Special Interest Groups	556	567	578	590	602
Student / OAP	556	567	578	590	602
Total Bednights	2,779	2,834	2,891	2,949	3,008
<b>Projected O/N Expenditure (NPV)</b>	<b>Year 6</b>	<b>Year 7</b>	<b>Year 8</b>	<b>Year 9</b>	<b>Year 10</b>
Overnight Visitors	€197,650	€193,849	€190,121	€186,465	€182,879
Overseas Visitors	€3,953	€3,877	€3,802	€3,729	€3,658
Domestic Visitors	€193,697	€189,972	€186,319	€182,736	€179,221

<sup>17</sup> Promotable Visitors are defined as domestic and international tourists attracted to Carrick on Suir to consume one or many tourism experiences including local attractions, amenities or ancillary services. Subsequent commentary provides separate analysis of the promotable visitor economic impact. For the purposes of the tourism impact analysis, no economic value is associated with community usage of the local amenities. Economic impact analysis and commentary is specific only to 'promotable' tourism activity in the area i.e. domestic and international visitors not residing in the area.



	Year 11	Year 12	Year 13	Year 14	Year 15
Visitor Numbers	61,360	62,587	63,839	65,116	66,418
FIT	24,544	25,035	25,536	26,046	26,567
Groups	18,408	18,776	19,152	19,535	19,925
Special Interest Groups	12,272	12,517	12,768	13,023	13,284
Student / OAP	3,068	3,129	3,192	3,256	3,321
Schools	3,068	3,129	3,192	3,256	3,321
<b>Projected Overnights</b>	<b>Year 11</b>	<b>Year 12</b>	<b>Year 13</b>	<b>Year 14</b>	<b>Year 15</b>
FIT	1,227	1,252	1,277	1,302	1,328
Groups	614	626	638	651	664
Special Interest Groups	614	626	638	651	664
Student / OAP	614	626	638	651	664
Total Bednights	3,068	3,129	3,192	3,256	3,321
<b>Projected O/N Expenditure (NPV)</b>	<b>Year 11</b>	<b>Year 12</b>	<b>Year 13</b>	<b>Year 14</b>	<b>Year 15</b>
Overnight Visitors	€179,362	€175,913	€172,530	€169,212	€165,958
Overseas Visitors	€3,587	€3,518	€3,451	€3,384	€3,319
Domestic Visitors	€175,775	€172,395	€169,079	€165,828	€162,639

	Year 16	Year 17	Year 18	Year 19	Year 20
Visitor Numbers	67,082	67,753	68,431	69,115	69,806
FIT	26,833	27,101	27,372	27,646	27,922
Groups	20,125	20,326	20,529	20,734	20,942
Special Interest Groups	13,416	13,551	13,686	13,823	13,961
Student / OAP	3,354	3,388	3,422	3,456	3,490
Schools	3,354	3,388	3,422	3,456	3,490
<b>Projected Overnights</b>	<b>Year 16</b>	<b>Year 17</b>	<b>Year 18</b>	<b>Year 19</b>	<b>Year 20</b>
FIT	1,342	1,355	1,369	1,382	1,396
Groups	671	678	684	691	698
Special Interest Groups	671	678	684	691	698
Student / OAP	671	678	684	691	698
Total Bednights	3,354	3,388	3,422	3,456	3,490
<b>Projected O/N Expenditure (NPV)</b>	<b>Year 16</b>	<b>Year 17</b>	<b>Year 18</b>	<b>Year 19</b>	<b>Year 20</b>
Overnight Visitors	€161,171	€156,522	€152,007	€147,622	€143,363
Overseas Visitors	€3,223	€3,130	€3,040	€2,952	€2,867
Domestic Visitors	€157,947	€153,391	€148,966	€144,669	€140,496

