



global environmental solutions



DRAFT REPORT FOR COMMENT

**Galtee Mountains:
Tourism Development Facilitation and Project Management**

**Ballyhoura Development Limited
Kilfinnane, Co Limerick**



**June 2011
SLR Ref: 501.00223.00001.Rev0**



global environmental solutions



An Roinn Gnóthaí Pobail,
Comhionannais agus Gaeltachta
Department of Community, Equality
and Gaeltacht Affairs



The European Agricultural
Fund
for Rural Development:
Europe investing in Rural
Areas.



Ballyhoura Development Limited and South Tipperary Development Co. Limited

***acknowledge the financial assistance received from the Department of Community,
Equality and Gaeltacht Affairs and the European Union***

TABLE OF CONTENTS

Executive Summary

1.0	INTRODUCTION	1
1.1	Terms of Reference.....	1
1.2	Boundaries of the Study.....	2
1.3	Galtee Communities.....	3
1.4	Approach & Methodology	4
2.0	PLANNING FOR TOURISM.....	6
2.1	Overview of Tourism Trends.....	6
2.2	Economic Context for Recreational Tourism.....	7
2.3	Local Performance Data	10
3.0	GALTEES: PLANNING & ENVIRONMENTAL FRAMEWORK.....	11
3.1	Geological Character	11
3.2	Environmental Designations.....	11
3.3	Galtee Mountains Conservation Plan (2005-2010) NPWS.....	15
4.0	REVIEW OF EXISTING FACILITIES/ INFRASTRUCTURE	16
4.1	Access	16
4.2	Recreational Amenities.....	16
4.3	Challenges: Physical Environment	23
4.4	Cultural Heritage	25
4.5	Community Assets	28
4.6	Services & Amenities.....	29
4.7	Public Supports & Partnerships.....	32
4.8	Galtees: Summary Marketing Mix.....	32
4.9	Comparative Analysis: the Scope for Destination Development	34
5.0	STAKEHOLDER CONSULTATIONS	37
5.1	SWOT ANALYSIS – Galtee Mountains Tourism Development.....	38
5.2	Consultative Forum 1.....	42
5.3	Steering Group	46
6.0	THE WAY FORWARD	48
6.1	Galtee Mountains: Action Plan	48
6.2	Possible Priority Actions for Development of World Class Destination.....	50
7.0	CONCLUSIONS & RECOMMENDATIONS	52
7.1	Conclusions	52
7.2	Recommendations	53
8.0	CLOSURE	54

FIGURES

Figure 1: Sketch map showing boundaries of 'Galtee Mountains' area of influence

Figure 2: Graphic representation of ranking of 'Big Ideas' @*Mitchelstown* 7/6/11

Figure 3: Outline Structure for Galtee Mountains Partnership

MAPS

Map 1: Geological Map of the Galtee, Slievenamuck & Ballyhoura Mountains

Map 2: Candidate Special Areas of Conservation (SAC) Sites of the Galtee Mountains

Map 3: Natural Heritage Areas (NHA) and proposed NHA, Galtee Mountains

Map 4: High Amenity Areas of South West Tipperary

Map 5: High Amenity Areas of Limerick

Map 6: Cultural Elements Protected within the Galtee Mountains (South Tipperary)

Map 7: Glen of Aherlow Amenities Map

TABLES

Table 1: Looped Walks of the Galtee Mountains catchment

Table 2: Challenges: Physical Environment

Table 3: Galtee Mountains -Tourism Facilities & Services Profile

Table 4: Galtee Mountains : Marketing Mix

Table 5: Destination Comparison: Galtee Mountains vs Green Box

Table 6: Galtee Mountains: Summary Feedback

Table 7: Galtee Mountains: SWOT Analysis

Table 8: Ranking of 'Big Ideas' @ *Mitchelstown* 7/6/11

Table 9: Not So Big Ideas' proposed @ *Mitchelstown* 7/6/11

APPENDICES

Appendix A: Map A1 – Recreational Infrastructure : Galtee Mountains

Appendix B: List of Consultees, Galtee Mountains Tourism Facilitation

Appendix C: Attendees at Consultative Forum 1, Mitchelstown 7/6/11

Executive Summary

A Baseline Study was conducted in 2006 to scope the potential for an integrated approach to tourism development in the Galtee Mountains, which straddle the three counties of Limerick, South Tipperary and Cork. This Phase 1 study was carried out during March–May 2011 to identify and facilitate a Steering Group to develop a series of project ideas, which would be scoped and tendered, with a view to adding to the current recreational offering in the Galtees. The ultimate objective is to develop a vibrant and internationally significant tourism destination.

For the purpose of this study, the 'Galtee Mountains' encompasses almost 800km² within the portal towns of Kilfinane (west), Cahir (east), Tipperary Town (north) and Mitchelstown (south). A network of 10 villages ('beads') host vibrant communities in a 'necklace' around the foothills of the mountains, some with excellent examples of rural vernacular and cultural heritage. The population is largely agriculturally based, although significant numbers commute to larger towns and Cork, Limerick and Waterford to work. All of the communities consulted have highly active voluntary, parish-based community development councils, Muintir na Tíre, ICA and GAA clubs at local level. There will be a need to move to a more regional 'Galtees' vision.

The upland areas of the Galtees, as well as selected river courses (Suir, Aherlow) are environmentally protected as candidate Special Areas of Conservation (cSACs) and proposed Natural Heritage Area (pNHA) designations, based on the assemblage of habitats, rare flora and birds present on the mountains. There are official 'activities requiring consent' (ARCs) which may prohibit 'hard' development in the upland areas, particularly in relation to commercial developments.

Existing recreational 'brands' are already operating successfully including '*Ballyhoura Country*', centred in Kilfinane; '*Aherlow Fáilte*', centred in Glen of Aherlow and '*Excel*' in Tipperary Town, previously a garrison town with strong architectural and heritage features. Cahir is a designated heritage town, with the eponymous Cahir Castle as the jewel, while Mitchelstown is an excellent example of an 18th century planned town, with very significant architectural features. It is increasingly focused on development of tourism, with particular emphasis on food, given its long traditions, and recreation in the Galtees. The *Glen of Aherlow* and *Ballyhoura Country* have strategically positioned themselves nationally in terms of rural recreational tourism in the north and northwest of the ranges; there is scope to expand this further to an international reach. Mitchelstown Caves and Cahir Castle attract c. 65,000 visitors per annum, yet there is not a strong tradition of tourism development to the south and southeast of the mountains.

The supporting services are good in the four towns, offering hotel, guesthouse, B&B accommodation and a range of bistro style restaurants. The villages require additional 'walker-friendly' accommodation and food outlets, while locally (e.g. Kilfinane, Glen of Aherlow) a range of inter-dependent services exist (recreation, information, food, camping, B&B, hotel, hostel, restaurant), coupled with local heritage and environment.

Additionally, three Fáilte Ireland *Centres of Excellence* are located in the Galtees catchment:

- Glen of Aherlow - Walking centre of excellence
- Ballyhoura - Mountain Biking centre of excellence
- Cahir - Angling centre of excellence

Walking, hiking, biking, rock climbing, paragliding, equestrian, angling, orienteering, hill running, downhill biking are all happening regularly in the Galtees, with up to 25,000 alone attending the Ballyhoura Mountain Biking facilities per annum. There is huge scope to retain these visitors for longer. Country pursuits are popular locally with a number of equestrian, gun & game conservation, shooting facilities and angling clubs in the district. Some of these elements could become part of the tourism product mix. A number of local residents are active walking members of the Galtee Mountains Walking Club and the Ballyhoura Bears Walking Club. There is a strong

tradition of volunteer-supported, walking/ biking/ arts/ heritage festivals which are gathering in number, variety and strength, and increasingly pitched to an international audience.

The 'necklace' communities of the Galtees are dispersed, often with weak knowledge of 'what is over the mountain', with natural rivalries for scarce resources. It is clear that developmental work will be required to build a single vision, identify projects and unified branding for the Galtee Mountains Initiative at community level.

The key SWOT issues may be distilled to:

- Galtees straddle 3 counties: no coordinated plan for the whole area.
- Poor signage off motorways/ regional roads, often badly located and inconsistent
- Recreational parking facilities at many access points are inadequate
- Weak sense of '**Destination**': lack of accommodation-food-activity packaging
- Economic spin-offs are minimised due to short-stay or day-trippers: challenge this
- Strong environmental protection, but environmental pressure from: walking tracks, quads, scrambling, burning scrub;
- Joint 'Galtees' vision & plan required to combat natural parochialism
- New brand reflecting the activity base required: e.g. ***Go Galtees!***
- Strategic Plan required, with strong Driver/ Steering Group.

Despite the natural and cultural strengths within the Galtees, there is an intense parochialism with healthy competition among adjacent parishes. Although, the existing brands are well positioned, there is scope to go to a new level and build an outdoor recreational integrated destination on the highest inland mountains on the island. It will be critical to overcome these natural rivalries to build a world-class tourism destination. This must be delivered in such a way so as not to threaten existing brands which have been built up over years; however, collaboration amongst all parties will allow the Galtees to compete in an ever-crowded market place.

The work in Phase 1 has focussed on wide consultation to build a sense of 'the possible' and to develop ownership of a challenging but vibrant project, such as '*Go Galtees!*' to signify the activity-based /food/ heritage product, suited to outdoor activists, family groups and active retired. A Steering Group has now been identified to take the project to the next level. Phase 2 will address the recommendations of this report.

It is recommended that:

- ✓ Steering Group (SG) to be convened at the earliest stage
- ✓ Facilitation of the SG to focus on strategic planning to deliver resources and projects as identified in Phase 1, agreed actions, targets and timeframe for delivery;
- ✓ That 'Galtee Mountains Partnership' building commence at the earliest stages (public, private, community);
- ✓ Provision of key public infrastructure will be critical to support private sector investment – integrated 'Galtees' signage, parking, outdoor facilities as required by specific projects;
- ✓ Core products and services will require development, enhancement, integration, packaging and bundling, marketing and delivery. It is recommended that networking of service providers commence to build a common vision, brand and understanding of the overall project potential.
- ✓ Capacity building will be required for specific projects and service delivery;
- ✓ Establishment of promotional resources, website, calendar of events etc
- ✓ Effective communications both internal and external;
- ✓ Community support will be vital to all of the above – supports must be offered to them in the form of 'early wins' through festivals, increased visitor numbers; implementation of novel ideas such as gold panning, archaeological tours, photographic displays etc.

1.0 INTRODUCTION

SLR Environmental Consulting Ireland Limited (SLR) was commissioned to facilitate the **Galtee Mountains: Tourism Development Facilitation and Project Management** by Ballyhoura Development Limited (BDL), in conjunction with South Tipperary Development Company (STDC), in early 2011. The study aimed to develop an integrated tourism development approach to the Galtee Mountains, which straddle three counties, three tourism regions and two development company zones. Consequently, the Galtees are underperforming as a tourism destination, as it has not been prioritised to date by a lead agency.

In 2006, a baseline study was commissioned by BDL and was carried out by consultant Denis Keane (DK), to scope the potential for an integrated approach to tourism development in the Galtee Mountains. DK reviewed the country development plans of the three county councils and the current tourism infrastructure. He concluded that there was significant scope for development, if a unifying 'hook' could be identified to draw the various actors, policy makers and communities together. DK proposed the concept of a UNESCO-designated Geopark, as has been developed along the Waterford Copper Coast and the Cuilcagh Mountains, Cos. Cavan and Fermanagh.

Subsequently in 2010, the clients commissioned this work to develop an integrated, activity-based recreational tourism base, to deliver local enterprise, employment and revenues to the region. The work was divided to two phases (see 1.1 below) and this report marks the completion of Phase 1.

Phase 1 sought, through extensive consultations, to identify a potential Steering Group, and also to map the current and requisite levels of infrastructure to support an integrated tourism base, while also identifying the gaps and supports required to attract and retain visitors in a vibrant tourism destination.

SLR senior personnel, Deirdre Lewis (geologist, environment & recreational activity expert) and Alan Hill (tourism development, marketing & communications expert) have worked with local community activists, businesses and support agencies, to identify a Steering Group and suitable projects to enhance the capacity of the Galtee Mountains to become a world class, recreational activity base. The SLR team had recently carried out work on development of a *Recreational Strategy of the Knockmealdown Mountains* in early 2011 and many of the community and 'agency' consultees were sourced from contacts made in that study.

1.1 Terms of Reference

The Terms of Reference for the project are as set out below. The 2006 baseline study on the Galtees, referred to below, set the groundwork for this phase of work.

Background: The baseline study of the Galtee Mountains identified the areas potential for tourism development through interpretation of the geological, cultural and heritage of the mountains and its surrounding areas and potential for outdoor recreation activities. The rationale for the project is that the Galtee Mountains, Ireland's highest inland peaks, represent some of the finest sites for geo and eco tourism in Ireland and if developed appropriately and supported through targeted marketing could yield benefits to local communities who co-exist within the Galtee Mountains area. The project will create a demand for the area's natural and manmade attractions as well as enhance the visitor experience by providing a high quality visitor interpretation product through a well trained pool of professional guides for the area.

The Role: The role at this early stage of development is one of project facilitation and management. Facilitation and management of the development of a steering group with a mix of public and private and community partners to guide the project development will be key prior to working with the steering group to develop and agree specifications and evaluation criteria for further studies and for the overall strategic development plan that will be required.

Work Plan Phase One

- Contact and convince key individuals within the public and community sectors to participate in the steering group.
- Facilitate and manage the group discussions based on Galtee baseline study and agree terms of reference for the group.
- Advice on market suitability and value added for identified proposals from the steering group and within the baseline study.
- Develop specifications for additional studies/feasibilities that will be required.
- Place specifications for tender.
- Evaluate tenders with Steering Group.

Work Plan Phase Two

- Manage delivery of studies.
- Determine skills and resources needed for the developments.
- Identify strategic partners and potential private investors to deliver on the proposals.
- Organise debrief to community representatives

Date of commencement: Autumn 2010
Responsible to: Project Steering Group

1.2 Boundaries of the Study

The Galtee Mountains straddle three counties of Tipperary, Limerick and Cork, within a highly agricultural, pastoral landscape of high visual amenity. The consultants, in discussion with the Client, defined the boundaries of the area at the early stages of the project to include the zones between the 'portal' towns of Cahir, Tipperary, Kilfinane and Mitchelstown. This includes the eastern portion of the Ballyhoura Hills, Glen of Aherlow and Slievenamuck, as well as all the communities in the foothills of the Galtees. This large area encloses c. 800km².

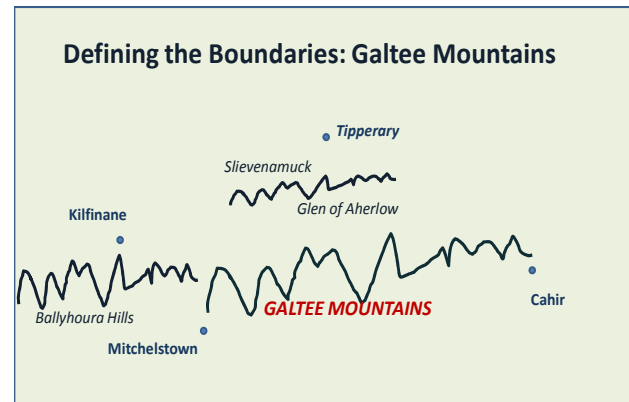


Figure 1:
Sketch Map showing Boundaries of 'Galtees' Area

1.3 Galtee Communities

There are four 'portal' towns at the approaches to the Galtees: from the west, **Kilfinnane**, Co Limerick; from the east, **Cahir**, and from the north, **Tipperary Town**, both in South Co. Tipperary and from the southwest, **Mitchelstown**, Co Cork. Each of these towns is pivotal in providing a range of requisite supporting services. The M8 passes along the southern margins of the Galtees, providing a critical link to Ireland's busiest tourist conduit between Dublin and the Southwest.

- ❖ **Cahir** is an attractive, designated heritage town, with a population of 3,380, serving a catchment of 5,000 people. It is situated at the northeast end of the Galtee Mountains and strategically located just off the M8 motorway. It has a strong focus on heritage tourism, with the magnificent Cahir Castle and Swiss Cottage at its hub. It has been designated also as a Centre of Excellence for Angling on the River Suir and its tributaries, particularly the Aherlow River in this context. It has a good mix of both community festival and tourist activities throughout the year.
- ❖ **Mitchelstown** is an attractive, planned town in northeast Cork, 27km southwest of Cahir via the N8 or M8 roads, with a population of 4,500 people. It is situated at the southwest foothills of the Galtees. The town has seen a decline in employment in the Mitchelstown Co-Operative over recent decades and is increasingly looking to expand its tourism base, particularly focussed on food and outdoor recreation. It has limited tourism infrastructure, but has a proud literary tradition, exceptional architecture, and a unique history of cheese production, all of which could form the core of a tourism experience.
- ❖ **Kilfinane** is an attractive small town in southeast Co Limerick, with a population of 1100 people (2006). The town is at the heart of the Ballyhoura mountains and the local communities have been focussed over 20 years in development of walking trails, mountain biking trails and associated aspects of tourism development and supports. Kilfinane is at the heart of the 'Ballyhoura Country' rural tourism initiative and has been designated as a Centre of Excellence for Mountain Biking, which currently attracts 25,000 people per annum, and growing. Kilfinane offers a full array of looped and long distance walking trails, cycle routes, orienteering, shooting range, cycle repairs and a local accommodation base which services both the activities and festivals.
- ❖ **Tipperary Town** is a vibrant market town of about 5,000 people, which has seen a decline in traditional employment in the local Co-Operative and other industries; however, it has also sought to re-position itself with a broader focus on tourism, heritage and culture. The Excel Centre in the town has for 10 years promoted heritage and modern culture, as well as genealogy and tourism information. The town is at the confluence of a number of long distance walking trails, and is a heritage town with attractive trails and streetscapes, with a good food and accommodation base. It is twinned with Steinmark in Austria, with cultural exchanges focussed on music, dance, walking, and all aspects heritage. Tipp Town also has a cohort of fully certified walking guides.

Ten villages form the beads of a 'necklace' surrounding the Galtees.

On the south side, the villages of **Ballylooby**, **Burncourt**, **Skeheenarinky** and **Kilbehenny** in County Tipperary have strong communities based on an agricultural tradition, but generally with a weak tourism infrastructure (accommodation, food, recreational services). The iconic *Mitchelstown Caves* are privately run and attract 10,000 people per annum, located just south of the M8 near the village of Burncourt. Kilbehenny is attempting to develop a 'walker friendly' facility in its community hall to service walkers accessing the Galtees along the Galtee Castle and Black Road approaches to the mountains.

On the western/ northwestern side of the Galtees, the villages of **Anglesborough**, **Galbally** and **Ballylanders** in Co. Limerick lie in rich farmland between the Galtees and the Ballyhouras,

providing key linking services between the two ranges. Each of the villages have vibrant communities, with excellent development programmes based on heritage, outdoor recreation and a number of looped walking trails. This 3-village hub has limited food facilities for both lunch and evening, as well as a limited accommodation base. Private sector facilities at Moor Abbey outside Galbally include *Tigh Roy*, which provides music, dancing, Irish language and wellness retreats, the international award-winning *Hillcrest Equestrian Centre*, which provides trekking, pre-hunting and pony trails, and the *Reads Camping* facility.