	Year 21	Year 22	Year 23	Year 24	Year 25
Visitor Numbers	70,504	71,209	71,921	72,640	73,367
FIT	28,202	28,484	28,768	29,056	29,347
Groups	21,151	21,363	21,576	21,792	22,010
Special Interest Groups	14,101	14,242	14,384	14,528	14,673
Student / OAP	3,525	3,560	3,596	3,632	3,668
Schools	3,525	3,560	3,596	3,632	3,668
<b>Projected Overnights</b>	<b>Year 21</b>	<b>Year 22</b>	<b>Year 23</b>	<b>Year 24</b>	<b>Year 25</b>
FIT	1,410	1,424	1,438	1,453	1,467
Groups	705	712	719	726	734
Special Interest Groups	705	712	719	726	734
Student / OAP	705	712	719	726	734
Total Bednights	3,525	3,560	3,596	3,632	3,668
<b>Projected O/N Expenditure (NPV)</b>	<b>Year 21</b>	<b>Year 22</b>	<b>Year 23</b>	<b>Year 24</b>	<b>Year 25</b>
Overnight Visitors	€139,228	€135,212	€131,311	€127,524	€123,845
Overseas Visitors	€2,785	€2,704	€2,626	€2,550	€2,477
Domestic Visitors	€136,443	€132,507	€128,685	€124,973	€121,368

**Table 2: Economic Impact of Promotable<sup>18</sup> Day Visitors**

	Year 1	Year 2	Year 3	Year 4	Year 5
FIT	3,873	4,488	4,622	4,761	4,904
Groups	2,905	2,992	3,081	3,703	3,814
Special Interest	1,452	1,496	1,541	1,587	1,635
Student / OAP	1,452	1,496	1,541	2,116	2,179
Total Day Visits	9,682	10,471	10,785	12,167	12,532
<b>Projected Day Visit Expenditure (NPV)</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
Day Visitors	€232,740	€242,028	€239,700	€260,005	€257,505
Overseas Visitors	€4,655	€4,841	€4,794	€5,200	€5,150
Domestic Visitors	€228,086	€237,187	€234,906	€254,805	€252,355
Total Expenditure	€400,313	€407,989	€445,158	€463,487	€459,030
Total Overseas Exp	€8,006	€8,160	€8,903	€9,270	€9,181
Total Domestic Exp	€392,307	€399,830	€436,255	€454,217	€449,849

	Year 6	Year 7	Year 8	Year 9	Year 10
FIT	5,558	5,669	5,782	5,898	6,016
Groups	3,890	3,968	4,047	4,128	4,211
Special Interest	1,667	1,701	1,735	1,769	1,805
Student / OAP	2,223	2,267	2,313	2,359	2,406
Total Day Visits	13,338	13,605	13,877	14,155	14,438
<b>Projected Day Visit Expenditure (NPV)</b>	<b>Year 6</b>	<b>Year 7</b>	<b>Year 8</b>	<b>Year 9</b>	<b>Year 10</b>
Day Visitors	€263,533	€258,465	€253,495	€248,620	€243,839
Overseas Visitors	€5,271	€5,169	€5,070	€4,972	€4,877
Domestic Visitors	€258,263	€253,296	€248,425	€243,647	€238,962
Total Expenditure	€461,183	€452,314	€443,616	€435,085	€426,718
Total Overseas Exp	€9,224	€9,046	€8,872	€8,702	€8,534
Total Domestic Exp	€451,959	€443,268	€434,744	€426,383	€418,183

<sup>18</sup> Promotable Visitors are defined as domestic and international tourists attracted to Carrick on Suir to consume one or many tourism experiences including local attractions, amenities or ancillary services. Subsequent commentary provides separate analysis of the promotable visitor economic impact. For the purposes of the tourism impact analysis, no economic value is associated with community usage of the local amenities. Economic impact analysis and commentary is specific only to 'promotable' tourism activity in the area i.e. domestic and international visitors not residing in the area.

	Year 11	Year 12	Year 13	Year 14	Year 15
FIT	6,136	6,259	6,384	6,512	6,642
Groups	4,295	4,381	4,469	4,558	4,649
Special Interest	1,841	1,878	1,915	1,953	1,993
Student / OAP	2,454	2,503	2,554	2,605	2,657
Total Day Visits	14,726	15,021	15,321	15,628	15,940
<b>Projected Day Visit Expenditure (NPV)</b>	<b>Year 11</b>	<b>Year 12</b>	<b>Year 13</b>	<b>Year 14</b>	<b>Year 15</b>
Day Visitors	€239,150	€234,550	€230,040	€225,616	€221,277
Overseas Visitors	€4,783	€4,691	€4,601	€4,512	€4,426
Domestic Visitors	€234,367	€229,859	€225,439	€221,104	€216,852
Total Expenditure	€418,512	€410,463	€402,570	€394,828	€387,235
Total Overseas Exp	€8,370	€8,209	€8,051	€7,897	€7,745
Total Domestic Exp	€410,141	€402,254	€394,518	€386,932	€379,491

	Year 16	Year 17	Year 18	Year 19	Year 20
FIT	6,708	6,775	6,843	6,911	6,981
Groups	5,367	5,420	5,474	5,529	5,584
Special Interest	2,012	2,033	2,053	2,073	2,094
Student / OAP	2,683	2,710	2,737	2,765	2,792
Total Day Visits	16,771	16,938	17,108	17,279	17,451
<b>Projected Day Visit Expenditure (NPV)</b>	<b>Year 16</b>	<b>Year 17</b>	<b>Year 18</b>	<b>Year 19</b>	<b>Year 20</b>
Day Visitors	€223,848	€217,391	€211,120	€205,030	€199,116
Overseas Visitors	€4,477	€4,348	€4,222	€4,101	€3,982
Domestic Visitors	€219,371	€213,043	€206,898	€200,930	€195,134
Total Expenditure	€385,019	€373,913	€363,127	€352,652	€342,479
Total Overseas Exp	€7,700	€7,478	€7,263	€7,053	€6,850
Total Domestic Exp	€377,319	€366,434	€355,864	€345,599	€335,630

	Year 21	Year 22	Year 23	Year 24	Year 25
FIT	7,050	7,121	7,192	7,264	7,337
Groups	5,640	5,697	5,754	5,811	5,869
Special Interest	2,115	2,136	2,158	2,179	2,201
Student / OAP	2,820	2,848	2,877	2,906	2,935
Total Day Visits	17,626	17,802	17,980	18,160	18,342
<b>Projected Day Visit Expenditure (NPV)</b>	<b>Year 21</b>	<b>Year 22</b>	<b>Year 23</b>	<b>Year 24</b>	<b>Year 25</b>
Day Visitors	€193,372	€187,794	€182,377	€177,116	€172,007
Overseas Visitors	€3,867	€3,756	€3,648	€3,542	€3,440
Domestic Visitors	€189,505	€184,038	€178,729	€173,574	€168,567
Total Expenditure	€332,600	€323,006	€313,688	€304,640	€295,852
Total Overseas Exp	€6,652	€6,460	€6,274	€6,093	€5,917
Total Domestic Exp	€325,948	€316,546	€307,415	€298,547	€289,935

**Table 3: Employment Impact and Employment Income Impact**

	Year 1	Year 2	Year 3	Year 4	Year 5
Tourism Employment Direct	5	5	6	7	7
Employment Indirect	3	3	4	4	4
Employment Induced	2	2	3	3	3
Employment Impact	10	11	12	13	14
Total Projected Direct Employment Income (NPV)	€193,510	€197,220	€215,188	€224,048	€221,893
Total Projected Indirect Employment Income (NPV)	€126,555	€128,982	€140,733	€146,527	€145,118
Total Projected Induced Employment Income (NPV)	€81,274	€82,833	€90,379	€94,100	€93,195
Total Employment Impact (NPV)	€401,340	€409,035	€446,299	€464,675	€460,207

	Year 6	Year 7	Year 8	Year 9	Year 10
Tourism Employment Direct	7	7	7	7	8
Employment Indirect	5	5	5	5	5
Employment Induced	3	3	3	3	3
Employment Impact	15	15	15	15	16
Total Projected Direct Employment Income (NPV)	€222,934	€218,647	€214,442	€210,318	€206,274
Total Projected Indirect Employment Income (NPV)	€145,799	€142,995	€140,245	€137,548	€134,903
Total Projected Induced Employment Income (NPV)	€93,632	€91,832	€90,066	€88,334	€86,635
Total Employment Impact (NPV)	€462,365	€453,474	€444,753	€436,200	€427,812