Moving to the north of the mountains into the beautiful *Glen of Aherlow*, to the villages of **Lisvarrinane**, **Rossadrehid** and **Bansha**, a sound recreational tourism base has been built up organically, providing walking trails, hiking, orienteering, angling, rock climbing, hill running and a full range of B&B, guest house/ restaurant, camping/ caravanning and hotel accommodation. The latter has declined in recent years due to economic pressures. The *Glen of Aherlow* has been designated as a Centre of Excellence for Walking, administered by Aherlow Fáilte in the Visitor Information Point on entry to the Glen. Both Lisvarrinane and Bansha are attractive villages, with Bansha offering accommodation, meals and services on the main Cahir- Limerick road. Rossadrehid is on the footslopes of the Galtees, with a small pub and shop at a cross-roads.

The following key points may be made about the necklace of Galtee villages:

- The population is largely agriculturally based, although significant numbers commute to larger towns and Cork, Limerick and Waterford to work.
- The *Glen of Aherlow* and *Ballyhoura Country* have strategically positioned themselves nationally in terms of rural recreational tourism in the north and northwest of the ranges; there is scope to expand this further to an international reach;
- Apart from the Mitchelstown Caves and Cahir Castle, there is not a strong tradition of tourism development and provision to the south and southeast of the mountains,
- The communities have highly active voluntary, parish-based community development councils, Muintir na Tíre, ICA and GAA clubs at local level. There will be a need to move to a more regional 'Galtees' vision.
- Country pursuits are highly popular locally and there are a number of equestrian facilities, gun & game conservation, shooting facilities and angling clubs in the district. Some could become part of the tourism product mix.
- A number of local residents are active walking members of the Galtee Mountains Walking Club and the Ballyhoura Bears Walking Club. There is a strong tradition of walking festivals which are gathering in number, variety and strength, and increasingly pitched to an international audience.
- The integral vernacular architecture and heritage aspects of the rural villages could be enhanced and 'packaged' as a touring option.

The 'necklace' communities are dispersed, often with weak knowledge of 'what is over the mountain', with natural rivalries for scarce resources. It is clear that developmental work will be required to build a single vision, identify projects and unified branding for the Galtee Mountains Initiative at community level.

1.4 Approach & Methodology

To carry out this work, SLR adopted an approach used successfully elsewhere, using two key means to determine local tourism potential and its economic impacts: (i) a top-down disaggregation of national/ regional data and (ii) a bottom-up estimate measured at the level of local businesses. Either method allows the key estimate of visitor volume to be made, in order to estimate revenue, employment and potential multiplier effects. The bottom-up method produces a more positive approach with local tourism entrepreneurs, and ideally should allow a better approximation of the actual value of local tourism, as well as 'real time' trends in the local market.

For this study, published 'top down' data specific to the Galtees is scarce, while acquiring reliable and consistent quantitative data from local businesses is challenging, given that individual service providers are generally reluctant to divulge details of business performance such as tourism revenue or turnover. Notably, though, Aherlow Fáilte commendably evaluate the economic impact of each of their events, which data were very informative in determining the potential of recreational tourism to be a significant local driver of enterprise.

Applying the more traditional 'top down' approach, relevant market research by Fáilte Ireland were compiled to define trends in the general market, which can be both to interpret local data trends and to design appropriate marketing & communications strategies in Phase 2.

Applying strongly the bottom-up approach, SLR interviewed a cross-section of tourist service providers and agencies on a 1:1 or telephonic basis. Additionally, statutory agencies (NPWS, Inland Fisheries, Coillte), local authority personnel from Limerick, Cork and Tipperary, regional tourism authorities (Fáilte Ireland SE, Fáilte Ireland SW, Shannon Development), Aherlow Fáilte, Ballyhoura Country, Mitchelstown Forum, Muintir na Tíre and strategic tourism operators were interviewed.

Available website data and brochures from Cahir, Kilfinane and Tipperary were gathered, to provide an overview of the accommodation base (B&B, guest houses, hotels, self-catering etc), restaurants, attractions, craft providers, events, activities etc. The recreational facilities were mapped, which have been compiled to a single digital platform (see Map A1 in Appendix 1).

The 'honeypot' attractions of Cahir Castle and Mitchelstown Caves represent significant tourist introductory 'gateway' opportunities on which the Galtees can build. The management of each facility had been interviewed previously to provide useful specific local market data.

A public meeting was held in Mitchelstown on 7 June 2011 to provide feedback to 25 stakeholders and to garner opinion on priorities for development. All of this was underpinned by the experience of the two consultants to define the tourism development approach best suited to the Galtee Mountains' product offering.

Through a strongly consultative approach, engaging with a range of stakeholders to define their needs & aspirations and by mapping of existing infrastructure and gaps, SLR has attempted to develop a sound base on which to define a vision, build a strategic plan, develop key products and local ownership to implement a successful development strategy over a phased timeframe by the Steering Group.

2.0 PLANNING FOR TOURISM

The following sections review the strategic policy framework for tourism development in Ireland and the relevant county-based plans for protection of environmentally sensitive landscapes, while encouraging appropriate tourism projects.

2.1 Overview of Tourism Trends

In October 2010, the EU stated clearly “...the European tourism industry faces a number of challenges into the longer term, including climate and demographic changes, pressure on biodiversity, the growing impact of information and communication technologies (ICTs) and increasing global competition, while the industry needs to recover from the effects of the global economic crisis.”

They went on to suggest how recovery may be achieved through three distinct measures:

1. promoting the development of *sustainable, responsible and high-quality tourism*;
2. consolidating the image and profile of Europe as a collection of sustainable and high-quality destinations; and,
3. maximising the potential of EU policies and existing financial instruments for developing the sector.

The influence of emerging markets such as China and India shifted the trading balance away from Europe from the high watermark of the mid-1990s of 60% of world tourism trade, to a projected 46% by 2020 (WTO, 2010). Europe and Ireland will have to fight harder in the coming decade to hold what it has in terms of numbers / expenditure.

Ireland's tourism development has been dramatic over the last two decades; however, the spatial spread of tourism and spend has been disappointing for the majority of rural destinations away from 'honey pot' destinations. In total **8.7 million visitors** visited the island of Ireland in **2008**, **spending €4.366bn**. This decreased to c. **6.5 million visitors in 2010**, with average spend per visitor of €502 (Tourism Ireland, 2010).

The good news is that the domestic recreational tourism demand is growing and provides an all-year-round demand unlike the international trends. However, it is predicted that it be more difficult to attract and retain new visitors (domestic or international) for new emerging rural destinations in the coming years.

2.1.1 Regional Tourism Development

Fáilte Ireland (FI) has responsibility both nationally and regionally for tourism development and welcome the potential emergence of the Galtees as a high quality 'inland mountain' destination. There are three regional agencies responsible for different parts of the Galtees (Fáilte Ireland SE – South Tipperary; Fáilte Ireland SW - Cork; and, Shannon Development - Limerick). The guiding principles underlining regional tourism development, and which will impact significantly on the development of the Galtees, are:

1. Work closely with public authorities, agencies and stakeholders to achieve objectives.
2. Principal strengths: people, the natural environment & sense of place
3. Focus on quality and economic value
4. Develop attractors for a defined market demand / fill a gap
5. Spread benefits around the region, with community support
6. Develop facilities that benefit residents and visitors alike

Activities engaged in by international visitors in 2009 include (*Tourism Ireland, 2010*).

- Culture & Heritage 46%

- Gardens 20%
- Hiking & Walking 13%
- Festival & Events 6%
- Cycling 2%
- Fishing 2%

Hiking, walking, festivals and angling are important activities for potential enhancement in the area, while other outdoor activities (kayaking, canoeing, hill running, climbing, mountain biking etc) are not disaggregated. How do recreational activities measure up to economic analysis?

- *Walking:* Over 800,000 overseas visitors claim to have gone hiking/cross-country walking in 2009. However, the number who walked off-road, for more than 5km on average, is 388,000 and they spent an estimated €183 million. Holidaymakers who stated that walking was an important factor in their choice of Ireland as a holiday destination number 366,000 and they spent an estimated €215 million while in Ireland in 2009.
- *Angling:* An estimated 132,000 overseas visitors engaged in angling while in Ireland in 2009, and spent an estimated €105 million.
- *Culture/ Historical Sites:* Over 3 million people visited cultural and historical sites in 2009 in Ireland, arriving by air primarily from Europe, UK and USA. Castles/ houses, museums & galleries and interpretative centres were the most popular attractions. There is a good year-round spread, with 33% arriving between October – March, with an average length of stay being a full week (7.2 days). No data is available for their specific spend, but overall visitors to Ireland spend in the region of €510 per head.

These activities form key markets for the Galtees tourism development and could generate considerable revenues with a coherent effort.

Domestic tourism will continue to be a source of growth area, providing the region offers and an attractive array of activities, events and festivals. However, local service provision must meet the highest of expectations.

2.2 Economic Context for Recreational Tourism

The Galtee Mountains are strategically located within 50km radius of Limerick (70,000 people) and Cork (500,000 people) and 70km of Waterford (50,000). Significantly, the mountains are located immediately adjacent to the M8 motorway, one of two highest-volume tourist traffic routes in the country, linking Dublin to Cork and Kerry. The area is now less c.2 hours drive from Dublin city centre, with a population base of 1.3 million. The mountains thus have the potential to attract a significant local/ regional, year-round visitor profile, as well as other domestic and international recreational tourists.

There are five registered¹ hill-walking clubs in Co. Tipperary, six in Co Waterford, three in Co. Limerick, as well as about 10 clubs in Cork city and county. Dublin has about 40 registered walking clubs, including company/ public sector/ college clubs, within 2 hours drive. These walkers are great sources of all-year-round visitors, with domestic hillwalking numbers across Ireland reckoned to be in excess of 50,000 and growing. These are huge markets which can be tapped by an excellent product which is well managed, marketed and sustained.

¹ <http://www.mountaineering.ie/nearestclub>

However, an expanded accommodation base and excellent supporting services, strong marketing and promotion will be required to attract and **retain** potential inflows. As well as that, strategic partnerships in the medium term with neighbouring mountain destinations (Knockmealdowns, Comeraghs) could provide year-round visitors.

Fáilte Ireland has set a target of 100,000 equestrian visitors to Ireland by 2012 in its development strategy for Irish equestrian tourism.

2.2.1 Ireland : Tourism Trends

The travel trends indicate that there is increased interest in recreational activity and cultural holidays and private tour guides. This is a positive trend for the Galtees activity and heritage products. Trends in the all-island Irish tourist market have been identified.

- Domestic 'short break'/ 'special 'offer breaks of up to three nights have increased as a result of the value offered by hotels and guesthouses in the past three years.
- Self tailored mini-breaks are just as popular as package holidays.
- There is decreasing interest in self catering apartments, package tours and camping and caravanning around Ireland.
- Twice as many people book online as use travel agents, particularly among the hiking/walking market.
- There is a trend towards educational specialist trip such as archaeology/ wildlife/ photography/ yoga retreats etc.
- The trend towards owning a country home means that urban dwellers are contributing to the rural economy with higher than average expenditure locally, sometimes purchasing quality artisanal products for the first home.
- Biking, angling and hiking/ walking represent significant growth opportunities for service providers/ operators in the Irish market. Despite a fall in markets in the post-2008 'crash' years, the long term trend appears to be positive.

Fáilte Ireland tracks the recreational activities of visitors to Ireland every year. Hiking/Walking, Angling and Culture & Heritage all feature highly as visitor attractions suited to the Galtee Mountains, as this product mix is readily available in the area of influence. Additionally:

- **Research highlights that of all outdoor activities pursued by visitors, walking is the most popular, as well as being the most important domestic recreational activity in Ireland** - up to 50,000² Irish people go walking/ hiking and the market is growing. In addition, walking provides visitors with an opportunity to enjoy a wide range of thematic experiences, including archaeological; historical; island; long distance; moorland; mountain; mythological; waterway; and woodland walks³.
- Statistics⁴ demonstrate the type of walking holiday sought by international walking tourists:
 - (i) The majority (71%) of overseas tourists who engage in walking/hiking travel either alone or as a party of two persons;
 - (ii) 34% of overseas tourists engage in walking travel alone (which compares with 24% of all overseas visitors travelling alone);
 - (iii) The majority (89%) of overseas walking tourists are unguided; and
 - (iv) Some 59% of international walking tourists walked more than 5km per day – the most popular distance walked.

² Source: Western Development Tourism Programme

³ Themes identified by Fáilte Ireland

⁴ Fáilte Ireland (2003) data, quoted in *Walking in the West* study commissioned by LEADER and Western Development Tourism Programme (2005)

- (v) The southeast region attracts only a small percentage of the total international walking market.
- In 2000, research⁵ indicated that along the Co Galway section of the Western Way, international package walkers spent an average of €63 per day, while independent international walking tourists spent between of €32 - €38 per day. Interestingly, international walking tourists sought comfortable accommodation and good quality food, versus the image of camping/hostel-based frugality.
- Landscape based tourism conservatively generates about €514 million of international tourism revenues annually in Ireland, directly attributable to walking, cycling and iconic landscape attractions⁶.
- Coillte Outdoors have estimated the economic value of recreation in their forest estate at approximately €15.9 million per annum (Coillte Recreational Policy, June 2010).
-

2.2.2 UK Tourism Trends

Tourism on a UK basis is enormously valuable and growing, despite a number of negative trends in the past decade ('9/11'; foot and mouth; terrorism threats etc). In 2002, the UK tourism industry was worth c. £76 billion, accounting for more than 4% of GDP, employing more than 7.5% (> 2 million) of the working population. This trend continued through the decade, albeit dampened by the recession.

Tourism within the UK is a major industry and in fact more valuable to the economy than international visitors⁷. The most popular activities for domestic UK holiday makers are: visiting heritage sites (29%); walking 2 miles or over (27%); swimming (22%); visiting artistic or heritage exhibits (22%) and watching performing arts (21%).

Although out of date, data provided by the Countryside Agency* for the **Hadrian's Wall National Trail** indicates an average spend of UK £39 by visitors spending more than one day (i.e. 'long distance' walkers) on the route in 2003. According to the report, in 2003 of the order of 3,720 long distance walkers took an average 6 days to walk the route. These walkers spent an estimated £852,000 in the region. The report also highlights that in 2003 a total of 215,316 day walking visitors spent an average of £7 each, generating over £2.4 million in expenditure.

It is estimated that, although long distance walkers comprised only 1.7% of total walking visitors, they contributed 35% of total walker expenditure along the route. This highlights the greater impact of long distance walkers in expenditure terms. The findings indicate that shorter distance walkers, however, contribute more to the local economy than long distance walkers.

*Quoted in *Walking in the West* study commissioned by LEADER & Western Development Tourism Programme (2005)

Enormous potential exists to expand the walking trails experience in the Galtees into international attractions. The figures above indicate that the mountains possess many of the key activities which appeal to the domestic and international UK visitor.

Galtees offers a product mix which can successfully benefit from these trends. Activity based holidays, with good integrated packaging and attendant services for the independent traveller, can prove to be a significant revenue generator for the locality.

⁵ National Waymarked Ways Advisory Committee (2000)

⁶ 'Gaining Ground' the Economic Value of Geoscience in Ireland (GSI, 2008)

⁷ The Tourism Network, 2002

2.3 Local Performance Data

There is a dearth of 'hard' relevant tourism performance data for the Galtees area. However, we can say that:

- Cahir Castle attracts 55,000 people per annum,
 - but this figure is down from 73,000 since 2006.
 - More than 2,500 dedicated schoolchildren per annum specifically attend the Castle on curriculum related studies.
- Mitchelstown Caves attracts 10,000 pa, many from the educational market and young immigrant 'new Irish' communities. The M8 motorway opening has been very positive for them in bringing in inter-regional visitors. The recent Queen's visit to Cashel in May 2010 saw an almost immediate pick-up in UK visitors to the Caves.
- Approximately 3,000 angling licences are sold per annum in SE region – ability to attract more with re-opening of salmon fishery in September 2010
- Potential exists to link angling to other activities for non-fishing partners/ friends – golf, walking/hiking, cycling, biking, heritage, music, etc., building a fully integrated destination to meet the needs of range of visitors.

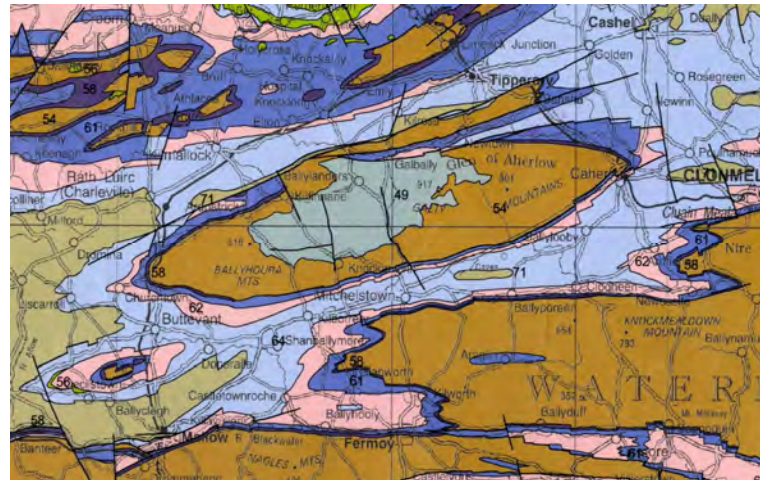


3.0 GALTEES: PLANNING & ENVIRONMENTAL FRAMEWORK

3.1 Geological Character

The Galtee Mountains encompass a distinctive geographical unit straddling counties Tipperary, Limerick and Cork, linking from west to east, the Ballyhoura Mountains, Glen of Aherlow, Slievenamuck, Galtee Mountains and the Suir Valley.

The Galtee Mountains are formed by anticlinal 'up-folds' of Lower Palaeozoic-aged rocks, primarily cored dark grey shales (49 *grey green*) and sandstones of the Old Red Sandstone (54 *brown*) and fringed by the Lower Limestone Shales (61 *dark blue*). The valleys between the Knockmealdowns and Galtees are formed of Carboniferous limestones (62 *pink* and 64 *pale blue*), with younger shales and siltstones to the southwest (71 *pale brown*). This structure provides the pleasing and cohesive landscapes of geological contiguity at the triple-point of counties Limerick/Cork/ Tipperary.



Map 1: Geology of the Galtee, Slievenamuck & Ballyhoura Mountains

3.2 Environmental Designations

In 2006, the baseline study had reviewed the County Development Plans (CDPs) of the three relevant county councils, South Tipperary County Council (STCC), Limerick County Council (LCC) and Cork County Council (CCC) respectively. Each council has recently undergone the next stage of 5-year planning and have commendably committed to protection of environmentally designated areas (Special Areas of Conservation/ Natural Heritage Areas etc), of high amenity value in each of their CDPs. The National Parks & Wildlife Service, in consultation with the Councils and Inland Fisheries authorities, have designated a number of areas as candidate Special Areas of Conservation (cSACs) under EU and national legislation conferring very significant protective measures (see Maps 2, 3).