	Year 11	Year 12	Year 13	Year 14	Year 15
Tourism Employment Direct	8	8	8	8	8
Employment Indirect	5	5	5	5	5
Employment Induced	3	3	3	3	4
Employment Impact	16	16	17	17	17
Total Projected Direct Employment Income (NPV)	€202,307	€198,416	€194,601	€190,858	€187,188
Total Projected Indirect Employment Income (NPV)	€132,309	€129,764	€127,269	€124,821	€122,421
Total Projected Induced Employment Income (NPV)	€84,969	€83,335	€81,732	€80,161	€78,619
Total Employment Impact (NPV)	€419,584	€411,516	€403,602	€395,840	€388,228

	Year 16	Year 17	Year 18	Year 19	Year 20
Tourism Employment Direct	9	9	9	9	9
Employment Indirect	6	6	6	6	6
Employment Induced	4	4	4	4	4
Employment Impact	18	18	18	18	19
Total Projected Direct Employment Income (NPV)	€186,117	€180,748	€175,534	€170,471	€165,553
Total Projected Indirect Employment Income (NPV)	€121,720	€118,209	€114,799	€111,488	€108,272
Total Projected Induced Employment Income (NPV)	€78,169	€75,914	€73,724	€71,598	€69,532
Total Employment Impact (NPV)	€386,006	€374,871	€364,057	€353,556	€343,357

	Year 21	Year 22	Year 23	Year 24	Year 25
Tourism Employment Direct	9	9	9	9	9
Employment Indirect	6	6	6	6	6
Employment Induced	4	4	4	4	4
Employment Impact	19	19	19	19	20
Total Projected Direct Employment Income (NPV)	€160,778	€156,140	€151,636	€147,262	€143,014
Total Projected Indirect Employment Income (NPV)	€105,148	€102,115	€99,170	€96,309	€93,531
Total Projected Induced Employment Income (NPV)	€67,527	€65,579	€63,687	€61,850	€60,066
Total Employment Impact (NPV)	€333,453	€323,834	€314,492	€305,421	€296,610

	Year 1	Year 2	Year 3	Year 4	Year 5
<b>Economic Impact (NPV)</b>					
Direct Expenditure	€400,313	€407,989	€445,158	€463,487	€459,030
Indirect Expenditure	€260,204	€265,193	€289,353	€301,266	€298,370
Induced Expenditure	€180,141	€183,595	€200,321	€208,569	€206,564
Total Expenditure Impact	€840,658	€856,778	€934,832	€973,322	€963,963
<b>Exchequer Impact (NPV)</b>					
Exchequer Returns (Direct)	€127,300	€129,741	€141,560	€147,389	€145,972
Exchequer Returns	€267,329	€272,455	€297,276	€309,516	€306,540

	Year 6	Year 7	Year 8	Year 9	Year 10
<b>Economic Impact (NPV)</b>					
Direct Expenditure	€461,183	€452,314	€443,616	€435,085	€426,718
Indirect Expenditure	€299,769	€294,004	€288,350	€282,805	€277,367
Induced Expenditure	€207,532	€203,541	€199,627	€195,788	€192,023
Total Expenditure Impact	€968,485	€949,860	€931,593	€913,678	€896,107
<b>Exchequer Impact (NPV)</b>					
Exchequer Returns (Direct)	€146,656	€143,836	€141,070	€138,357	€135,696
Exchequer Returns	€307,978	€302,055	€296,247	€290,550	€284,962

	Year 11	Year 12	Year 13	Year 14	Year 15
<b>Economic Impact (NPV)</b>					
Direct Expenditure	€418,512	€410,463	€402,570	€394,828	€387,235
Indirect Expenditure	€272,033	€266,801	€261,670	€256,638	€251,703
Induced Expenditure	€188,330	€184,709	€181,156	€177,673	€174,256
Total Expenditure Impact	€878,875	€861,973	€845,397	€829,139	€813,194
<b>Exchequer Impact (NPV)</b>					
Exchequer Returns (Direct)	€133,087	€130,527	€128,017	€125,555	€123,141
Exchequer Returns	€279,482	€274,107	€268,836	€263,666	€258,596



	Year 16	Year 17	Year 18	Year 19	Year 20
<b>Economic Impact (NPV)</b>					
Direct Expenditure	€385,019	€373,913	€363,127	€352,652	€342,479
Indirect Expenditure	€250,262	€243,043	€236,032	€229,224	€222,612
Induced Expenditure	€173,259	€168,261	€163,407	€158,693	€154,116
Total Expenditure Impact	€808,540	€785,217	€762,566	€740,569	€719,206
<b>Exchequer Impact (NPV)</b>					
Exchequer Returns (Direct)	€122,436	€118,904	€115,474	€112,143	€108,908
Exchequer Returns	€257,116	€249,699	€242,496	€235,501	€228,708

	Year 21	Year 22	Year 23	Year 24	Year 25
<b>Economic Impact (NPV)</b>					
Direct Expenditure	€332,600	€323,006	€313,688	€304,640	€295,852
Indirect Expenditure	€216,190	€209,954	€203,897	€198,016	€192,304
Induced Expenditure	€149,670	€145,353	€141,160	€137,088	€133,133
Total Expenditure Impact	€698,460	€678,312	€658,745	€639,743	€621,289
<b>Exchequer Impact (NPV)</b>					
Exchequer Returns (Direct)	€105,767	€102,716	€99,753	€96,875	€94,081
Exchequer Returns	€222,110	€215,703	€209,481	€203,438	€197,570

**Table 4: GVA Impact of Additionality due to Economic Activity (NPV)**

	Year 1	Year 2	Year 3	Year 4	Year 5
GVA (NPV)	€328,967	€335,275	€365,819	€380,881	€377,219
GVA Indirect	€216,460	€220,611	€240,709	€250,620	€248,210
GVA Induced	€125,007	€127,404	€139,011	€144,735	€143,343
GVA Impact	€670,434	€683,290	€745,539	€776,235	€768,772

	Year 6	Year 7	Year 8	Year 9	Year 10
GVA (NPV)	€378,988	€371,700	€364,552	€357,541	€350,665
GVA Indirect	€249,374	€244,578	€239,875	€235,262	€230,738
GVA Induced	€144,015	€141,246	€138,530	€135,866	€133,253
GVA Impact	€772,377	€757,524	€742,956	€728,669	€714,656

	Year 11	Year 12	Year 13	Year 14	Year 15
GVA (NPV)	€343,922	€337,308	€330,821	€324,459	€318,220
GVA Indirect	€226,300	€221,949	€217,680	€213,494	€209,388
GVA Induced	€130,690	€128,177	€125,712	€123,294	€120,923
GVA Impact	€700,912	€687,433	€674,213	€661,248	€648,531

	Year 16	Year 17	Year 18	Year 19	Year 20
GVA (NPV)	€316,398	€307,271	€298,408	€289,800	€281,440
GVA Indirect	€208,190	€202,185	€196,352	€190,688	€185,188
GVA Induced	€120,231	€116,763	€113,395	€110,124	€106,947
GVA Impact	€644,820	€626,219	€608,155	€590,612	€573,575

	Year 21	Year 22	Year 23	Year 24	Year 25
GVA (NPV)	€273,322	€265,438	€257,781	€250,345	€243,123
GVA Indirect	€179,846	€174,658	€169,620	€164,727	€159,975
GVA Induced	€103,862	€100,866	€97,957	€95,131	€92,387
GVA Impact	€557,030	€540,962	€525,357	€510,202	€495,485

**Incremental Growth Projections – Table 1 - Summary**

<b>Economic Tourism Impact</b>	<b>Years 1-5</b>	<b>Years 6-10</b>	<b>Years 11-15</b>	<b>Years 16-20</b>	<b>Years 21-25</b>
Net Total Incremental Visitor Numbers, of which	303,613	452,191	572,535	661,411	748,412
- Community	123,839	165,360	219,210	262,268	302,278
- Domestic	140,329	177,297	221,398	250,656	282,084
- International	39,445	109,534	131,926	148,487	164,050
Incremental Bednights	64,984	96,750	117,812	133,430	148,226
Incremental Direct Tourist Expenditure €	€8,718,301	€15,127,720	€21,663,654	€26,830,871	€32,588,803
Value of Incremental Community Usage of Blueway (Willingness to Pay basis) €	€969,147	€1,323,271	€1,737,409	€2,063,963	€2,370,149
Incremental Exchequer Returns (based on Direct Expenditure)	€2,772,420	€4,810,615	€6,889,042	€8,532,217	€10,363,239
Incremental Average Annual Direct Employment (FTE)	21	36	52	64	78
Incremental Direct GVA Impact	€7,164,466	€12,431,555	€17,802,610	€22,048,891	€26,780,605