The Galtee Mountains in counties Limerick and South Tipperary have been designated as a cSAC on the basis of assemblages and habitats including European dry heaths, alpine and boreal heaths, with particular reference to Red Data Book-listed, rare arctic-alpine flora, including

orchids, found on the cliffs of the corries on the north slopes of the mountains. Additionally, the peregrine falcon, an Annex 1 species of the Birds Directive breeds on the mountains (See below the site synopsis for the Galtee Mountains SAC, prepared by the NPWS, 1997).

SITE NAME: GALTEE MOUNTAINS

SITE CODE: 000646

Situated in east Limerick and south Tipperary, the Galtee Mountains are Ireland's highest range of inland mountains. Galtymore has an elevation of 920 m and the main ridge, mostly above 700 m, extends approximately 10 km from east to west. The underlying geology comprises sandstones and shales.

Heath is the main habitat type within the site and Heather (*Calluna vulgaris*) dominates the vegetation. Areas of both dry heath and alpine heath are found. Upland Mat-grass (*Nardus stricta*) grassland occurs on steep slopes, particularly in the west. Blanket bog is more localised and occurs mainly at high altitudes. Erosion is severe on many ridges and cols where deep peat deposits (up to 2 m) have accumulated.

The north-facing cliffs are of primary importance as they support arctic-alpine communities with some rare plant species. Other typical mountain plants found on the site include Dwarf Willow (*Salix herbacea*), Viviparous Fescue (*Festuca vivipara*), Stiff Sedge (*Carex bigelowii*), Fir Clubmoss (*Huperzia selago*) and Crowberry (*Empetrum nigrum*).

The Rare Small-white orchid (*Pseudorchis albida*), Mountain Rock-cress (*Cardaminopsis petraea*) and Alpine Saw-wort (*Saussurea alpina*) have been recorded from the site. These species are included in the Red Data Book and the former are legally protected under the Flora Protection Order (1987).

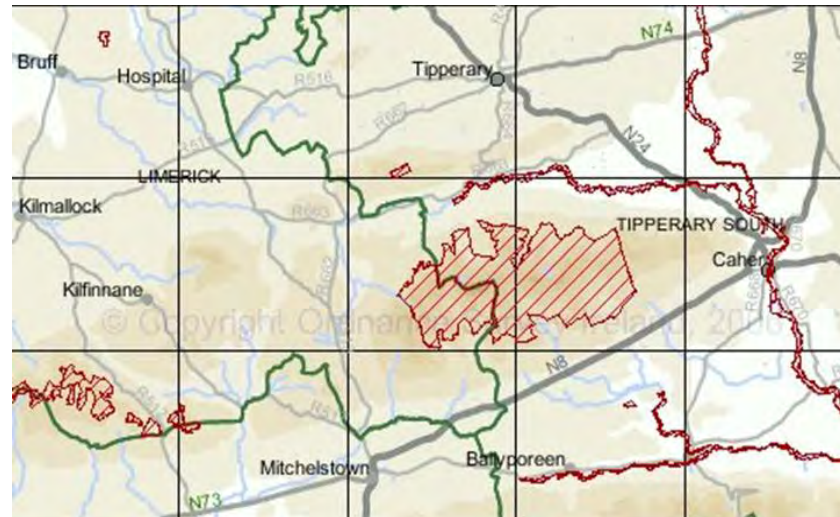
The site supports breeding Peregrine, a species listed on Annex I of the EU Birds Directive.

Overgrazing by sheep and frequent burning are causing potentially serious damage to some areas of heath and grassland. Afforestation threatens the lower slopes and valleys.

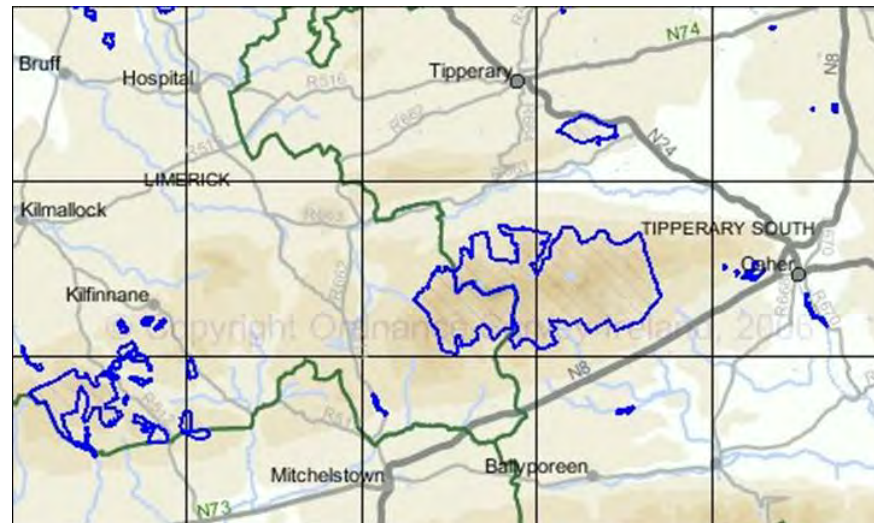
Correspondence with the National Parks and Wildlife Service (of the Department of Arts, Heritage & Gaeltacht) indicates that a number of activities are specifically prohibited within the boundaries of the designated areas, while others are regarded as 'Activities Requiring Consent (ARC)'. Farmland included within the site must be farmed in a manner consistent with conservation of the site. Designations have no effect on land ownership, and do not confer automatic access rights to the farmland by the public.

Activities requiring consent (ARCs) include: use of excavators/ bulldozers; cutting / removal of plants or felling of trees; removal of geological rock or fossil specimens; digging/ ploughing or harrowing; application of inorganic fertilisers; burning/ topping or clearance of scrub; application of pesticides/ herbicides; significant changes in livestock densities; drainage works; planting of multi-annual energy crops; **developing or allowing the development or operation of recreation/ visitor facilities or activities, at a commercial scale (ARC-31); off-road recreational use of mechanically propelled vehicles (ARC-32); use or permitting the use of land for car-parking (ARC-33); alteration or renovation or removal of buildings (ARC-34)**, among others.

These may have significance for specific activity proposals in the higher Galtee ranges, particularly for concepts such as rock-climbing walls; or development of bothy-style hostel accommodation at a commercial scale etc.



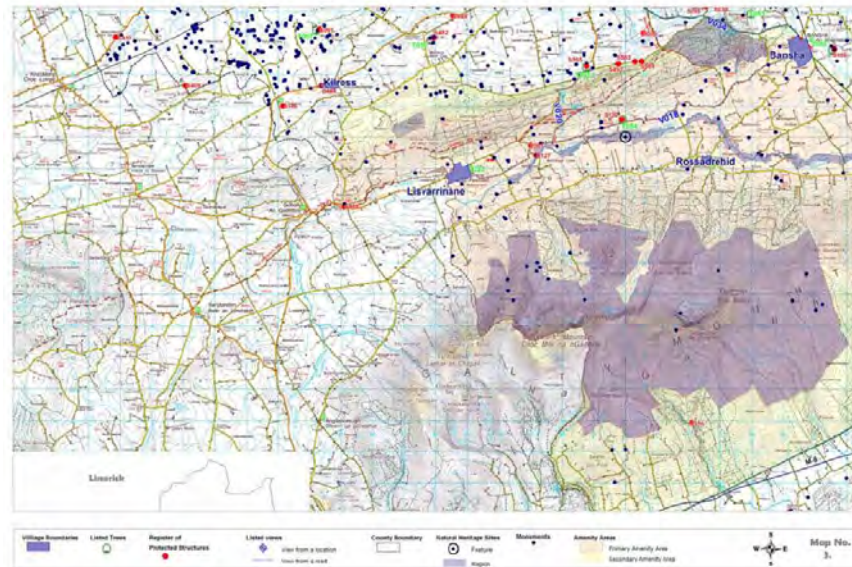
Map 2: Candidate Special Areas of Conservation (cSACs), Galtee Mountains, Tipperary & Limerick
Note that rivers Aherlow, Suir, Tar and Duag are also accorded SAC status (NPWS)



Map 3: Natural Heritage Areas (NHAs and proposed), Galtee Mountains, Cos Tipperary & Limerick
Note that sections of the Ballyhoura Hills, Slievenamuck and rivers are also designated (NPWS)

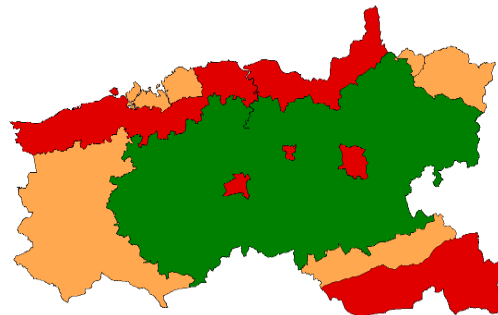
In discussions with members of each council, the team was struck by the high priority accorded to the environmental integrity of the Galtees and also the similarities of approach taken by each council to landscape character assessment (Maps 4, 5 below), rural heritage, and the need for appropriate developments to stimulate rural enterprise. Each council has also highlighted sustainable tourist development as a priority.

Similarly, the Landscape Character Assessments (LCA) which have been undertaken by each Council has identified areas of 'high scenic amenity' to be protected from inappropriate development (see Maps 6 for examples from Tipperary and Limerick).



Map 4. High Amenity Areas: Galtee Uplands, Co Tipperary (courtesy South Tipp County Council)

In primary amenity areas (specially sensitive) it is considered that landscape values are too high to absorb more than limited change, while in secondary amenity areas (highly sensitive) the landscape is capable of absorbing change that reflects and enhances the current landscape condition. The CDPs specifically provide for both primary and secondary amenity zones, with the bulk of the Galtee Mountain uplands incorporated in the higher amenity category. Notably, the areas under commercial forestry, on the eastern end of the ranges and selected valleys, mainly owned by Coillte, are not so designated.



Map 5. High Amenity Areas: County Limerick, shown in red (courtesy Limerick County Council)

In relation to any proposed developments, the councils will balance the need to protect the landscape character against the requirement for appropriate socio-economic development of an area. Outdoor recreational facilities which are likely to fall within the amenity areas must take these designations into consideration, maintaining the lowest impact possible.

3.3 Galtee Mountains Conservation Plan (2005-2010) NPWS

The NPWS prepared a Conservation Plan (2005 - 2010) for the protection and conservation of the Galtee Mountains candidate SAC (Site Code 646) in 2005. The plan has been implemented over the past five years, despite resource constraints within the NPWS.

The Plan highlights some of the key challenges for the conservation of the cSAC, including unsupervised burning of scrub to encourage better grazing for livestock, thus damaging the protected heath. Livestock densities can create problems locally, with occasional incursions of fallow deer onto the protected sites.

Recreational activity, particularly hill-walking along the Lyracappul-Galtymore ridge, has caused peat erosion parallel to the mountain wall. Motorised vehicles are becoming increasingly a concern, specifically quads, 4WD and motorbikes along the main ridge. Letter is locally a problem where materials are thrown down rock crevices.

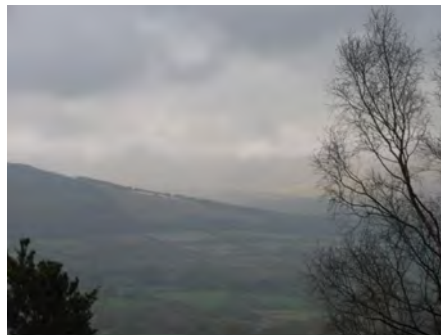
Erosion channels have developed on upland peat, much of which is reduced from its former state as an active blanket bog.

Plant species such as bracken and also rhododendron threaten the habitats on the southern slopes, although much is removed by burning by farmers, encouraging higher encroachment.

Water abstraction from two locations for the Galtee Regional Water Supply Scheme (Lake Muskry and College Stream respectively) removes 3,285,000m³ of water annually from the mountains.

The NPWS proposed to implement the management plan to mitigate against these threats through: monitoring of activities, liaison with landowners, implementation of REPS schemes and farm plans, as well as enforcement of the Habitats/ Birds/ Water Directives and Wildlife Acts. Consent must be obtained for certain 'notifiable actions' from the Minister.

Four core objectives were set, with key strategies identified to implement each. The NPWS very much supports the partnership model through linking with farmers and other stakeholders through its Liaison Committee. It is recommended that the Galtee Mountain Tourism strategy should also ally with this Committee to establish good practice at the outset and to avoid any conflict with landowners.



4.0 REVIEW OF EXISTING FACILITIES/ INFRASTRUCTURE

In parallel to stakeholder consultations, SLR undertook an overview of the existing tourism recreational infrastructure to identify gaps and potential opportunities. Thus, the recreational tourism base and primary services of the Galtee Mountains were mapped: long distance and looped walking trails, cycle tracks, mountains biking, angling, canoeing, kayaking, rock-climbing and hill-running were identified where possible, with hubs of supporting accommodation, food and information points in the surrounding villages and 4 'portal' towns.

4.1 Access

Recreational access to the uplands of the Galtee and Ballyhoura Mountains has traditionally been on a basis of informal permissive access by landowners. The Galtee uplands are largely owned by Coillte, the Irish semi-state body for commercial timber production in the eastern ranges, while the open mountain is largely privately owned by local farming families. To date there have been no problems with access for walking and hiking, although some flashpoints have been recorded with scramblers and 4WD quads. Both landowners and Coillte are willing to allow recreational access, with certain provisos relating to environmental sustainability and low impact nature of activities. Importantly, Coillte is committed to partnership working in the sustainable development of recreation in its estate (*Coillte Recreational Policy 8, June 2010*) and to the use of volunteers where appropriate (*Coillte Recreational Policy 9, June 2010*). The National Parks & Wildlife Service (NPWS) have concerns regarding the protection of cSACs and pNHA environmental designations and are willing to work in partnership with local stakeholders to achieve maximum protection.

In the lowlands, community groups, walking groups and the Rural Recreation Officers of both counties Limerick and Tipperary have been negotiating access for waymarked looped walks with great success. There is excellent permissive recreational access, which is well managed in full consultation with the landowners. Some landowners are co-operating with the national *Walks Scheme* advised by the RROs on the ground.

4.2 Recreational Amenities

4.2.1 Walking Trails

The Galtees are Ireland's highest inland mountain range, with a variety of peaks including Galtymore at 3,018 feet (919m). There are five glacially-scoured, corrie lakes on the range, accessible only on foot, to add to the attractiveness of the range for walking. There is an excellent array of both linear and looped walking trails particularly on the north and northwest side of the Galtees, traversing both upland and lowland areas.

Linear/ Long-Distance Trails

Two long-distance linear trails traverse the area:

- The east-northeast *Ballyhoura Way*, which coincides with the *Beara to Breifne Greenway* and passes from Kilfinnane to Ballylanders, Galbally, Lisvarrinane, Glen of Aherlow to Tipperary Town.
- the north-south *Tipperary Heritage Way* (passes the east end of the Galtees) from Ardfinnane to Cahir and onwards along the Suir Valley where it heads towards Cashel.

There is currently poor availability of walking maps showing these longer routes for the general walker. There is some promotion of the walks on storyboards in Cahir, Kilfinane, Galbally and Tipperary Town. Long-distance route maps are not available in tourist information points in Aherlow, Tipperary or Cahir. There is a slight disconnect between the walking trails and the local villages – services are not geared either in output/ produce or in timing for walkers' needs.

The waymarked ways in general stay below the 500m contour due to safety considerations in the event of poor weather. However, in terms of challenge, most elite walkers/ walking clubs will want to climb the mountains peaks, but apart from a number of informal routes to Galtymore which are poorly signed (e.g. Black Road on the southeast; Clydagh Bridge on the north side), there are no formally marked approaches to the high Galtees.

Looped/ Short-Distance Trails

An excellent array of up to 20 looped trails (Table 1) have been emplaced along the north slopes of the Galtees and in the foothills of the Ballyhouras, of varying length, grade and challenge.

Table 1: List of Looped Walks in the Galtee Mountain Catchment

Northern Galtees (managed mainly by Aherlow Failte, Coillte, walking groups, with partners)	Glencush Lough Curra Lake Muskry	Darby's Bed Moor Abbey
Western/ Northwestern Galtees (managed mainly by Ballyhoura Country, Aherlow Failte, with partners)	Coopers Wood Soldiers Road Attychrann Paradise Hill Benard Darragh Hill Molanna Keale River Black Rock	Bosnetstown Slieve Reagh Cush Earthworks Barranahown Pinnacle Glenbrohane
Coillte Forest tracks	Glengarra Woods Lissava Galty Castle	Bansha Gortavoher Ballydavid

These trails have the potential to attract a diverse range of walkers, from beginners to medium level. The looped trails were compiled to a single map platform and are shown on Map A1 in Appendix 1. The looped trails are of varying length and grades, but are attractive to moderately fit walkers and beginners. The starts/finishes are linked to the local villages, potentially offering services at beginning and end of walk. However, services are limited in the local villages, mainly in food provision or 'pub' lunch type menus.

There are no 'hard' figures of the total numbers of people walking in the Galtees each year, but the numbers are anecdotally very significant – the challenge therefore is not so much to attract walking/ hiking visitors but to retain them.

Centre of Excellence

The Glen of Aherlow was designated as a *Centre of Excellence for Walking* by Fáilte Ireland, based on the highly attractive scenery, range of walks and good supporting infrastructure. It is administered by Aherlow Failte www.aherlow.com from the Visitor Information Point at the rear of the Coach Inn in the heart of the Glen. The centre offers looped walks, guided mountain walks, forest trails, and lake walks to the corries on the north side of the Galtees. The 'Ballyhoura Country' agency www.ballyhouracountry.ie supports all outdoor activities, including a huge variety of walking products and the Centre of Excellence for Mountain Biking, a new designation for the 90km trail rides.

Walking Clubs

There are a two highly active walking clubs located in the catchment of the Galtees, namely the Galtee Mountains Walking Club www.galteewalkingclub.ie and the Ballyhoura Bears www.ballyhourabears.com. Each has an active membership of walkers and organisational volunteers, who care deeply about the mountains. The clubs organise weekend walks throughout

the year, offering graded walks, suited to all ages and experience. Each club also offers evening walks on Wednesday (Aherlow) and Thursday (Ballyhoura) through the summer months. The walking centres and clubs work extremely well with Aherlow Fáilte and Ballyhoura Country and the interaction and support is admirable for festival delivery.

Additionally there are a number of climbing clubs from Limerick and Cork who use the cliffs on the north side of the mountains for challenging ascents.

Walking Festivals

There are a number of walking festivals held in Galtees throughout the year, hosted variably by Aherlow Fáilte and Ballyhoura Country, with support from landowners, Coillte and local communities. Aherlow coordinates two successful walking festivals annually, one in January and the other on the June Bank Holiday.

The Ballyhoura Bears organise an annual Ballyhoura International Walking Festival on the May Bank Holiday, spread over three days of the weekend. The key feature of the weekend is the Marathon challenge, which attracts over 70 competitors. .

By way of illustration of the value of these festivals in rural areas, the winter walking festival held in the Glen of Aherlow in January 2011 attracted 600 people and generated 400 bed-nights (Aherlow Fáilte data, 2011). The most recent summer festival on the June Bank Holiday (2011) saw a 25% increase on last year's attendance, highlighting the potential of well-organised walking-fests to attract visitors all year round.

However, there is a limit to accommodation services especially high-quality, Fáilte Ireland approved B&B/ guesthouses to cope with festival numbers. There are excellent camping facilities in Aherlow and Galbally. The Aherlow House Hotel caters for walkers specifically, while the Kincoran Lodge Hotel is attempting to expand its base for outdoor enthusiasts on the south side of the range near Glengarra. Cahir House Hotel and the Firgrove Hotel in Mitchelstown are not specifically geared to outdoor recreational events or festivals.