**NOTES**

- All monetary data in constant 2022 Euro, undiscounted
- Year 0 baseline considers a single blueway user activating counters twice (out and back journey from a trailhead) on assumption of lower tourism profile and experience within the destination.
- Investment model developed based on growth of tourism from international and domestic visitors. Adjustment to community users in Year4/5.
- Increase in visitor spend in investment model in Years 6, 11, 16, 21 to allow for maturing destination with an increasing tourism offering and dwell time of visitors.

**Incremental Growth Projections – Table 2 Annual Incremental Change in Visitor Numbers**

	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
Visitor Numbers, (Investment in Regeneration Plan)	47,000	94,000	103,400	113,740	121,702	127,787
Visitor Numbers (no investment)	47,000	48,410	49,862	51,358	52,899	54,486
		45,590	53,538	62,382	68,803	73,301
Incremental		47,000	56,400	66,740	74,702	80,787
		1,410	2,862	4,358	5,899	7,486
Net Incremental		45,590	53,538	62,382	68,803	73,301

		Year 6	Year 7	Year 8	Year 9	Year 10
Visitor Numbers, (Investment in Regeneration Plan)		134,176	140,885	147,929	155,326	163,092
Visitor Numbers (no investment)		55,576	56,687	57,821	58,977	60,157
		78,601	84,198	90,108	96,348	102,935
Incremental		87,176	93,885	100,929	108,326	116,092
		8,576	9,687	10,821	11,977	13,157
Net Incremental		78,601	84,198	90,108	96,348	102,935

		Year 11	Year 12	Year 13	Year 14	Year 15
Visitor Numbers, (Investment in Regeneration Plan)		167,985	173,024	178,215	183,562	189,068
Visitor Numbers (no investment)		61,360	62,587	63,839	65,116	66,418
		106,625	110,437	114,376	118,446	122,650
Incremental		120,985	126,024	131,215	136,562	142,068
		14,360	15,587	16,839	18,116	19,418
Net Incremental		106,625	110,437	114,376	118,446	122,650

		Year 16	Year 17	Year 18	Year 19	Year 20
Visitor Numbers, (Investment in Regeneration Plan)		192,850	196,707	200,641	204,654	208,747
Visitor Numbers (no investment)		67,082	67,753	68,431	69,115	69,806
		125,768	128,954	132,210	135,539	138,941
Incremental		145,850	149,707	153,641	157,654	161,747
		20,082	20,753	21,431	22,115	22,806
Net Incremental		125,768	128,954	132,210	135,539	138,941

		Year 21	Year 22	Year 23	Year 24	Year 25
Visitor Numbers, (Investment in Regeneration Plan)		212,922	217,180	221,524	225,954	230,473
Visitor Numbers (no investment)		70,504	71,209	71,921	72,640	73,367
		142,418	145,971	149,603	153,314	157,107
Incremental		165,922	170,180	174,524	178,954	183,473
		23,504	24,209	24,921	25,640	26,367
Net Incremental		142,418	145,971	149,603	153,314	157,107

**Incremental Growth Projections – Table 3: Annual Incremental Change in Community Use**

	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
Community Use - (Investment in Regeneration Plan)	35,720	59,220	62,040	63,694	64,502	63,893
Community Use - (no investment)	35,720	36,792	37,397	38,005	38,087	39,230
		22,428	24,643	25,689	26,415	24,664
Incremental		23,500	26,320	27,974	28,782	28,173
		1,072	1,677	2,285	2,367	3,510
Net Incremental		22,428	24,643	25,689	26,415	24,664