4.2.2 Mountain Biking

In 2010, the Ballyhoura Mountain Bike Trail (<http://www.ballyhouramtb.com>), offering c. 90km of continuous upland biking paths, recorded 25,000 visitors, a high achievement given that the facility is just about 2 years old. It has aggressively marketed itself as Ireland's biking adventure destination and has led to a number of start-up recreational biking businesses in the Kilfinane area. There is significant scope to retain more day visitors with extensions and links to the higher Galtee ranges. However, this option may not be open to the Galtees given Coillte's strategic national policy of not permitting bike tracks in all areas of their mountain estate (as it would detract from existing facilities and prove to be unsustainable if too many exist). The capital and operational expenditures (upwards of €2 million) are challenging in this economic climate.



However, during consultations, there were a number of suggestions to develop a '**downhill biking facility**' in the eastern ranges of the Galtees, in the Lissava area near Cahir, to provide an extension of the Ballyhoura experience to the east. It seems that downhill biking happens in an informal way anyhow and that there may be scope to facilitate the activity with Coillte permission. This idea would need to be scoped very thoroughly prior to any further action.

Mountain bikes can be hired in Ballyhoura Hills area within the Galtees catchment, where two facilities service the biking community (Trailriders at Ardpatrick and Ballyhoura Bike Hire at

Kilmallock). Rates vary from €30-35/day to hire a fully equipped mountain bike with special offers for schools groups/ adventure groups/ summer specials etc. It is interesting to note that both of these facilities have developed on the back of the opening of the mountain biking trails, an excellent example of integrated enterprise development.

4.2.3 Cycling

The three county councils have implemented a network of rural cycling routes through the back roads of Limerick, Cork and Tipperary. The routes are signed but are prone to ambiguity where signed are turned/ blown in the wind. Traffic may also be a problem, with high speeds even on rural roads.

Cycles can be hired on daily, weekend, weekly rates at the two specialist shops mentioned in 5.3 above.

4.2.4 Angling

A number of excellent game fishing rivers flow through the area (Aherlow, Glengarra, Suir, Geevagh) many of which are subject to an SAC conservation designation, reflecting their high natural heritage status for trout and salmon. The salmon fishery in particular has the potential to attract a significant number of high-spending fishermen to the area. There are a number of active angling clubs including Cahir.

Inland Fisheries of Ireland (IFI) confirmed that the River Suir is open for fishing in 2011, but only to a limited extent due to the limited surplus salmon stocks available. Thus this fishery was re-opened on a 'catch-and-release' basis only from the start of the season (17th March 2011), but may open to 'catch-and-keep' for a limited extent on what is known as a 'brown tag fishery', one fish per angler, for two weeks each year, which allows a limited catch of salmon.

Centre of Excellence

In 2010, Cahir was designated as a European Centre of Excellence for Brown Trout (CoE) by Fáilte Ireland, a significant boost to the traditional angling tourism base. To gain this status, the Centre must have availability of the fish themselves but also 'infrastructure' such as good access to the river, accommodation, a variety of places to eat etc. As part of the 'easy access' requirement, there are six fishing 'stands' along the river, easily reached from car-parks, and all have wheelchair access – see <http://www.visitcahir.ie/ThingsToDo/ThingsToDoFishing.html>.



Swiss Cottage –one of angling stands for wheelchair users

The CoE is being driven by local volunteers, primarily members of the Cahir and District Anglers' Association. Momentum and capacity building are being undertaken to build ownership and knowledge of the angling product among general and specialist service providers, including B&Bs. Guides are being trained on access, rods, gillieing etc – already, four guides have been trained as 'gillies' to guide visitors to the best fishing stretches of the rivers, at a cost of €80/day. The daily salmon licence is €21, which for a total of c.€100 gives the visitor a full package. Promotional activities at specialist trade fairs are being undertaken with Fáilte Ireland, and the Valley enjoys

guests from Dutch, Belgian and French markets, with a reduction in the traditional British market, and almost no Germans. FÁS are providing courses in website design and maintenance, which the CoE is utilising.

The **River Suir** provides a nearly perfect environment for the survival and growth of wild brown trout. It is the second longest river in Ireland at 185km, ranging from 25-35m wide, which with its tributaries, drains a total catchment area of 3,610 sq km. Very few rivers can equal it in terms of the overall numbers of trout that it produces, available to the angler. The average size of trout ranges from 0.35–0.9kg (¾ to 2 lb) in different areas, depending on the habitat. Their lifespan is relatively short and few trout exceed 4 years of age. There are also very good runs of salmon depending on water levels and conditions.

The fishing in the area is controlled by the *Cahir and District Anglers' Association*. This is one of the oldest (over 80 years) and finest clubs in Ireland. email: mokey.guirey@gmail.com. **Angling guides** are available with vast experience of the river and its tributaries. Contact Kevin Rowe, Information Officer, Cahir and District Anglers' Association, Tel: 052 7442729 Mobile: 087 6409271 /087 6409271

Inland Fisheries Ireland is keen to support any angling development, provided that the conservation of fish stocks is respected within the overall licensing system. It considers that there is huge potential to deliver more recreation through angling and upland adventure. IFI recognises that the angling clubs are critical to the monitoring and regulation of rivers, acting as voluntary 'eyes and ears' for the authorities. The ethos of conservation and responsibility for fisheries by voluntary clubs is admirable and should be encouraged and fostered in the implementation of any tourism development plan.

4.2.5 Equestrian Pursuits

At least three AIRE approved equestrian centres are located in the Galtees catchment at Hillcrest Equestrian Centre near Galbally; Cahir Equestrian Centre and Burncourt Equestrian Centre, respectively.



Trekking to the Galtee Lakes

The existing equestrian centres offer dressage, show-jumping, cross-country and pre-hunting tuition. The forest tracks of the Galtees offer hacking for the leisure rider, safe hacking for children on ponies, as well as schooling hunters.

Access to the forest tracks on the mountains is negotiated with Coillte, under licence for an annual fee. Insurance is expensive but not prohibitive for the service providers.

Horses can be hired for guided 3-day treks and short term holidays. Week-long treks had been offered by one service provider, but it was too resource intensive so a 12-person, 3-day package is currently offered, with accommodation provided by other service providers in Bansha and Kilmallock (www.hillcrestequestrian.com). Also, Easter camps for up to 40 children (11y +) are on offer.

The pony-club offering was very popular but there has been a drop-off in demand following the economic recession since 2010. Additionally, there is a strong Galtee Harriers club in Mitchelstown, which takes part in hunting and eventing.

While new infrastructure, pathways and other developments would be a welcome addition to the Galtees, all users of the mountain must be facilitated and allowed to co-exist into the future.

Ireland could capitalise on its deep heritage as the "Land of the Horse" to create an important opportunity for tourism growth, with particular potential for rural areas and out-of-season visitors.

- There is an opportunity to package a '*Galtees Hunting/ Rural Pursuit Weekend*', which could include local accommodation, hunting/shooting, musical entertainment, local food and perhaps a cultural tour. As hunting is mainly a winter sport, this could boost visitor numbers and occupy bed spaces in the quiet season. Visits to the races, festivals, horse sales or top studs in south Tipperary could also be incorporated.
- *Trekking opportunities in the Galtees.* A significant industry has been developed in the UK around walkways and bridlepaths for horse riders. '*Horses Welcome*' is a scheme set up by the British Horse Society (BHS) Scotland as a self-financing marketing tool for those providing overnight stays for horse and rider. More than 650 miles of signed and mapped riding routes have been opened in Scotland and the Horses Welcome scheme allows business owners along these routes to offer accommodation and other services to riders staying away from home to enjoy the trails. It is believed that horseback riders spend approximately €40 per person per day in local shops, pubs and guesthouses while on holiday.
- *TREC* is a relatively new equestrian sport to Ireland that can be simply described as orienteering on horseback. Riders follow a certain route (12-45km) at given speeds, with checkpoints along the route, while they also complete various obstacles. The foothills and higher slopes of the Galtees may be suitable for the sport, subject to due regard for other recreational interests and nesting/ roosting seasons of birds.
- In the past, *horse drawn caravans* were available for hire to visitors who would take a horse and cart for day or multi-day trips. This business model has been successfully revived in a number of counties in Ireland and could be examined in the Galtees area.
- *Toll Rides*, similar to that operated on the Grey Abbey Estate in Co Down, could be examined. Open from March to October, riders pay an annual fee (€41) for use of 6.5km of specially constructed trackway for horses and riders.

Caitriona Murphy – Freelance Journalist/ Equestrian Interest 2010

Such opportunity models could be examined in the context of an integrated tourism strategy for the Galtee Mountains.

4.2.6 Para-Gliding

Para-gliding is a minority adventure sport, with scope in the Teampallan/ Temple Hill or Jacob's Ladder areas of the Galtees, which offer favourable updraft on its northern slopes akin to the best on offer in Slievenamon and the Comeraghs. However, landing spots need to be negotiated and this is not always easy especially during lambing season etc. Additionally, this activity may have cause to disrupt roosting or incubating wild fowl, and would equally require negotiation with landowners and other users of the mountains through a partnership model.

4.2.7 Kayaking/ Canoeing

Kayaking is a minority adventure sport which it seems may be well suited to runs long the eastern end of the Aherlow River from College Bridge (Rossadrehid) to Ballymorris near its confluence with the Suir. As with all water-based sporting activities, the insurance premiums are high, which may be prohibitive, especially at the start-up stages of a business, but membership of a national / UK association may help to reduce these risks.

A suggestion was made during consultations to develop white water rafting in the Attychrann River in the Galty Castle amenity area (*this may be unsuitable but is worth scoping*).

4.2.8 Orienteering / Hill Running

Orienteering and hill-running are low impact, terrain-running activities, sports which are growing among those seeking challenging physical and mental activity. They are suited to elite runners, but also to children and active aged. There are a number of clubs based in Limerick, Cork and Waterford, as well as Dublin, which have active programmes from Autumn through to Spring nationwide. These groups form an excellent target market for the Galtees destination.

There is great scope to emplace a short, permanent orienteering course, somewhere in the mountains. The Glengarra Woods area would form an excellent base, with its parking facilities and youth hostel; and the consultants are aware that this area has been mapped some years ago for orienteering purposes. It may require specialist mapping updates in association with the Irish Orienteering Association (www.orienteering.ie).



4.2.9 Game Shooting

There are a number of active gun clubs in the Galtees catchment which, as well as enjoying controlled shooting, have a very strong ethos of game stewardship and conservation measures. There have been bad experiences of non-club members coming into the mountains in the past and over-shooting game species. The sport does not readily lend itself to 'tourism' as land access is granted on a goodwill nature and is highly unlikely to survive commercial tourism shooting. Additionally, the clubs have made stringent efforts to conserve game species of birds, which can be divided to two groups: replaceable 'captive bred' birds (pheasant, mallard) and those that cannot be replaced easily (snipe, grouse, woodcock and various migratory species of duck). The clubs are opposed to commercial exploitation in any form of the second group, as this would threaten their numbers and conservation status.

Regarding potentially conflicting uses of the mountains, the local clubs are concerned by increased numbers of walkers on open mountains during the incubation periods of red grouse (April/May) and first flight of young grouse periods (June/July). If the birds are disturbed and so dispersed, this leaves the family group more vulnerable to predation.

These points may be dealt with reasonably by responsible interaction among the stakeholders through a partnership model.

4.2.10 Mountain scrambling

Mountain scrambling is a minority activity, which is often resented by other mountain users. It is considered to be high energy and very appealing to young men. On the down side, it is potentially disruptive of wildlife and the general quietude of the mountains.

In consultation, there was a suggestion to have a dedicated track(s) for scrambling to keep it away from other users. However, this is unlikely to be widely supported based on our feedback, particularly in the context of the protected and environmentally sensitive SACs on the higher Galtee mountains. On the other hand, it could provide a USP (unique selling point) for the Galtees to have Ireland's first dedicated scrambler trail in the lower ranges/ non-SAC zones.





4.2.11 Golf

The Cahir Park Golf Club www.cahirparkgolfclub.com offers an 18-hole, par 71 golf course set in the Cahir Estate Parklands straddling the River Suir, and is open to visitors all year around. Some of the accommodation providers in the Cahir area will offer golf packages to small groups who wish to play golf in the area. There are a number of other golf courses in the region in Clonmel, Tipperary, Slievenamon etc. offering plenty of variety for the keen golfer.

4.3 Challenges: Physical Environment

Increased popularity of outdoor recreation has caused challenges for the sustainable development and management of the Galtee Mountains area (Table 2):

Table 2: Challenges: Physical Environment

Activity	Challenges Faced	Photographs of Galtees
Erosion	<p>Overuse of the most popular paths may lead to erosion of peat and cause slope instability. e.g. Lyracappul-Galtymore wall peat erosion.</p> <p><i>A Management Plan will be required to ensure that increased numbers of walkers will not impact detrimentally on the integrity of the mountain. This would include provision of improved parking, signage, toilets, litter management etc, as well as water management & erosion prevention measures on most popular tracks.</i></p>	
Litter	<p>At beauty spots, littering by general carelessness and fly-tipping (e.g. at parking spot at head of the Black Road).</p> <p><i>Could be managed through volunteer corps of Galtee Mountains Partnership, with public partners at the helm.</i></p>	
Quad Bikes/ 4WD vehicles/ Scramblers	<p>Severe broadening and consequent erosion of tracks</p> <p>Noise pollution for other mountain users</p> <p>Disruption of nesting/ roosting birds, an issue of key concern to the local Game & Conservation Clubs.</p> <p><i>Could be policed by volunteer corps working with NPWS, but drives the problem elsewhere. Could be potential for dedicated tracks, but unlikely to be well received.</i></p>	
Environmental Designations	<p>The Galtees enjoy environmental protection as candidate sites for SAC/ NHA and SPA designations under environmental law, as the mountains contain a number of varied habitats (heath, lakes, alpine/arctic, blanket peat) and are home to species of birds which are 'red-listed' under the Birds Directive (e.g. Peregrine).</p> <p><i>This will prohibit the development of certain 'hard' infrastructure in designated zones.</i></p>	

Activity	Challenges Faced	Photographs of Galtees
Signage	<p>The Galtees are currently poorly signed off the M8 Dublin-Cork motorway, the main tourist access route to the southwest. Ironically, there is good signage for Mitchelstown Caves off M8 (6 signs between Cahir and Mitchelstown).</p> <p>Mixed levels of signage on regional and link roads to the trailheads/ access points; the northern entry is poorly signed from Tipp Town to 'Galtees' although there is signage for Glen of Aherlow; likewise from Mitchelstown/ Galbally, weak signage for Galtees.</p> <p>Very poor signage to King's Yard / Galty Castle and the Black Road on the south side of mountains for access to Galtymore, until actually at the turn in Skeheenarinky.</p> <p>Moderate signage in Aherlow to trail heads at Clydagh/ Lake Muskry; also Slievenamuck walking trails good; also Kilfinane & Galbally.</p> <p><i>Integrated Signage Plan required with 3 x County Councils & NRA</i></p>	
Parking	<ul style="list-style-type: none"> Very poor parking infrastructure around the Galtees range. Good Coillte parking at designated points such as Glengarra, but poor at Clydagh bridge entry. (e.g. Black Road parking very limited for events/ busy weekends) <p><i>Integrated Parking Plan for designated sites among 3 x Co Councils.</i></p>	
Transport	<p>Weak public transport to mountainous areas of south Tipperary/ Limerick & Cork.</p> <p>Car dependant access, except during festivals when buses are organized for participants from walking centres.</p> <p><i>Difficult to overcome given economics of rural dispersed communities.</i></p>	

Each of these issues can best be managed by the local authorities in collaboration with local stakeholders in a partnership model, according to a Strategic Plan.

4.4 Cultural Heritage

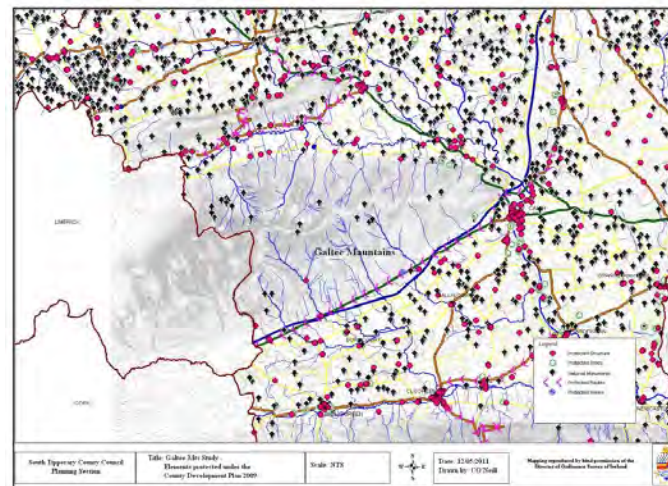
The Galtee Mountains possess a large array of cultural monuments and features many of which are protected under legislation.

A number of national monuments are present in the plains immediately surrounding the Galtees, as well as more than 20 in high Galtees. A number of protected structures (mainly buildings of cultural value) also exist in the foothills.

A rich array of historical and cultural heritage exists, given the strategic location along ancient territorial boundaries (see Map 6 for example in one county, South Tipperary).

The villages surrounding the Galtees are generally very pleasing aesthetically, thanks to the enormous work of community groups and village enhancement schemes over the past two decades. Many individual heritage features have been restored with pride and provide points of interest for the visitor.

The portal towns of Cahir and Mitchelstown are both very attractive as heritage towns, Cahir linked to its Castle; Mitchelstown a wonderful example of planned architecture. The ongoing enhancement of both towns should be a signature part of the initiative. Kilfinane is a fine example architecturally of a rural market town, with a central shopping and cultural centre that has been sympathetically restored over the past 20 years. Tipperary Town was once a garrison town, with a fine commercial centre and a tourism information centre at Excel, with a good network of signed pedestrian historical trails through the town. All of the towns are suffering a decline in commercial activity in the past three years; the provision of targeted services to a vibrant, integrated recreational destination centred on the Galtees may help to reverse fortunes.



Map 6. Protected Elements, Galtee Mountains, Co Tipperary
Courtesy: Planning Department of South Tipperary County Council

4.4.1 Cultural & Natural 'Honeypot' Attractions

There are two 'honeypot' built and natural attractions critically situated at entry points to the Galtees: Cahir Castle and Mitchelstown Caves, respectively. These are an extremely important part of the tourism product mix in the overall area of consideration.

Cahir Castle is run under the management of the OPW, with 4 full-time staff and an additional 7 summer guides. It currently attracts 55,000 people per annum into Cahir, which although impressive, has shown a decrease since 2006 of 18,000 visitors. This may be partly explained by the opening of the M8 Cahir bypass, but also by the economic downturn in subsequent years. Cahir Castle does not have a dedicated sign from the M8 which management feels is a distinct disadvantage (*compared to e.g. Kilkenny Castle, which is signed off the M8 even though it is 30km away*). However, Cahir is signed as a 'heritage town'. Importantly, the Castle attracts large numbers of schools students, with 2,500 admitted freely when the visit is directly linked to curriculum studies.

The OPW also manage the **Swiss Cottage**, once part of the Butler-Charteris Estate, 2km downstream of the Castle along a landscaped trail beside the River Suir, surrounded by native broadleaf woodland. Planted from the 1790's, mature beech, oak, Spanish chestnut, sycamore, laurel, rhododendrons and elder can be seen. The area teems with wildlife. Swans, duck and cormorants are common, as well as red squirrel, pheasant and woodcock.

Mitchelstown Cave www.mitchelstowncave.com is a private, family-run attraction (by the English Family), which is open for most of the year and on request for groups. The opening of the M8 motorway has been instrumental in directing new traffic to them – 10,000 visitors per annum visit the caves, with an increasing number of indigenous Irish visitors, particularly from Dublin (1.5 hours away) and from 'new Irish' communities. Mitchelstown Cave charges €7/adult and €2/child, irrespective of groups etc. The family do very little promotion, and rely largely on word-of-mouth and their website.

The Caves attract an increasing number of Geography students, linked to the Leaving Cert curriculum, but tend to be 'day trippers' (*the students go on to the Knockmealdowns (Bay Lough/ Vee) to study glacial landforms, then Youghal to study planned urban environment and so home*), as teachers are disinclined to do a 2-day trip, due to insurance and other considerations.



This educational / Transition Year market, with professional development and add-on packaging, could be an attractive one for the Galtees community. Professional and targeted promotion to the Geography Teachers' Association and at Teachers' Conferences could yield positive results.

An additional attraction has been recently started up near Mitchelstown Caves by the family – the **Galtee Xtreme Adventure** facility, offering 'zorbing', foosball, buggy drives and other fun activities, suited to schools, youngsters and families.

4.4.2 Cultural Heritage – Traditional

Some unique 'soft' cultural heritage attractions have been developed in the past decade also – *Tigh Roy* in the western end of the Glen of Aherlow outside Galbally is a marvellous showcase for the Irish language, traditional dancing, music and general retreat style 'getaway'. Such venues have the capacity to attract considerably more visitors for a truly authentic experience of our culture.

4.4.3 Cultural Heritage – Food & Crafts

The Tipperary, Aherlow and Mitchelstown districts within the Golden Vale are steeped in agricultural history, in dairying, cheese production, bacon, tillage and pasture. Indeed, Slievenmuck (*the mountain of the pigs*) indicates a long association with pigs in the region. However, there are a relatively small number of 'artisan' producers in the area, with a start-up unit in Mitchelstown and a number of excellent craft butchers in Cahir and Tipperary, sourcing local produce for restaurants and supermarkets.

Given the agri-industrial history of Mitchelstown, there is real scope to develop an iconic 'Guinness Hop Store'-style **Food Experience** there. The town is 'crying out' for some major 'honey-pot' attraction and the Mitchelstown Forum has identified both 'food' and 'tourism' as central to the town's future prosperity. Mitchelstown will host a Christmas Food & Craft Market in Kingston Square in late 2011.

There is an excellent *Farmers' Market* in Cahir each weekend, as well as the *Old Granary Craft Centre*, which sells locally produced crafts. However, there are opportunities on an individual (or small group) basis to enhance skills, boost joint marketing and improve the overall bundling and packaging of offerings from the Galtees region over coming years. There is potential to develop an all-weather **Food & Artisans Market** in Cahir at *Fleuries on the Square*, based on the English Market in Cork, but this is under very early stage consideration only by the producers. It would aim to attract some of the 55,000 visitors per year who visit Cahir castle, but who then leave the town.

There is not a formal network of these producers in place, and it may be that they have yet to reach a critical mass for production and promotional economies of scale. In consultation with the *Tipperary Food Producers Network* (over 30 businesses employing 250 people in the whole of Tipperary), they do not see any opportunity for a sub-county network or brand emerging. It is too small to make an impact in the marketplace and would only confuse the customer and further fracture efforts to build synergy in the artisan food sector.

4.4.4 Cultural Heritage – Festivals & Events

A great variety of festivals and events are held in the Galtees area through the year. These include the following:

- **Glen of Aherlow Walking Festivals** (January / June Bank Holiday)
- **Ballyhoura International Walking Festival** (May Bank Holiday), including
 - Mountain Marathon
 - Special interest hikes (history, birds, archaeology etc)
- **Ballyhoura Beast - Mountain Biking** – Summer months
- **Cahir Go Léir** Community Festival – held in July/ August
- **Mitchelstown Artisan Food Festival** - August
- **Mitchelstown Independence Music & Arts Festival** (*Indie Music*) - July
- **Pride of Tipperary Festival**, 6 weeks of events, June-August
- **You-Tube Yippee Festival – Tipperary** – September
- **Mitchelstown Writers Festival** – celebrating the unique literary heritage of William Trevor, Elizabeth Bowen and Theo Dorgan (July). This event has the potential to become an international event of the calibre of Listowel Writers Week.



Interestingly, Tipperary Town also hosts the **Tipperary International Peace Convention**, which awards a prize for peace-making annually – see www.tipperarypeace.ie

Each town also hosts an array of arts and cultural events for the local population, which could be added to a tourism product mix. With the exception of the walking festivals, the events tend to be community initiatives, rather than promoted as tourist attractions. However, there is a nucleus of varied activity and cultural attractions, which could be packaged and expanded to make a **Galtees Arts & Activities Calendar** linked to recreational and cultural activities. There is enormous scope to build on the **food heritage** and develop **festival trails** to artisanal producers.

4.4.5 Cultural Heritage – Sports, Farming

Throughout Ireland, with the exception of Croke Park, there is no particular promotion or display of gaelic games in tourism terms, a unique cultural attribute which is potentially highly attractive, particularly for European visitors.

Potential exists to link with the local / regional GAA to develop a strategic partnership to bring GAA games to a new visitor audience. Examples of GAA showcases include *An Poc Fada* in the Cooley Mountains, which has become an annual flagship event.

Upland sheep-herding with sheepdogs is a highly attractive thing to see and is still carried out extensively on the Galtees. Such 'sheepdog showcases' could be developed as weekly tourism spectacles at the right season.

4.5 Community Assets

The Galtees' have a strong community ethos, with a significant number of active volunteers in GAA, Tidy Towns, Muintir na Tíre, ICA, Community Councils, as well as a whole range of voluntary supports to the elderly, involvement in gun clubs, walking clubs (mainly *Galtee Mountains Walking Club* and *Ballyhoura Bears*), as well as church activities and choirs. This provides a rich tapestry of community engagement on which to build a sense of 'ownership' of the Galtees as an integrated tourism 'destination'.

4.5.1 Community Resourcing

A number of individuals are involved in multi-activities and there is a danger of 'burn-out' and a need to recruit new membership, especially from among young people. There is a general feeling that during the 'boom' people had less time to volunteer; however, recessionary times may bring mixed blessings of unemployed people with skills and time on their hands.

However, the Tourism Development Strategy will require a 'driver' to implement the good will and energies of the community, public and business sectors.

4.5.2 Fragmentation

Much of the activity/recreational tourism effort is currently being undertaken by individual / private sector business interests, with some supports from Ballyhoura Development, Ballyhoura Country and South Tipperary Development Company. However, to date this activity has been fragmentary, with no unified vision for the Galtees to date. This study has been instrumental in bringing people together to articulate their aspirations in a collective community spirit, and provides a basis on which to implement the ultimate Strategy.

4.5.3 Muintir na Tíre

Muintir is highly active on a range of rural development tourism initiatives. They have indicated strong support for any actions that may eventuate from the initiative and are willing to work with the Steering Group as required.

4.6 Services & Amenities

There is a reasonable array of accommodation providers in the Galtees catchment, both in villages and four portal towns (see Table 3 and Map 7 below; also Map A1 in Appendix 1), primarily in the Hotel, B&B, Farmhouse, Self-Catering, Hostel and Camping/Caravanning categories. Most of these are approved accommodation providers by Fáilte Ireland, but others are operating in the 'grey zone' as unregistered B&Bs. Some 'pop-up' B&Bs open to support local walking festivals, but are not registered.

There is also a reasonable number of bistro-style restaurants in the four towns, but many of these close in the early evenings, as well as a number of good rural restaurants. There is a shortage of moderate priced lunch facilities suited to more European tastes in the villages, with notable exceptions.

The hotel sector is well-catered for, although all are experiencing a challenging economic environment. The *Cahir House Hotel* in Cahir and *Firgrove Hotel* in Mitchelstown cater to the traditional commercial and wedding markets, as well as tourism, whereas the rural hotels, *Aherlow House Hotel* and *Kilcoran Lodge*, also offer both hotel and self-catering chalet accommodation focussed on the outdoors and year-round recreational activity.

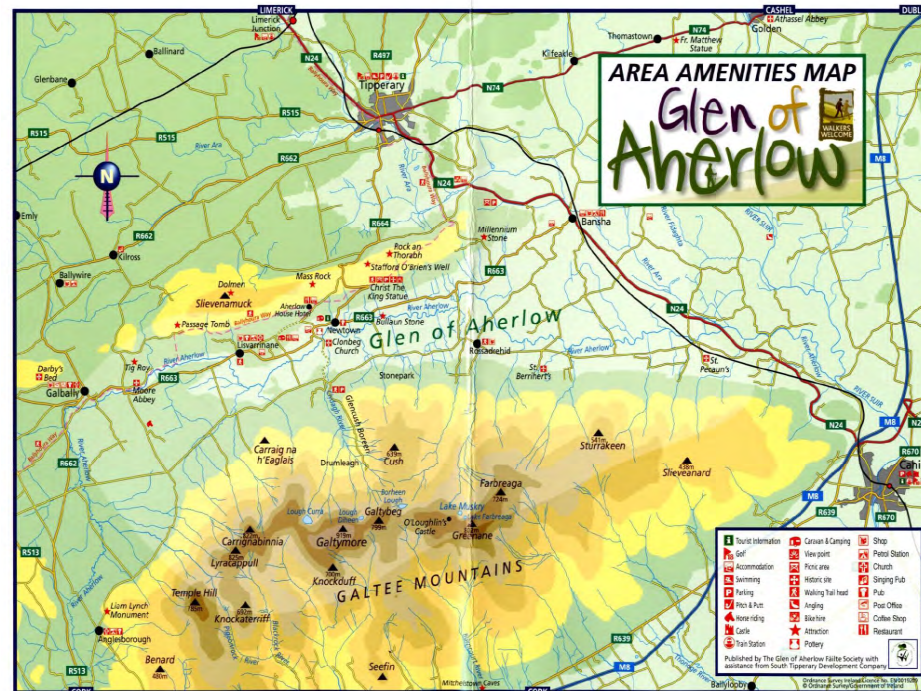


Table 3: Overview: Tourism Facility / Services Profile - Galtee Mountains
Sources - Fáilte Ireland www.discoverireland.ie; www.aherlow.com; www.ballyhouracountry.com

Area	Registered Accommodation	Visitor Attractions & Special Visitor Services	Primary Festival & Events	Outdoor Activity / Facilities
Limerick Kilfinane & Killmallock	11	11	14	11
Limerick Villages (W/NW): Anglesborough Galbally Ballylanders	3	4	4	3
Tipperary Cahir	10	7	6	5
Tipperary Town	10	4	5	2
Glen of Aherlow Villages: Lisvarrinane Rossadrehid Bansha	13	4	6	8
Tipperary Villages (South): Ballylooby Burncourt Skeheenarinky Kilbehenny	3	1	2	1
Cork Mitchelstown	8	3	4	3

SLR

There is scope to develop an expanded 'fit for purpose' accommodation base, based on recreational activity, akin to the West Highland Way (i.e. where the visitor walks/ cycle/ hikes and luggage transfers are arranged by the accommodation providers) – see www.westhighlandsway.com). An interesting approach may be to focus on rural homestay accommodation which can be built upon and expanded spatially across the Galtees, offering the traditional farm experience, walking / angling guides, rural retreat, yoga, equestrian etc.

Map 7 and Tbelow demonstrates the availability of a wide range of services in the Glen of Aherlow in the northern portion of the Galtees. This type of integrated mapping is required for the full 'necklace' of the Galtee Destination amenities.

While the walking product is very strong in the north (Aherlow) and west/ northwest (Ballyhoura) of the Galtees region, mountain biking in the west (Ballyhoura) and angling in the east, other niche outdoor pursuits, including Equestrian, Orienteering, Hill-Running, Rock Climbing, Canoeing, Kayaking, Downhill Biking, Shooting and Angling attract significant numbers of year-round activists. To date there has been scant tourism infrastructure put in place to attract these outdoor enthusiasts to the Galtees – simple items such as signage at portals; signage & maps at trail heads for climbs/ walks; parking areas; changing areas for hill events; fixed or seasonal training courses, climbing walls, etc could all be achieved for relatively low cost but with plenty of imagination.

The private sector in the Galtees has gradually been building up a range of products and services to support recreational/ outdoor activities, supported by Ballyhoura Country and Aherlow Failte, as well as tourism agencies. For example:

- ✚ *Hillcrest Equestrian* is an international-award winning, privately owned equestrian training centre situated near Moor Abbey, offering pre-hunting, group trekking and individual training courses for eventing etc;
- ✚ *King's Yard* near Skeheenarinky offers safe parking, camping, kitchen & shower facilities and permissive access to Galtymore (based on the 'Cronin's Yard' model for access to Carrauntouhil, Co Kerry);
- ✚ *Lazy Dog Shooting* near Kilfinane offers target practice and shooting events;
- ✚ *Cahir Anglers* offer gillies, rods, licences and packages for angling on the Suir;
- ✚ *Aherlow Failte* offers guided walks and events in Slievenamuck & Galtees,
- ✚ *Tigh Roy* near Galbally offers a unique cultural heritage experience of Irish language, music, dancing and storytelling, as well as yoga/ wellness and sauna in a retreat setting;
- ✚ *Ballinwillin House* is an award winning restaurant serving local produce, including venison from their own farm;
- ✚ *Mitchelstown Caves* offer a unique subterranean experience on the family farm, with a start-up outdoor recreation centre, *Galtee Valley Xtreme Adventures* offering Zorbing (see below), Giant Foosball, Archery and off road driving in a dune buggy



Zorbing in the Galtees

These types of private facilities are excellent in themselves, but are poorly integrated in terms of 'Destination' marketing, business development or promotion.

4.7 Public Supports & Partnerships

The area has a strong base of public support, one of its identified strengths during the recent consultation phase. However, there is a need for a Steering Group, to drive forward the implementation of a Tourism Development strategy, through capacity building, leadership and financial management.

Critical partnerships will require to be built locally among public and community stakeholders, including Ballyhoura and South Tipperary Development companies (Leader); South Tipperary, Limerick & Cork County Councils; Fáilte Ireland, Shannon Development; Coillte, Inland Fisheries and NPWS; local tourism business, communities and local development agencies. The inter-county and inter-regional alliance is critical, given that the mountains straddle three counties.

Additionally, strategic alliances among the policy makers and mountain users of the Galtees, Ballyhoura, Knockmealdowns and Comeraghs must be fostered from the outset to develop a longer-term vision for a collaborative 'Munster Borders' recreational destination of excellence – each sub-region with its own unique selling points.

4.8 Galtees: Summary Marketing Mix

Following the review above, it can be stated that the marketing mix of the Galtee Mountains comprises three key components:

- Product mix (what does the product look like, how does it perform, cost?),
- Distribution mix (how do I get and pay for the product) and
- Communications mix (how am I persuaded to buy?).

Each of these aspects has been examined and is summarised in Table 4 below.

Table 4: Galtee Mountains – Marketing Mix

Marketing Mix	Galtee Mountains Assessment
Product Mix	<ul style="list-style-type: none"> Galtees: dramatic, unspoiled, scenic, rural setting Excellent range of outdoor activities, concentrated in north and northwest of mountains – need to broaden geographic reach; Ballyhoura Country and Aherlow Failte excellent range & marketing Limited collaboration/ knowledge among service providers in 'necklace' around the broader Galtee ranges Portal towns have restaurants, shopping, transport, entertainment, pubs - can fill the gaps in rural areas Moderate accommodation base: Hotel, B&B, S/C, Hostel, camping Rural villages & pubs lacking responsiveness to outdoor activity needs (lunches/ soups/ maps etc) Two flagship projects (Cahir Castle & Mitchelstown Caves) near southern 'portal towns' – but no iconic attraction on north side of mountains where the recreational infrastructure is best Comment: weak horizontal and vertical integration of the product mix – weak collaboration among service providers. <p>Response: Strategic tourism planning required to build shared vision, product integration & activity packages.</p>
Distribution Mix	<ul style="list-style-type: none"> Tourism directories, Travel agencies, Tourist booking offices, Internet / website <p>Comment: Although there is a longstanding brand of 'Galtees' through the traditional food sector, there is no unique 'identity/ brand' & logo for Galtees as a tourism destination.</p> <p>Website required: 'One Stop Shop' online booking system must be developed given trends to pre-book and pay online for all-in breaks/ holidays – link to existing websites (portal Towns/ Aherlow/ Ballyhoura) to promote integration vs replication</p> <p>Response: Brand development by Galtees' Steering Group</p>
Communications Mix	<ul style="list-style-type: none"> Maps, advertising brochures, promotions, tourist offices and internet, weak to absent for recreational activities in Galtees Ballyhoura, Aherlow, Cahir Castle, Mitchelstown Caves marketed relatively successfully – need to integrate the message <p>Comment: No singular 'Galtee Mountains' entity with its own direct promotions /communications 'voice'</p> <p>Response: Website/ & promotional products require to be developed, to promote 'uniqueness' of locality as a DESTINATION.</p>

4.9 Comparative Analysis: the Scope for Destination Development

It was felt worthwhile to review other emergent inland Irish destinations, in order to understand the critical steps to developing a new concept, brand and identity in a crowded market place.

4.9.1 Ireland: GeoParks

In the original (2006) baseline study for the Galtee Mountains, a suggestion was made to develop the Galtees as a Geopark, as part of the international UNESCO network of geological 'wonderlands'. Geoparks are developed by partnerships of local authorities, communities and business sectors, funded by own funds, and subsequently, once certain criteria are met, are allocated the UNESCO 'imprimatur' of "Geopark".

There are now two fully fledged Geoparks in Ireland: (i) the *Copper Coast Geopark* in Waterford, celebrating the rich copper mining heritage of the Bunmahon coastal area and (ii) the *Cuilcagh Mountains Geopark* in Fermanagh, which has recently been extended into Co. Cavan to make the first transnational Geopark in the world. It encompasses the Marble Arch Caves and the Cavan Burren. Both are managed by a combination of community and public sector.

Candidate Irish geoparks include (iii) the *Burren* in Co. Clare, world renowned for its limestone karst landscapes and caves; (iv) the *Mournes-Cooley-Gullion* Geopark, also straddling the international border; (v) Joyce Country Geopark of northwest Galway/ south Mayo, near Clonbur; and (vi) the Kerry Mountain Geopark, based on the Iveragh Peninsula, incorporating Carrauntouhil.

In a previous study conducted on behalf of the Geological Survey of Ireland, on the value of Geoscience in Ireland (2008)⁸, SLR attempted to quantify the potential economic spin-offs of the geoparks in Ireland, but with the exception of Cuilcagh Mountain Geopark, there are no data available. The latter recorded about 55,000 visitors in total (50,000 to the Marble Arch Caves and c. 5,000 to the Geopark).