		Year 6	Year 7	Year 8	Year 9	Year 10
Community Use - (Investment in Regeneration Plan)		67,088	70,443	73,965	77,663	81,546
Community Use - (no investment)		39,459	40,248	41,053	41,874	42,711
		27,629	30,195	32,912	35,789	38,835
Incremental		31,368	34,723	38,245	41,943	45,826
		3,739	4,528	5,333	6,154	6,991
Net Incremental		27,629	30,195	32,912	35,789	38,835

		Year 11	Year 12	Year 13	Year 14	Year 15
Community Use - (Investment in Regeneration Plan)		83,992	86,512	89,108	91,781	94,534
Community Use - (no investment)		43,566	44,437	45,326	46,232	47,157
		40,427	42,075	43,782	45,549	47,377
Incremental		48,272	50,792	53,388	56,061	58,814
		7,846	8,717	9,606	10,512	11,437
Net Incremental		40,427	42,075	43,782	45,549	47,377

		Year 16	Year 17	Year 18	Year 19	Year 20
Community Use - (Investment in Regeneration Plan)		96,425	98,353	100,320	102,327	104,373
Community Use - (no investment)		46,958	47,427	47,901	48,380	48,864
		49,467	50,926	52,419	53,946	55,509
Incremental		60,705	62,633	64,600	66,607	68,653
		11,238	11,707	12,181	12,660	13,144
Net Incremental		49,467	50,926	52,419	53,946	55,509

		Year 21	Year 22	Year 23	Year 24	Year 25
Community Use - (Investment in Regeneration Plan)		106,461	108,590	110,762	112,977	115,237
Community Use - (no investment)		49,353	49,846	50,345	50,848	51,357
		57,108	58,744	60,417	62,129	63,880
Incremental		70,741	72,870	75,042	77,257	79,517
		13,633	14,126	14,625	15,128	15,637
Net Incremental		57,108	58,744	60,417	62,129	63,880

**Incremental Growth Projections – Table 4: Direct Tourism Expenditure**

	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
Direct Tourist Expenditure € Investment in regeneration plan)	€404,200	€1,602,700	€1,907,730	€2,286,174	€2,537,483	€2,843,258
Direct Tourist Expenditure € (no investment)	€404,200	€416,326	€441,281	€500,742	€542,214	€558,480
		€1,186,374	€1,466,449	€1,785,432	€1,995,269	€2,284,778
Incremental		€1,198,500	€1,503,530	€1,881,974	€2,133,283	€2,439,058
		€12,126	€37,081	€96,542	€138,014	€154,280
Net Incremental		€1,186,374	€1,466,449	€1,785,432	€1,995,269	€2,284,778

	Year 6	Year 7	Year 8	Year 9	Year 10
Direct Tourist Expenditure € Investment in regeneration plan)	€3,287,318	€3,451,684	€3,624,268	€3,805,481	€3,995,755
Direct Tourist Expenditure € (no investment)	€583,544	€595,215	€607,119	€619,261	€631,647
	€2,703,774	€2,856,469	€3,017,149	€3,186,220	€3,364,109
Incremental	€2,883,118	€3,047,484	€3,220,068	€3,401,281	€3,591,555
	€179,344	€191,015	€202,919	€215,061	€227,447
Net Incremental	€2,703,774	€2,856,469	€3,017,149	€3,186,220	€3,364,109

	Year 11	Year 12	Year 13	Year 14	Year 15
Direct Tourist Expenditure € Investment in regeneration plan)	€4,711,974	€4,853,333	€4,998,933	€5,148,901	€5,303,368
Direct Tourist Expenditure € (no investment)	€644,279	€657,165	€670,308	€683,715	€697,389
	€4,067,695	€4,196,168	€4,328,625	€4,465,187	€4,605,979
Incremental	€4,307,774	€4,449,133	€4,594,733	€4,744,701	€4,899,168
	€240,079	€252,965	€266,108	€279,515	€293,189
Net Incremental	€4,067,695	€4,196,168	€4,328,625	€4,465,187	€4,605,979



		Year 16	Year 17	Year 18	Year 19	Year 20
Direct Tourist Expenditure € (Investment in regeneration plan)		€5,862,633	€5,979,885	€6,099,483	€6,221,473	€6,345,902
Direct Tourist Expenditure € (no investment)		€721,133	€728,345	€735,628	€742,984	€750,414
		€5,141,499	€5,251,541	€5,363,855	€5,478,488	€5,595,488
Incremental		€5,458,433	€5,575,685	€5,695,283	€5,817,273	€5,941,702
		€316,933	€324,145	€331,428	€338,784	€346,214
Net Incremental		€5,141,499	€5,251,541	€5,363,855	€5,478,488	€5,595,488