Following consultations, there was not evidence for a community demand for development of a Geopark – it would be imperative to have a driving community to achieve this status. There is little evidence that opting to develop a Geopark as a unique selling point in the Galtees would be advantageous at this stage, although there may be scope in the future should all the other product, networking and marketing requirements be delivered.

4.9.2 The Green Box – A New Concept

The Green Box was established as the island of Ireland's first eco tourism destination located in the cross-border counties of Fermanagh and Leitrim. It was built on the need for a quality standard to establish green credentials, delivered through a strong producers network numbering over 100 operators:

- Full Integration of Product Development / Training / Quality Assurance and Marketing
- Central location with team of 5, supported by full cross border Board
- Budget €2.5m for a 3-year programme;
- Conceived as a **new rural tourism model**:- creating a 'green' template which could be transferred to a small number of suitable destinations, eventually networking of these 'boxes' would radically shift the axis of Irish tourism in the direction of a distinct, quality assured, bottom up, environmentally sound, fit for market tourism offering. A *long view* strategy. See www.greenbox.ie
- Current status: awaiting new EU Interreg funding with a focus on training, packaging and marketing.



⁸ 'Gaining Ground' the Economic Value of Geoscience in Ireland'(GSI, 2008)

Table 5: How Do the Green Box and Galtee Mountains Destinations Compare?

CRITERIA	GREENBOX	GALTEE MOUNTAINS
Area & Territory	All counties Leitrim and Fermanagh excluding Carrick on Shannon and Enniskillen based on population. West Cavan, North Sligo and the souther tip of Donegal. Area = 1350 Sq miles	Incorporating parts of counties <u>Limerick</u> , South Tipperary and <u>Cork</u> . Area = 871 Sq miles
Population	95000	83000
Landscape	Leitrim: Hilly and mountainous landscape in its northwest and is relatively flat in the southeast. Fermanagh: Situated mostly in the basin of Lough Erne with accompanying rolling hills and pasture.	Highest inland mountain range (3000 ft+) located in <u>Ireland's Golden Vale</u>
Tourism History	Late started, poor infrastructure and blighted by the 'troubles'	Agriculture always prime industry. Poor infrastructure.
Iconic Attractions	Lough Erne / Shannon Erne Waterway	Galtee Mountains Historic Cahir Mitchelstown Caves
Community Infrastructure and Cohesion	Within counties good but cross border relations and joint working weak. Strong affinity with organics and self sufficiency.	Within counties boundaries excellent but cross country co-operation poor. Strong affinity with outdoor activity.
Access to Funding	International Fund for Ireland; Interreg and PEACE III - together with normal county & rural development funding means funding is seldom an issue with sustainable projects.	Reliant on county / rural development funding and some inter territorial or national/regional agency resources.
Policy Perspectives	Identified by the SEUPB as a priority project. Written into the County Plan of all the relevant authorities. Used as model destination by Failte Ireland to promote sustainable tourism planning.	Identified by the 3 X local authorities; 3 X regional tourism authorities and the 2 X rural development companies.

Green Box: Innovation & Strengths:

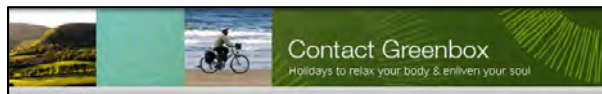
- Ambitious, innovative and integrated broad green tourism area based planning of scale
- Fully cross border in geographic makeup & participation ... new interesting dialogues occurred for the first time ... **outstanding existing product** and supporters already working in region
- Ahead of the 'curve' by a number of years (responsible tourism, ethical purchasing, carbon footprint) ... with early international accolades
- Principally employing / reemploying and linking existing 'assets' of the region ... sustainable
- Over twelve months of painstaking **consultation**
- Original **strategic plan drawn up in-house** ... the promoters knew the products and the capacity of the various actors best ... international best practice was heavily drawn upon
- Adequate budget to deliver on all strands of work

Green Box: Weaknesses

- Substantial private, community and special interest group buy-in initially to the process
- Complex structures largely driven by funding requirements ... a leadership challenge
- Constant confusion and different agendas unfolding between managing & participatory partners ... the core principles of the GB got somewhat lost in the 'noise'
- Inadequate internal and external communications
- **Great PR but poor marketing** leading to brand confusion in marketplace
- Inadequate sales of new products and packages created by operators to justify the investment of some in Green Box vision
- Commitment to **EU Flower** (EU eco tourism label) as the foundation stone of the project took considerable time to train up and get accreditation for the first wave of **28 operators** leading to a time lag before product got to market
- Cash flow difficulties for the organisation who was managing up to four different funding packages
- The new radical nature of the concept & the rush of support received at the outset was outside the *comfort zone* of many key partners & some board members ... panic often prevailed around the GB

Green Box: Transferable Lessons for the Galtee Mountains

- Keep simplifying the core message ... always answer the question "what am I selling"
- **Simplify structures** - keep it all simple
- Steady incremental growth works better than a 'big bang' approach ... the various funders have much to learn from deconstructing the Green Box case
- Don't underestimate the need for **immediate and visible commercial dividends** to private sector operators who buy into the process
- The Green Box was not an 'off the shelf' mainstream tourism offering but a gradual build up of responsible tourism capacity, allied to a smart long term relationship building exercise with multiple receptive markets both at home and abroad.
- The GB was designed for the next decade not a rival to existing destinations.
- Need for an appropriate balance of skills at senior management and at Board level ... given the unique nature of this exercise possibly more initial exposure to *models of best practice* in eco tourism destination building across Europe would have been advisable.
- **Despite difficulties an exciting destination / brand exists and should be built upon ... the birthing troubles of the GB should be reviewed by those driving the Galtee Mountains ...**



5.0 STAKEHOLDER CONSULTATIONS

Considerable consultations are held throughout March-April 2011 with key stakeholders in the Galtee Mountains 'necklace' catchment, which was followed up with secondary consultation in May 2011, to scope the potential for integrated tourism development. The list of consultees is presented in Appendix B. Critically, the mountains straddle:

- the three counties of Tipperary, Limerick and Cork;
- three local development areas (Ballyhoura/ South Tipp/ North East Cork); and
- three tourism development authorities (Fáilte Ireland SE; Fáilte Ireland SW and Shannon Development)

Thus, the Galtees have not historically been a high priority for any single county or development agency and, given their status as the highest inland range of mountains in Ireland, are consequently under-performing in tourism development and infrastructure.

The following gives an overview of the key findings, which will inform the subsequent stages of the project. Importantly, it is worth stating that given the time lapse between the original baseline survey (Keane 2006) and the current study, this project was effectively starting from zero base to build a sense of awareness of the initiative and community recognition of the potential for what might be in terms of integrated tourism development.

The consultations were targeted to five key sub-sectors:

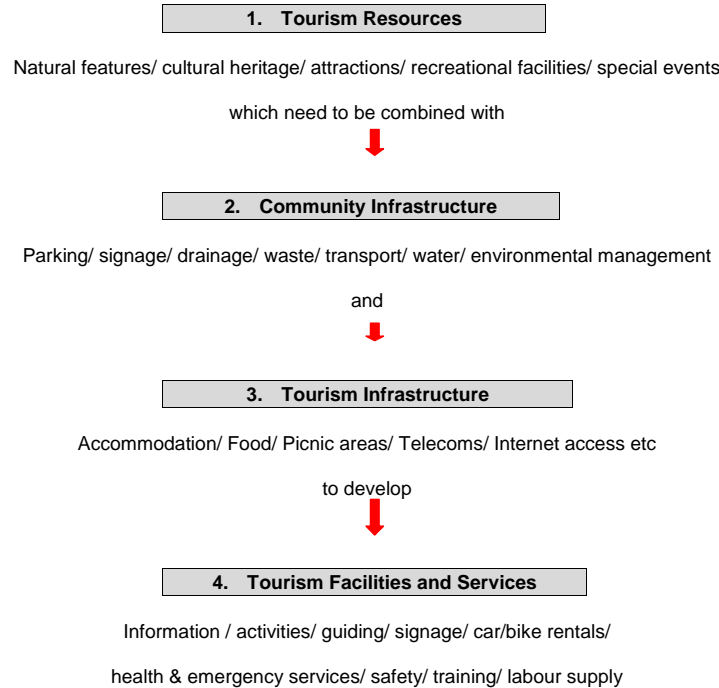
- Community Groups
- Development Sector / Public Agency
- Tourism Development Agencies
- Local Authority
- Private sector tourism operators/ service providers

All consultees were generous with their time and forthcoming with positive suggestions, proposals and observations. Over seventy six (76) people, including representatives from groupings such as Aherlow Failte, Ballyhoura Country and Mitchelstown Forum, were interviewed and their inputs formally recorded to inform all subsequent observations of strengths, weaknesses, opportunities and threats (SWOT analysis), as well as recommendations. In some cases there have been multiple follow-up contacts.

The formal consultations were followed on 7th June with a stakeholder consultative forum and workshop session in Mitchelstown, to provide feedback and propose a representative steering group. The 25 people who attended demonstrated a commitment to progress tourism in a more integrated fashion (see Section 5.2 below). Apologies were received from many who could not attend, but the active corps could comprise 35-40 people.

5.1 SWOT ANALYSIS – Galtee Mountains Tourism Development

In order to be a recreational destination of choice, the Galtees need to look at the supply chain for sustainable rural tourism:



In conducting a SWOT analysis, based on consultations, the Galtees is rich in tourism resources (1) and has components of all others, but the SWOT undertaken has identified specific gaps and strengths in tourism infrastructure (3) and services (4).

The key consultative findings and comments are presented in the following summary table (Table 1 overleaf). However, following second level discussions and more in-depth analysis of the 'strengths, weaknesses, opportunities & threats' (SWOT) of the region, the consultants subdivided the feedback and findings to six key elements which are presented in Table 2 below.

1. Admin & Operations	2. Communications/ Marketing
3. Landscape & Environment	4. Culture & Community
5. Business Issues \$\$	6. Political Environment

TABLE 6 : GALTEE MOUNTAINS TOURISM DESTINATION & MANAGEMENT PLAN – SUMMARY FEEDBACK

Name	Group Type	Key Issues	Suggestions/ Comments
Community Development Agency	Ballyhoura Dev Ltd. South Tipp Dev Mitchelstown Forum Aherlow Failte Ballyhoura Country	Baseline survey out of date – changed economic landscape Desire to see more unified action General recognition of structural weakness and fragmentation of effort Potential for parochialism/ clashes? Require strong Steering Group to drive this initiative – aging pop of ‘community actors’	Excellent initiatives underway at local level – integration required with strong unified vision for ‘Destination Galtees’. Single website & events calendar will be required. Hold invited Forum at end-May to develop a strong Steering Group representing all interests Facilitation will be required vs development of tender specs for capital projects in current climate? Galtees may be seen as ‘one trick pony’ (walking) – need to diversify the product offering Lack of packaging/ bundling of what is already there – poor collegiality in marketing by community/private No great appetite for ‘GeoPark’ – no hard economic evidence for value of this approach (<i>may be seen as a salvé by communities</i>) Strong community ethos and pride of place is a strength Excellent parish-level initiatives – looped walks/ heritage/ strong focus on working with agencies – can capitalise with new vision Focus on improved services versus capital projects Integration and use of web/ social media to increase awareness Move towards ‘neithir’ spirit with economic downturn Training will be required for guiding/ information points Happy to see this initiative gaining ground but some low level of suspicion that will be a ‘talking shop’ Generally very positive response, but recognition of weaknesses Ancillary ‘wet day’/ family activities required Integrated of recreational products (walking, hiking, events, equestrian, cycling, mountain biking x 2, angling, caving etc), heritage & services required Joint marketing of a single destination @ Galtees – collaborate to compete Use of admin/ office services by Aherlow Co-Op offered
Community Activist	Burncourt, Ballylooby, Kilfinane, Galbally, Aherlow Bansha, Kibbehenny, Anglesboro Cahir, Mitchelstown, Tipp Town	Strong & proud community networks, but aging ‘activist’ population Competing parochialism & lack of coherent vision for Galtees All happy to see initiative getting off ground and want to be activity involved	
Private Sector	B&Bs / Hotels/ Camping/ Hostels Activity providers Restaurants Food / Craft producers Guides	Fragmentation of effort & duplication across 3 boundaries at every level Falling rural tourism numbers in trad. sectors Sense of lack of support for new ventures Sectoral weakness in marketing & collaboration Need to get our own house in order before linking to Comeraghs/ Knockmealdowns etc Poor communication by development agencies with trade partners (?) Co-Ops keen to participate & offer support	
Recreational Group	Walking Clubs Cycling Mountain Biking Equestrian	Highly active clubs, volunteering alive and well Good mix of activities, but require integration Downhill vs cross country biking Excellent range of events through year	Harnessing of voluntary spirit to deliver combined ‘Galtee’ events Events calendar required (all season, all weather) Development of recreational mix, where specialists in one sector are aware of other sectoral events

SLR

Table 7: GALTEE MOUNTAINS TOURISM DESTINATION: SWOT ANALYSIS

GALTEE SWOT Analysis: STRENGTHS	
Admin & Operations Existing rural development bodies willing to collaborate Strong volunteer base Tourism bodies Admin 'homes' identified Centres of Excellence exist (walking, angling, mountain biking)	Communications/ Marketing 'Galtee' brand well known (cheese) Quality activity base can be built upon Food heritage & green image One of few destinations of scale as yet unexploited Existing skills in tourism marketing Significant budgets being committed
Landscape & Environment Geology, caves, mountains, rivers = Physical beauty, clean, green Archaeological & cultural heritage Excellent recreational base Positive history of walker access Hiking, biking, angling, equestrian, O-ing Forest & river access Motorway access	Culture & Community Strong & vibrant communities Civic pride – attractive villages High conc of rural dev professionals Strong festivals programme & potential High degree of buy-in to 'Galtee Concept' Joined-up approach could work well Excellent models: <i>Aherlow/ Ballyhoura</i>
Business Issues \$\$ Practical LEADER collaboration Growing awareness of 3 entities Strong agricultural base/ CoOps Economies of scale could be realised Case Studies available re. 'Destination'	Political Environment Public partners accept need for integration Local authorities willing to collaborate Significant public expenditure already Environmental Integrity is high on agenda Seek new solutions & synergies in recession
global environmental solutions	SLR

GALTEE SWOT Analysis: WEAKNESSES	
Admin & Operations Straddles 3 counties Potential suspicion across boundaries Who is the Driver – leaders, please! Need for allocated & adequate resources Need for clear 'Road Map' with early wins Absence of data on economic benefits Poor history of 'cross-border' cooperation De-resourcing of state agencies (NPWS)	Communications/ Marketing Challenge to inform all partners equally Poor international marketing – no 'identity' How will e.g. ' <i>Go Galtees</i> ' brand work with Aherlow, Ballyhoura, Cahir, Tipperary etc? – <i>avoid customer confusion & partner disharmony....</i> Lack of community 'inter-knowledge' Competition with 'mountain' destinations Poor signage off motorway (none in places!) Online marketing absent to poor - no website
Landscape & Environment Inadequate parking and signage Security of cars & belongings? Occasional litter blackspots.... <i>Black Road</i> Some dereliction in villages Coillte potential (<i>arboretum @ Glengarra</i>) Management of quads/ 4WD Built heritage is modest in rural areas	Culture & Community Limited awareness of needs of visitors Communities may feel lack of 'dividend' from walking/ hiking/ biking tourism Age profile of volunteers is ...aging Absence of evening entertainment Patchy delivery of food experience Heritage, sports & culture under-presented
Business Issues \$\$ Significant B&Bs unregistered – no strategy Weak business innovation/ specialism Weak cross-selling eg. <i>Galtee Passport</i> No iconic visitor 'magnet attraction' Limited public transport	Political Environment Resources scarce and competitive Do the private sector want? Will they 'drive'? Equal commitment by all partners? No natural 'leader' has emerged.... Investment in <i>established vs new</i> entrant???

GALTEE SWOT Analysis: OPPORTUNITIES

Admin & Operations Establish STEERING GROUP: build vision Dovetailed programme: avoid replication Use of social media for efficiencies Twinning with similar EU destinations Multi-discipl. business mentors locally GIS-database of all services/ products to identify gaps, needs, opportunities "Friends of"...volunteers? Study visits: other mountain destinations	Communications/ Marketing Community information campaign- build 'we' Merge customer databases: online/ mail shot Collective 'Galtee' web portal – link existing Develop tourism training in packaging online Enhancement of existing maps / Apps? New festival of international significance PR/ Media management strategy Articles/ Adventure / Activity mags/ UTube Engage marginalised to participate
Landscape & Environment Do not need big infrastructure...focus on enhancing adventure, food, heritage, hospitality. Caving, rock-climbing, equestrian, white-water-rafting, O'ing – more potential ??? Support existing Centres of Excellence <i>Galtee Mountain Partnership – integrate</i> What can be done to link existing villages Gardens of the Galtees...explore	Culture & Community Educational potential – geography/ caves/ planned towns/ heritage/ language Food / Markets/ Local & fresh/ Slow Food <i>Convivium?</i> Galtee Mountain Festivals....bigger and better Annual local tourism plans/ calendar of events 'Getting to know the neighbours' initiatives Competitions – photos/ art/ children/ poetry Reach out to diaspora.. Ceili House/ Tea Dances (non-pub) Develop family friendly activities: <i>deer stalking</i>
Business Issues \$\$ Corporate entities as backers (Food CoOps/ IT)? Aggressive networking of Tourism Offices IT links for customer surveys (LIT/ TI?) Train up Guides – themed trails	Political Environment Develop a common vision Combine resources: collaborate to compete Any political heavyweights Enumerate & present results to CoCos/ Agencies

GALTEE SWOT Analysis: THREATS

Admin & Operations Inadequate resources (staff, finance, capacity) Perception of another 'Talking Shop'? Who will take ownership? Loss of momentum unless 'early wins' delivered	Communications/ Marketing Inability to agree Galtees Brand & Approach Replication of marketing creates confusion in market Ability to target & package International markets Inability to broaden the offering beyond '1 trick'
Landscape & Environment Activities largely free .. benefit to communities? Over-reliance on Fas/ CE/ SE schemes? Impact of increased recreational usage on SAC Conflicting usage: walk, bike, 4WD/quad, farming Inconsistent & ambiguous signage Lack of 'wet day' / family attractions	Culture & Community Parochial self-interest vs 'greater Galtees' Incomplete outdoor services leading to conflict (P) Age profile of community activists Need to integrate walk/bike products <i>by people who understand the markets & potential – be smart!</i> Protracted disputes: shooting, 4WD, burning scrub vs recreational development
Business Issues \$\$ Stock of B&B shrinking (aging providers) Focus on international to compensate for depressed domestic market Inter-business networks may fail to deliver Broadband....urgent access required Deficit in IT/ Food/ Packaging/ Compliance Weak tourism infrastructure in East Galtees Hub towns off M8 need to be vibrant SPs	Political Environment Avoid parochialism Enlightened leadership required Avoid creation of false hope/ too high expectations Research carefully before commissioning Build strong partnerships & shared vision to compensate for lack of public financial supports

The key SWOT issues may be distilled to:

- Galtees straddle 3 counties: no coordinated plan for the whole area.
- Poor signage off motorways/ regional roads, often badly located and inconsistent
- Recreational parking facilities at many access points are inadequate
- Weak sense of '**Destination**': lack of accommodation-food-activity packaging
- Economic spin-offs are minimised due to short-stay or day-trippers: challenge this
- Strong environmental protection, but environmental pressure from walking tracks, quads, scrambling, burning scrub; other.
- Joint 'Galtees' vision & plan required to combat natural parochialism
- New brand reflecting the activity base required: e.g. **Go Galtees!**
- Strategic Plan required, with strong Driver/ Steering Group.

5.2 Consultative Forum 1

The first consultation event as part of the process was held in Mitchelstown Town Hall on 7th June 2011, to provide feedback to the communities and consultees, and to commence the process of building ownership of the project.

Up to 25 people, representing community, business, public sector and tourism development attended the event. Names of those signed-in participants are presented in Appendix C.



The key findings of the study to date were presented and it was interesting to observe the realisation by the group of the enormous social and recreational capital contained within the Galtees catchment. It was recognised that considerable effort will be required to 'join-the-dots' around the mountains to build a unified brand and 'destination'. A critical issue was to identify willing members to go forwards to a Steering Group to develop the Galtee Mountains as a branded tourism destination.

The recognition that the Galtees lack an iconic 'big bang' attraction to attract and retain family groups and outdoor enthusiasts was discussed and a facilitated workshop was held to identify suitably-scaled, sustainable projects that could be developed, incorporating ideas that had been picked up in the course of the consultations. Included among these were:


5.2.1 Big Ideas

1. **Galtee Mountains Partnership:** alliance of passionate volunteers with direction via Coillte, NPWS, Inland Fisheries (to be 'eyes & ears' of mountains; guides; litter management; information provision to visitors) etc., using the model of Dublin Mountains Partnership and others in the country;
2. **Hot Air Balloon Experience** across the Galtee Mountains – a 'wow' factor;
3. **Galtee Mountains Tree Top Adventure Park:** walk & rope adventure park in a selected forest site; suited to families seeking outdoor adventure, more challenging than the Lough Key canopy trail;
4. **Identify Core Sponsor*:** A range of Food Co-Operatives exist around the Galtees catchment (Aherlow; Tipperary, Dairygold) may be willing to link to the initiative, through admin, sponsorship of marketing, walks festivals, recreational activities – perhaps approach the Co-Ops, local equestrian studs, other businesses such as Pharma or IT sectors. (*Note that the Aherlow Co-Operative has already offered admin/ office support to the Steering Group)

5. **'Go Galtees'** Fundraising; given the straitened times, develop a Share Option Scheme, tapping local and (international) diaspora savings / venture funds;
6. **'Galtee Food Culture @ Heritage'** develop an iconic food experience akin to the 'Guinness Hop Store' experience in e.g. Mitchelstown, based on the long tradition of food growing, curing, processing and marketing, possibly with the support of the local Co-Operative Societies;
7. Major **Equestrian Experience** – develop a network of 'over-the-hills' multi-day horse treks, pony-trekking, racing, and all aspects of the equestrian traditions of the area;
8. **Specialist B&Bs** – develop specialist B&B / Guesthouse accommodation based on the strengths of the area: agriculture, recreation, culture, gaelic games, sheepdogs:

 focus on hospitality/ farm experience/ angling/ hiking/ biking
 Heritage Houses B&B – heritage homes/ architecture/ farm

9. **Reclaim the Road:** Given that most heavy traffic has moved onto the M8, is there scope to partially reclaim the N8 Cahir-to-Mitchelstown linear road into a community base e.g. every Saturday in Summer for *bike relays; run/ bike training; car boot sales; fun fairs; community walks etc.* This will require permission from the county councils.
10. **Stand-out Signature Projects** that have come before Co Councils in the last 10 years that never developed:

 **Ski-Lift** to Temple Hill from Anglesborough?

The group in Mitchelstown was asked to weigh up the above options, but also to propose new ones that had not been previously presented. 20 persons responded and the results are presented in Table 7 and Figure 2 visually overleaf.

Table 7: Ranking of 'Big Ideas' by participants			
No.	Big Idea	Score	Mean
1	Galtee Mountains Partnership	158	7.9
5	Galtee Food Experience	137	6.85
3	Galtee Mountains Tree Top Adventure Park	124	6.2
10	Stand-out Signature Projects	116	5.8
6	Equestrian Experience	110	5.5
2	Hot Air Balloon Experience	110	5.5
8	Identify Core Sponsor	96	4.8
7	Specialist B&Bs	94	4.7
4	Fundraising Share Option	82	4.1
9	Reclaim the Road N8	78	3.9

These can be represented visually as follows, which demonstrates broad acceptance for an iconic attraction to be developed, focussed on low impact 'wow', environment, landscape and

food (note 1, 2, 3 etc below relate to the sequential number (No) on the score sheet above vs the preference order).

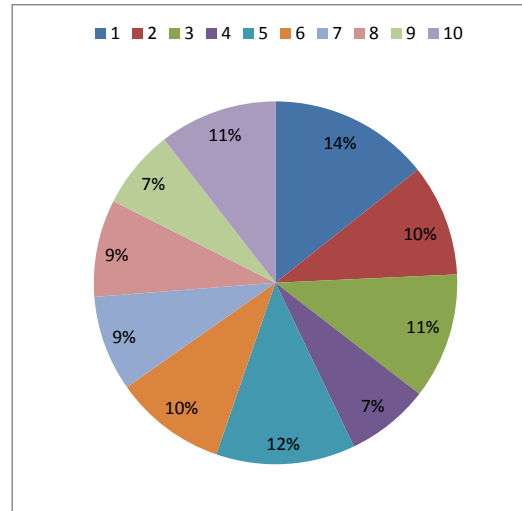


Figure 2: Graphic representation of 'Big Idea' Results

The group in Mitchelstown was also asked to come up with new or 'Not So Big' ideas (5.2.2. below) which could build on the existing recreational base (reviewed in Chapter 4 above).

5.2.2 Not So Big Ideas

Suggestions from the consultation phase were outlined to the group (which were not filtered against environmental impact or potential constraints in designated SACs etc), including:

- **Guided 'Niche' Walks:** archaeology/ photography/ geology / bats walks
- **Downhill Cycling Trail** to complement the contour trail in Ballyhoura (*Cambaum Wood* or *Monabrack Wood* identified as having potential)
- **Water sports facility** at Lough Muscray
- **Rock Climbing** – starter wall in Cahir, moving out to advanced cliffs at lakes
- **Orienteering** permanent trail to be emplaced e.g. at Glengarra Woods
- **Designate areas** for 4WD/ scramblers and quad biking/ 4X4 Challenge – fraught with conflict
- **Niche activities**....deer stalking, moths & butterflies, bat hunts, other 'family friendly' activities
- **Food Festivals/ Artisans Trails** – build on what's best about 'us' – strong agricultural and food production traditions.

▪ **Other?**

The last category '**Other**' came up with 39 novel ideas, including gold panning, cross-roads dancing, summer picnics on the mountains and multiple ideas for unique selling points. These are summarised below in Table 8. Some of the ideas are really 'do-able' while others are non-feasible given the environmental designations and constraints of the Galtee Mountains, in particular the construction of a new road to the summit of the hills (Kilbehenny to Temple Hill) to allow access for the non-elite/ elderly.

However, many of these ideas can be built upon as the fundamental framework is emplaced. There is strong support for accessible, family-friendly and community based initiatives. Importantly, many of these are low-impact environmentally, and require organisational skills vs. capital resourcing. This will have positive implications for the future work of the Steering Group, given the pragmatic recognition by all of the lack of public funding for new capital projects.

Table 8 New/ Not So Big Ideas – Proposed by Participants 7/6/11

Table9: New ideas proposed by Participants at Mitchelstown Workshop 7/6/11		No. times quoted	Commentary
1	Panning for Gold	3	
2	Rhododendron Festival		cf. Clogheen defunct festival
3	Good Food Circle & Artisans Food Trail	2	
4	Down Hill biking	2	
5	Ski-lift to Temple Hill (Toboggan in winter)	4	very expensive; did not work in Twin Town in Austria
6	Plant Walks (Flora of the Galtees)		
7	Boat on River Aherlow		kayaking/ rowing/ boat trips
8	Schools Day on Galtees		Get the kids out and about
9	Expand 'Tigh Roy' cultural product range		
10	Significant Exhibition Space	2	space in Mitchelstown
11	Walkers packages/product offering		
12	Hang-gliding from Pigeon Rock		
13	Driving route from Kilbehenny to Temple Hill	2	Allow access for the elderly
14	Use of defunct rail to trail (Limerick to Waterford)	2	
15	Eco building courses		
16	Nature photography/ competitions/ exhibitions		
17	Train track to mountains for small groups		
18	Cheese making in old buildings (aka Guinness)	2	focus on long tradition
19	Track to Ascaruaile Waterfall on Teampallan		
20	Summer picnic Sundays to peaks, lakes etc.		
21	Schools tours: archaeology, caves, horse riding		
22	Cookery school: focus on natural produce,		aka Ballymaloe
23	Barbecue & ceili on the hills/ set dancing / cross roads		focus on traditional culture
24	Use local pipe bands: learn to play the bagpipes		
25	Helicopters rides		
26	Website		
27	Partnership : working groups to address specifics		
28	Adventure Centre for 4WD/ Quads		work with vs against them
29	Music festivals/ Eco celebrations		
30	Archaeology workshops		

31	Iphone apps/ GPS for O-trail, walks, mazes		
32	Eco_Management courses		
33	Religious trail; holy wells, churches		link to Rock of Cashel, Holycross
34	Build a fun Maze	3	family friendly
35	Integrated mapping and signage		build the basics!
36	Blackberry Mile - Berry picking for visitors		
37	Family car Treasure Hunt (rainy day)		
38	Festivals with more focus		
39	Mass participation event accessible to all (eg mini marathon)		

5.3 Steering Group

There was a general consensus among all the consultees during the Phase 1 consultations and at the Stakeholder Forum in Mitchelstown that the idea of a *Galtees Destination* is worthwhile and that people at large were willing to put their shoulder to the wheel to achieve it. There is a recognition that the stakeholders must:

- ✓ Collaborate to compete against other tourism/ activity destinations
- ✓ Formulate a Galtee Mountains Partnership
- ✓ Identify a Steering Group to drive the Initiative
- ✓ Develop an Integrated Tourism Development & Management Plan

5.3.1 Steering Group Membership

There was considerable discussion among the stakeholders concerning the composition of the Steering Group. Central was the need for representative 'actors' vs 'talkers' with sufficient influence, political and business know-how to ensure delivery of the ultimate objectives. The suggested members were as follows (*some present volunteered; others who had stated in consultation that they were willing to serve on the SG – Table 9*):

Table 9: Composition of Proposed Steering Group

	Proposed Member	Representing
1	Mary Alice O'Conner	Tipperary Excel Centre
2	Pat Walsh	Aherlow Co-Operative, Bansha
		Aherlow Fáilte; Chairperson
3	Roy Galvin	Also cultural tourism private business
4	Pat Caplice	Cahir Development Association
5	Siobhán Finn	Mitchelstown Forum - Convenor
6	Bridget Ryan	King's Yard – private business/ landowner
7	Paul Mulcahy	South Tipperary CoCo, Engineer/ Planning
8	Tom O'Neill	Limerick Co Co, Heritage Officer
9	Paudie Fitzgibbon	Independent consultant/ Business Investor
10	Fergal Somers	Ballyhoura Country – Tourism Dev. Manager
11	Eimear Whittle	Faillte Ireland – to be confirmed
12	Mary O'Brien / other	Coillte Outdoors – to be confirmed
13	Candidate to be decided	Cork Co Co - tba
14	Candidate to be decided	South Tipperary Development
15	Candidate to be decided	Dairygold Co-Operative ?

It is anticipated that there will be a 'core circle' Steering Group, which would meet on a monthly basis, reporting to an 'inner ring' of concerned actors from Business, Community, Local Authorities and Agencies on a quarterly basis, which would then report to the broader 'outer ring' of stakeholders concerned with developing 'Destination Galtees' on an annual basis (Figure 3). All players would be expected to participate in 'Working Groups' to achieve particular goals. Examples of the WGs might be Partnership Building; Finance; Infrastructure & Planning; Communications; Festivals & Events; and 'AN Other' that the Steering Group might see as necessary. The WGs could draw in skills and expertise from the broader community as required, and dissolve as milestones are achieved.

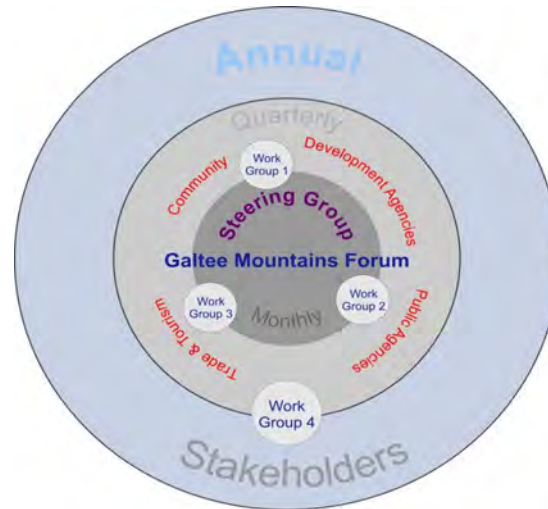


Figure 3 Proposed Structure: Galtee Mountains Partnership

5.3.2 Steering Group Mandate

The strategic management and development by a Steering Group of an integrated Galtees recreational and food tourism destination, working to an agreed action plan with support from all stakeholders, will be critical. The following must be priorities:

- Develop overarching **Strategic Plan** to clearly define the Galtees Project, its objectives, aims and actions to achieve them;
- Define what **strategic partnerships** are required among public and private sectors and community/ voluntary agencies to realise its success?
- Define **who will be responsible** for its management and implementation?
- Define who will **drive** the initiative?
- How will it be **resourced**?
- What **types of projects** to be implemented and
- Within what strategic **timeframes**?

6.0 THE WAY FORWARD

All those interviewed were keen to see 'something happening' as regards the Galtees as a tourism destination. There are very strong actors locally, but parochial interests will require leadership to develop a higher level collaborative approach to the building of a world class tourism destination, which covers almost 800km².

This will require a phased approach to focus on

- (i) **Organisational aspects** (project management, planning, financing, partner liaison, capacity building, business networking, training);
- (ii) **Product development**; infrastructure; value adding; product packaging
- (iii) **Communications** strategy: website, marketing and promotion
- (iv) **Target setting** & measuring the outcomes, through monitoring & evaluation.

This may require the appointment of a paid part-time or full-time **Project Officer/ Administrator** to communicate with stakeholders, build partner alliances, organise meetings, minutes, training sessions etc. *Note that Aherlow Co-Operative have generously offered to provide part-time administration and office facilities to get the project 'off the ground'.*

Given the reality of the 3-county approach, inter-territorial sensitivities will require to be well managed and also optimised in terms of resourcing of entire project. It will be important to have early 'wins' with practical and achievable signature projects to ensure that the community buys-in to the overall timeframe for delivery. Poorly managed expectations could be disastrous in the longer term.

It is recommended to form a **Galtee Mountains Partnership** (GMF) to work in a similar fashion to e.g. the Comeragh Mountains Forum, the Dublin Mountain Partnership and other development models around the country. A Steering Group as described in Section 5.3 above must be formed at the outset, with the support of the GMF from the start.

6.1 Galtee Mountains: Action Plan

A Galtees Action Plan should be developed at the earliest opportunity by the Steering Group and must be founded on sound social, economic and environmental sustainability:

1. **Define the Project:** Phase 1 of this project has focused on defining the current and possible tourism potential of the Galtee Mountains as Ireland's highest inland mountain destination. The product base will focus on recreational activities, food, heritage and product bundling to become a world class mountains destination.
2. **Build Steering Group:** The Galtees will require a strong inter-county partnership (*Galtee Mountains Partnership*) managed by a Steering Group to drive the implementation of the project.
 - Potential SG members have been nominated, sourced from tourism business, community, public sector and development agency.
 - A strong coordinator, as 'Chairperson', will be required.
 - This SG will require facilitation in the early stages to develop the Strategic Objectives, Aims and Actions to deliver the vision of a 'Galtees Destination'.
3. **Formulate a Budget** to underpin the initiative. Ultimately the objective is to facilitate private sector with key elements of public infrastructure.
 - What project resources are required?
 - What level of private investment will be committed?
 - From where can funding be sourced? Public? Private? Local/ Diaspora? Mix?
 - What 'soft' supports are available for training, capacity building?

- What can be achieved early on at relatively low costs (early wins)?
4. **Implement Action Plan:** The Steering Group will develop and implement an agreed Action Plan and will work to achieve product and service development, within recommended timeframes.
 5. **Partnership Alliance:** County Councils, tourism and rural development agencies, statutory authorities and the private sector will require to work together to build a common vision and destination. Strong leadership will be required to overcome natural parochialism and early wins will be essential to keep communities and business sector motivated.
 - **Secure Resources & Funding:** Resources will be required to implement the *Galtee Mountains Tourism Development Plan* in the short-, medium- and longer-terms. Build alliances with public partners such as Leader, Fás, VEC, County Council(s) and other potential supporters/ funders such as the EU InterReg programme will be essential.
 - **Build local awareness** of the Galtees Project to develop a sense of ownership using local press, newsletters, branded festivals and events; websites, facebook, twitter etc, and national activity media (Saturday press) to instil pride and recognition of the potential for new enterprise development.
 6. **Build Activity Base & Destination:** New products, enhancement of existing product & services;
 - **Build Capacity:** Integrated capacity building & training will be required to build networks, tourism business acumen, promotional skills, product development and delivery as well as environmental knowledge will be required. Many of these skills already exist but are fragmentary in delivery.
 - **Integrated packaging** of recreational activities, bundled accommodation & meal deals
 - **Integrated signage** strategy at entry points & portal towns to Galtees
 - **Parking** at trail heads, litter management;
 - **Maps & interpretative panels** in villages, showing trails.
 7. **Develop Marketing & Communications Strategy:** Design and deliver an effective internal and external communications strategy. Communicate to audience on responsibilities, actions planned, completed, promotions, with outputs and targets clearly set out.
 8. **Set Targets - Monitor & Evaluate:** Develop a set of community-based targets with which to monitor achievements and to allow progress to be measured.
 - Design early wins to gain recognition and sense of ownership (e.g. festivals, website, events calendar)
 - Consider facilitated workshops with community to allow people to develop their own performance indicators.
 - Feedback annually to the broader Galtee Mountains Partnership.

Once Steps 1-3 have been taken, it will be possible to derive detailed terms of reference and specifications for the priority projects. It is planned that these issues will be addressed in full by the Steering Group, with facilitation, in Phase 2.

6.2 Possible Priority Actions for Development of World Class Destination

Following consultations and discussion with Stakeholders at the Mitchelstown meeting on 7/10/11, a number of projects have been proposed for future consideration by the Steering Group. These projects will vary significantly in costs and development time, but are broadly categorised in short (S), medium (M) and long (L) term developments; at low (less than €15k), medium (more than €15k) and high (€50k plus) costs.