		Year 21	Year 22	Year 23	Year 24	Year 25
Direct Tourist Expenditure € (Investment in regeneration plan)		€7,005,124	€7,145,227	€7,288,131	€7,433,894	€7,582,572
Direct Tourist Expenditure € (no investment)		€757,918	€765,498	€773,152	€780,884	€788,693
		€6,247,206	€6,379,729	€6,514,979	€6,653,010	€6,793,879
Incremental		€6,600,924	€6,741,027	€6,883,931	€7,029,694	€7,178,372
		€353,718	€361,298	€368,952	€376,684	€384,493
Net Incremental		€6,247,206	€6,379,729	€6,514,979	€6,653,010	€6,793,879

**Incremental Growth Projections – Table 5: Value of Community Usage (Willingness to Pay basis)**

	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
Value Community Usage of Blueway (WtP basis) € (investment in regeneration plan)	€254,221	€431,505	€455,125	€471,994	€482,046	€482,012
Value Community Usage of Blueway (WtP basis) € (no investment)	€254,221	€261,848	€266,564	€271,327	€272,806	€280,990
		€169,657	€188,562	€200,666	€209,240	€201,022
Incremental		€177,284	€200,904	€217,773	€227,825	€227,791
		€7,627	€12,343	€17,106	€18,585	€26,769
Net Incremental		€169,657	€188,562	€200,666	€209,240	€201,022

		Year 6	Year 7	Year 8	Year 9	Year 10
Value Community Usage of Blueway (WtP) € (investment in regeneration plan)		€506,113	€531,418	€557,989	€585,889	€615,183
Value Community Usage of Blueway (WtP) € (no investment)		€283,111	€288,773	€294,549	€300,440	€306,448
		€223,002	€242,645	€263,441	€285,449	€308,735
Incremental		€251,892	€277,197	€303,768	€331,668	€360,962
		€28,890	€34,552	€40,328	€46,219	€52,227
Net Incremental		€223,002	€242,645	€263,441	€285,449	€308,735

		Year 11	Year 12	Year 13	Year 14	Year 15
Value Community Usage of Blueway (WtP) € (investment in regeneration plan)		€633,639	€652,648	€672,227	€692,394	€713,166
Value Community Usage of Blueway (WtP) € (no investment)		€312,577	€318,829	€325,206	€331,710	€338,344
		€321,061	€333,819	€347,022	€360,684	€374,822
Incremental		€379,418	€398,427	€418,006	€438,173	€458,945
		€58,356	€64,608	€70,985	€77,489	€84,123
Net Incremental		€321,061	€333,819	€347,022	€360,684	€374,822

	Year 16	Year 17	Year 18	Year 19	Year 20
Value Community Usage of Blueway WtP basis) € (investment in regeneration plan)	€727,429	€741,978	€756,817	€771,954	€787,393
Value Community Usage of Blueway (WtP basis) € (no investment)	€337,504	€340,879	€344,288	€347,730	€351,208
	€389,925	€401,099	€412,530	€424,223	€436,185
Incremental	€473,208	€487,757	€502,596	€517,733	€533,172
	€83,283	€86,658	€90,067	€93,509	€96,987
Net Incremental	€389,925	€401,099	€412,530	€424,223	€436,185

	Year 21	Year 22	Year 23	Year 24	Year 25
Value Community Usage of Blueway (WtP) € (investment in regeneration plan)	€803,141	€819,204	€835,588	€852,299	€869,345
Value Community Usage of Blueway (WtP basis) € (no investment)	€354,720	€358,267	€361,850	€365,468	€369,123
	€448,421	€460,936	€473,738	€486,831	€500,222
Incremental	€548,920	€564,983	€581,367	€598,078	€615,124
	€100,499	€104,046	€107,629	€111,247	€114,902
Net Incremental	€448,421	€460,936	€473,738	€486,831	€500,222