Table 9: Priority Actions For Development

Priority	Product Development	Comment
P1 STEERING & ALLIANCE BUILDING	Identify & Facilitate Steering Group Early stage identification of the SG to crystallise the 'Project'; develop a Strategic Plan; source funding & supports/ sponsorship; implement Action Plan Galtee Mountains Partnership Form an alliance of passionate volunteers, under the auspices of one of the critical public partners – base on existing successful models, eyes and ears of the mountains	S term; Low cost Recruitment of Key People Capacity building Training, mentoring; capacity building
P2 ENHANCE & EXPAND RECREATIONAL BASE	Build Network of Recreational Activities & Service Providers Walking/ Hiking/ Biking/ Angling/ Cycling/ Equestrian / Extreme Sports What are we selling? Collaborate to Compete..... Address service provision gaps (food outlets, specialist/ themed accommodation/ entertainment & heritage added offerings) Develop exciting adventure packages (activity, B&B, baggage, lunch, dinner, pick-up) – integrated, seamless product: See www.westhighlandsaway.com for example of best practice Build guiding skills/ mountain leadership (harness skills in community)	S-M term; Medium cost Convene alliance of service providers; capacity building/ networking Leader/ Failte Ireland support Clubs/ Fás/ Failte Ireland
P3 FOOD EXPERIENCE	Galtees Food Experience Develop 'Iconic Food Experience' akin to Guinness Hop Store in suitable venue in Mitchelstown Artisanal Trail – visit the artists and producers at work in the Galtees 'Necklace' of villages & towns	M term; High cost S-M term; Medium cost

Priority	Product Development	Comment
P4 MARKETING & PROMOTION	Marketing, Promotion, Communication Identify brand & logo e.g. 'Go Galtees' Internal & external communications – clarity of message Integrated Go Galtees Website (interlinked to Ballyhoura/ Aherlow/ Tipp/ Cahir /Mitchelstown etc) – unifying the products & services - not in competition Develop physical maps & products for walking / hiking/ biking/ angling/ gliding/ equestrian – web friendly, also downloadable at VIPs, Tourist Offices, B&Bs	S-M term; Medium cost Integrated mapping, consistency of branding/ logo/ message User friendly products
P5 COORDINATION OF EVENTS	Build 'Events Calendar' of festivals & events Enhance & develop the current range of the festivals & events, build on strengths of existing walking, biking and Arts festivals Coordinator to collate all events and use online software to develop calendar Develop simple downloadable flyers to promote activities	S term : Low Cost Downloadable events guides Co-ordinated approach to planning; avoid overlap
P6 BIG IDEAS	Scope the Big Ideas <i>Tree Top Adventure Park</i> <i>Hot Air Balloon Rides</i> <i>Equestrian Trails of international standard</i> <i>Downhill Biking</i> <i>Ski Lift to Teampallan</i> Scope for new Big Ideas Feasibility Studies on fully scoped projects for socio-economic viability; environmental sustainability	M-L Term; High Cost Work with Partners to secure support Scope ToR accurately Feasibility – hard economics Assess tenders
P7 RESOURCES & FINANCE	Scope the 'Not So Big' Ideas use local and latent community skills to develop e.g. gold panning, cross-roads céili, summer picnics on the hills, festivals, etc. <i>as shown on Table 8 above.</i> Resource the Project Adequately Appoint part-time/ fulltime project Officer Identify potential early stage supports Critical public infrastructure to support private investment in recreation / adventure Seek sponsorship from local Co-Operatives/ Pharma/ IT companies	S-M term; Low cost For early wins to bolster community goodwill S-M-L Ongoing; Medium cost LEADER Co Councils Private Sector Sponsorship

7.0 CONCLUSIONS & RECOMMENDATIONS

Following the development of a Baseline Study in 2006 for an integrated approach to tourism development in the Galtee Mountains, straddling the three counties of Limerick, South Tipperary and Cork, this Phase 1 study was carried out during March–May 2011, to scope out the potential for the development of a vibrant and internationally significant tourism destination. The project was designed to identify and facilitate a Steering Group to develop a series of project ideas, which would be scoped and tendered, with a view to adding to the current recreational offering in the Galtees. The following conclusions and recommendations may be drawn.

7.1 Conclusions

For the purpose of the study, the Galtee Mountains area of influence encompasses almost 800km² within the portal towns of Kilfinane (west), Cahir (east), Tipperary Town (north) and Mitchelstown (south). A network of 10 villages ('beads') host vibrant communities in a 'necklace' around the foothills of the mountains, which offer limited food and accommodation, but excellent examples of rural vernacular and cultural heritage.

A number of existing recreational 'brands' are already operating successfully in the Galtees, including '*Ballyhoura Country*', centred in Kilfinane; '*Aherlow Fáilte*', centred in Glen of Aherlow and '*Excel*' in Tipperary Town, previously a garrison town with strong architectural and heritage features. Cahir is a designated heritage town, with the eponymous Cahir Castle as the jewel, while Mitchelstown is an excellent example of an 18th century planned town, with very significant architectural features. It is increasingly focused on development of tourism, with particular emphasis on food, given its long traditions, and recreation in the Galtees.

The area has an extensive recreational infrastructure on the northwest and northern side of the mountains, with limited recreational infrastructure on the southern and southeastern sides. The supporting services are good in the four towns, offering hotel, guesthouses, B&B accommodation and a range of bistro style restaurants. The villages require additional 'walker-friendly' accommodation and food outlets, while locally (e.g. Kilfinane, Glen of Aherlow) a range of inter-dependent services exist (recreation, information, food, camping, B&B, hotel, restaurant).

Additionally, three Fáilte Ireland centres of excellence are located in the Galtees catchment:

- Glen of Aherlow - Walking centre of excellence
- Ballyhoura - Mountain Biking centre of excellence
- Cahir - Angling centre of excellence

Despite the natural and cultural strengths within the Galtees catchment, there is an intense parochialism with healthy competition among adjacent parishes. Although, the existing brands have been well positioned, there is scope to go to a new level and build an outdoor recreational integrated destination on the highest inland mountains on the island. It will be critical to overcome these natural rivalries to build a world-class tourism destination. This must be delivered in such a way so as not to threaten the existing brands which have been built up over years; however, collaboration amongst all parties will allow the Galtees to compete in an ever-crowded market place.

The work in Phase 1 has focussed on the widest consultation to build a sense of 'the possible' and to develop ownership of a challenging but vibrant project, to be called something like '*Go Galtees!*' to signify the activity-based /food/ heritage product, suited to outdoor activists, family groups and active retired. A Steering Group has been identified to take the project to the next level. Phase 2 will address the recommendations of this report.

7.2 Recommendations

It is recommended that:

- ✓ Steering Group (SG) to be convened at the earliest stage
- ✓ Facilitation of the SG to focus on strategic planning to deliver resources and projects as identified in Phase 1, agreed actions, targets and timeframe for delivery;
- ✓ That 'Galtee Mountains Partnership' building commence at the earliest stages (public, private, community);
- ✓ Core products and services will require enhancement, integration, packaging and bundling, marketing and delivery. It is recommended that networking of service providers commence to build a common vision, brand and understanding of the overall project potential. Capacity building may be required for specific projects and service delivery;
- ✓ Establishment of promotional resources, website, calendar of events etc
- ✓ Provision of key public infrastructure will be critical to support private sector investment – integrated 'Galtees' signage, parking, outdoor facilities as required by specific projects;
- ✓ Effective communications both internal and external;
- ✓ Community support will be vital to all of the above – supports must be offered to them in the form of 'early wins' through festivals, increased visitor numbers; photographic displays etc.

8.0 CLOSURE

This report has been prepared by SLR Consulting Ireland with all reasonable skill, care and diligence, and taking account of the manpower and resources devoted to it by agreement with the client. Information reported herein is based on the interpretation of data collected and has been accepted in good faith as being accurate and valid.

This report is for the exclusive use of the Client; no warranties or guarantees are expressed or should be inferred by any third parties. This report may not be relied upon by other parties without written consent from SLR.

SLR disclaims any responsibility to the client and others in respect of any matters outside the agreed scope of the work.

APPENDICES

Appendix A

Map A1 – Recreational Infrastructure : Galtee Mountains

Appendix B

Galtee Mountains Tourism Facilitation & Management

List of Consultees

COLOUR KEY

Public Sector / Development Agency	Private Sector/ Enterprise	Community Entity	Recreational Interest Group/ Private
---------------------------------------	-------------------------------	------------------	---

Name	Address	Mobile/ Phone	Email
PUBLIC SECTOR/ DEVELOPMENT AGENCY			
Pádraig Casey	Ballyhoura Development Limited		pcasey@ballyhoura.org
Isabel Cambie	South Tipp Development Company		isabel@stdc.ie
Siobhan Finn	Michelstown Forum <i>Development Manager</i>	0862872286	siobhan.finn@mitchelstown.eu
Fergal Sommers	Ballyhoura Fáilte Manager	0872755273	fsommers@ballyhoura.org
Eileen O Keefe	Ballyhoura Development	06391300/ 087 7582676	eokeeffe@ballyhoura.org
Sadie Allen	Ballyhoura Development	02585213/ 0877657414	sallen@ballyhoura.org
Eimear Whittle	Failte Ireland _ SouthEast region	051 312708/ 086 6000650	Eimear.whittle@failteireland.ie
Josephine O'Driscoll	Business Development Manager Failte Ireland, Cork - Kerry	086 8099330	josephine.odriscoll@failteireland.ie
Mary O'Brien	Collite	087 963 2820	Mary.O'Brien@collite.ie
Sharon Casey	Cork Heritage Officer	021 427 6891	
Tom O'Neill	Limerick Heritage Officer		tonelli@limerickcoco.ie
Labhaoise McKenna	South Tipperary Heritage Officer, Clonmel	061 496350	heritage@southtippcoco.ie
John Crowe	Shannon Development Vice-Chair Limerick Tourism EXCEL Tipp Town	061 402210	crowei@shannondevelopment.ie Board Member - Ballyhoura Tourism development manager
Mary Alice O'Conner	Geological Survey of Ireland		Co-ordinator of Geoparks Ireland
Sophie Pretesaille	South Tipp Co Co Community & Enterprise	01 678 2741	Eileen.horgan@southtippcoco.ie
Eileen Horgan	South Tipp CoCo/ Cahir Town Council Director of Svices		sinead.carr@southtippcoco.ie
Sinead Carr	Executive Area Engineer – Tipp Town / South Tipp CoCo		Aidan.finn@southtippcoco.ie
Aidan Finn	Area Engineer –South Tipp CoCo	087 828 0060	Paul.mulcahy@southtippcoco.ie
Paul Mulcahy	Senior Planner, South Tipp CoCo		Jim.omahony@southtippcoco.ie
Jim O'Mahony	Cork Co Co: Director Environmental Services		Was involved in Baseline Study – has moved section to Envir Services.
Sharon Corcoran			

Rose Carroll	Cork Co Enterprise	Cork Co Community & Enterprise	021 4285445	Responsible for Tourism within Enterprise section
Brendan O'Gorman	Cork Co Co Area Engineer NE		025 24944	Based in Mitchelstown
Andrew Hind	Cork Co Co - Planning		021 427 6891	Andrew.hind@corkcoco.ie
Anthony Coleman	Limerick Co Co Community & Enterprise/ Tourism		061 496454	acoleman@limerickcoco.ie
Carmel Fox	CEO, Ballyhoura Development Ltd,			cfox@ballyhoura.org
Gerry Sheeran	Limerick CoCo- Senior Planner			gsheeran@limerickcoco.ie
Anthony Coleman	Limerick Co Co Community & Enterprise/ Tourism		061 496454	acoleman@limerickcoco.ie
Bernadette Collins	Limerick CoCo - Planner			bcollins@limerickcoco.ie
Tom O'Neill	Limerick CoCo – Heritage Officer			toneill@limerickcoco.ie
Suzanne Campion	Inland Fisheries Ireland (Director, Clonmel)		087 205 4910	david.mcinerney@fisheriesireland.ie
David McInerney	South Tipp Development		052 6180055	con@gleann.net
Con Ryan	Rural Recreation Officer			
Séan Breen (South Tipp/Cork)	NPWS		087 2646441	Sean.breen@environ.ie
Stefan Jones (North Tipp)				
Elaine Keegan (Limerick)				
Caitriona Long	Cahir Failte Ireland office		Called in at office	brief meeting re recreational infrastructure/ maps
PRIVATE SECTOR				
Denis Keane	Business Consultant, Mitchelstown		087 2216789	Author of Galtees Baseline Study (<i>Ex-Cailte</i>)
Ben O' Sullivan	Deebert House Hotel Kilmallock Chair, Ballyhoura Failte		087 4180181 / 063 82002	
Roy Galvin	Tigh Roy, Galbally		087 2572281	
Pat & Miriam Mulcahy	Ballinwillin House, Mitchelstown		086 256 1578	irishvenision@eircom.net
Pat Tagney	Firgrove Hotel, Mitchelstown		025 24111	
Reads	Reads Park, Galbally		062 37213	info@readspark.com
Ray Sampson	Owners: Reads Park Self Catering		062 53563	lazydoughshooting@eircom.net
	Lazy Dog Ltd		087 9079556	

Chris O'Callaghan	Self-employed; (mountain bike hire in Ballyhoura / Arpatrick region)	Trailriders	087 2033060	chris_ocallaghan@eircom.net
Steven & Brigid Ryan	Kings Yard, Knocknagalty, Skeheenarinky		025 84903 087657 3276 086 233 8894	http://kingsyard.wordpress.com walshco@eircom.net
Pat Walsh	Aherlow Co-Op – Manager of plc		062 37915	hillcrestcentre@eircom.net
Aodh Kennedy	Founder Member – Aherlow Co-Op		086 3225072	
Annette O'Donnell	Hillcrest Equestrian		087 771 6355	JackieLynch307@yahoo.ie
Matt Slattery	Galtee Harriers, Chair			
Lexie West	Marian's Pony Club, Ballylanders			
Marie Reidy	Burcourt Stables			
Carlona Neary	Walking Hub Consultant		086 805 6669	Advises Faillte ireland
Michael Smith	Chair: Kerry Mountain Geopark (candidate Geopark)			mhsmithgeo@gmail.com
Danny O'Sullivan	Kildrum House, Mitchelstown		087 873 6219/025 84575	
Paudie Fitzgibbon	Consultant with PM Global - Investor/Developer - business development opportunities in region.		M: 086 2616195	fitzgibbonpj@gmail.com Resident of Mitchelstown
Eamonn O'Brien	Chair of Mitchelstown Business Association/ also CCM Properties		M: 086 8137959	Eamonn@ccmproperty.com
Ger Moylan	Previously a publican in Mitchelstown		: 087 6880502	gmoylan@yahoo.com
John English	Mitchelstown Caves		052 7467246	visit@mitchelstowncave.com
Eamonn English Brian Moore	Galtees Xtreme Adventures Avondhu Press		025 24451	news@avondhupress.ie
COMMUNITY				
Jim Fitzgerald	Chairperson, Galbally Community Council, Co Limerick		086-2739940	jimfitz125@eircom.net
Paddy Caplice	Cahir Development Association		087 224 7453 052 744 1514	pat@caplice.ie
Pat Dalton	Kilbehenny Community Centre, Kilbehenny, Co Cork		02524266	
Moss Fitzgerald	Kilbehenny Community, Co Cork			Moss.fitzgerald@gmail.com
Pat English	Anglesboro Community Council,		0862522972	

Michael Lewis	Co Limerick			madhclewis@yahoo.ie
Johnny Butler	Anglesboro – retired school teacher/ Burncourt Community Council, Co Tipp	087 6602010 021 4974003 (w)		john.butler@pfizer.com
Breda Beary & Ella O'Dwyer	Ballybooby Community Council, Co Tipp	087 254 7423		
Jim Flynn	Ballyhoura Fáilte, Main street, Kilfinane	0872833456		iflynn@ballyhoura.org
Helen Morrissey	Aherlow Fáilte Manager	062 56331/ 086 831 4443		info@aherlow.com
Liam Kelly Julie O'Halloran	Muintir na Tíre			lkelly@muintir.ie iohalloran@muintir.ie
RECREATIONAL INTEREST GROUP				
Suzie Flavin Margaret McNamara	Ballyhoura Bears Walking Club	0851448015		
Tom Lyons (chair) Mo Larkin (sec)	Galtee Mountains Walking Club	096 3593024		Larkin2004@eircom.net
John O'Dwyer	Walking / Aherlow Co-Op	087 798 3197		John.odwyer@teagasc.ie
Chris O'Callaghan	Mountain TrailBiking - Ardpatrick	087 2033060		
Caitriona Murphy	Journalist/ Equestrian enthusiast	085 7192155		Caitrionamurphy1@gmail.com
Eileen Quinlan	Limerick Climbing Club			By email

Appendix C

Attendees at Consultative Forum

Mitchelstown, 7/6/11

Galtee Mountains : Stakeholder Forum 1

Firgrove Hotel, Mitchelstown, June 07. 2011

	Contact	Organisation & Name	Tel./+Email
1	Ray Sampson	Lazy Dog Limited	087 9079556
2	Mark Ryan	Mark Ryan (South Tipp. Co. Co.)	mark.ryan@southtippcoco.ie
3	Patrick English	Anglesboro Community	086 2522972
4	Bridget Ryan	Kings' Yard, Skeheenarinky	087 6573276
5	May Alice O'Conner	Tipperary Excel Centre	087 6251352
6	Sean Brereton	Biker/ Photographer	brereton.it@gmail.com
7	Carmel Fox	Ballyhoura Development Ltd	cfox@ballyhoura.org
8	Fergal Somers	Ballyhoura Fáilte	fsomers@ballyhoura.org
9	Ella O'Dwyer	Ballylooby Community	087 9853040
10	Breda Beary	Ballylooby Community	052 7465108
11	Br. O'Sullivan	Ballyhoura Fáilte	087 4180181
12	Maureen O'Brien	Ballyhoura Bears	087 9833962
13	Jimmy Barry	Walking Guide, Photographer	087 2975178
14	Jim Fitzgerald	Galbally	086 2739940
15	Margaret McNamara	087 9633060	margaretmcnamara45@gmail.com
16	Eamonn English	Mitchelstown Cave/ Xventure	052 7467246
17	Siobhán Finn	Mitchelstown Forum	086 2872286
18	Julie O'Halloran	Muintir na Tíre	087 6369146
19	Stephen Barry		086 3644588
20	Paul Mulcahy	South Tipp. Co. Co.	087 8760060
21	Mary T. Lane	Anglesboro Community Council	086 3817788
22	Roy Galvin	Aherlow Fáilte/ Tigh Roy	087 2572281
23	Tom O'Neill	Limerick County Council (Heritage)	061 496350/ 087 2850986 toneill@limerickcoco.ie

Apologies:

Isabel Cambie STDC; **Padraig Casey/ Jim Flynn** Ballyhoura; **STDC Denis Keane**, Consultant;
Pat Caplice, Cahir; **Pat Walsh**, Aherlow Co-Op; **Helen Morrissey**, Aherlow Fáilte;
Eimear Whittle, Fáilte Ireland; **Con Ryan**, Tipperary RRO
Mary O'Brien & Liam Cleary, Coillte; **Sean Breen**, NPWS
Jon Crowe, Shannon Development; **Moss Fitzgerald**, Kilbehenny Community Council;
Jim Flynn, Ballyhoura Walks Officer; **Suzie Flavin**, Ballyhoura Bears;
Pat & Miriam Mulcahy, Ballinwillin House