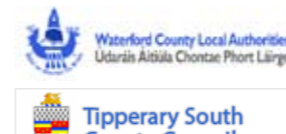




Concept Development and Feasibility Study – Munster Peaks (Working Title)

Prepared on behalf of



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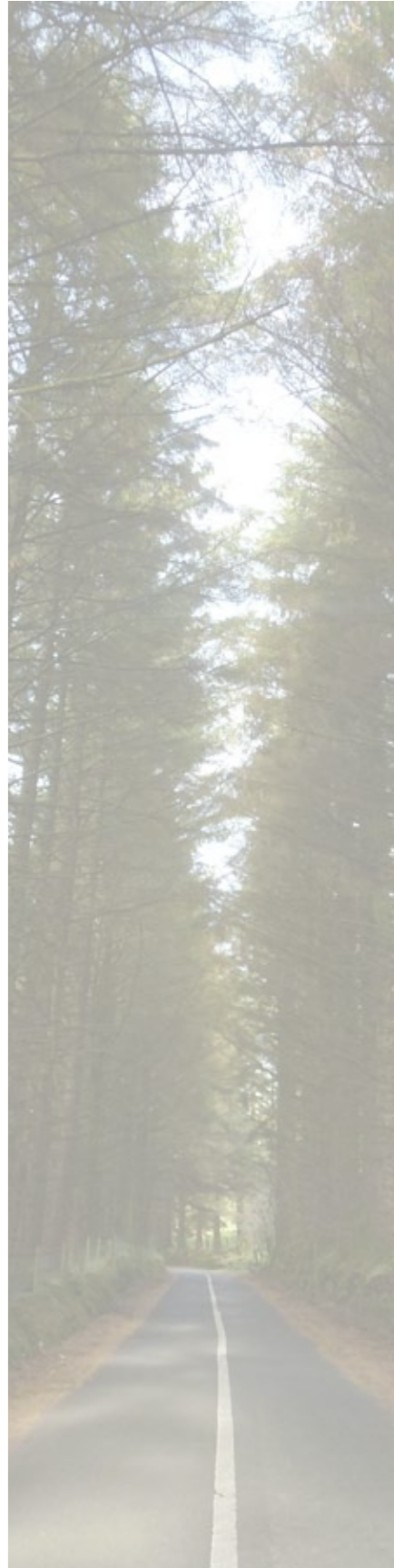




Concept Development and Feasibility Study – Munster Peaks (Working Title)

Munster Peaks - Project Steering Group

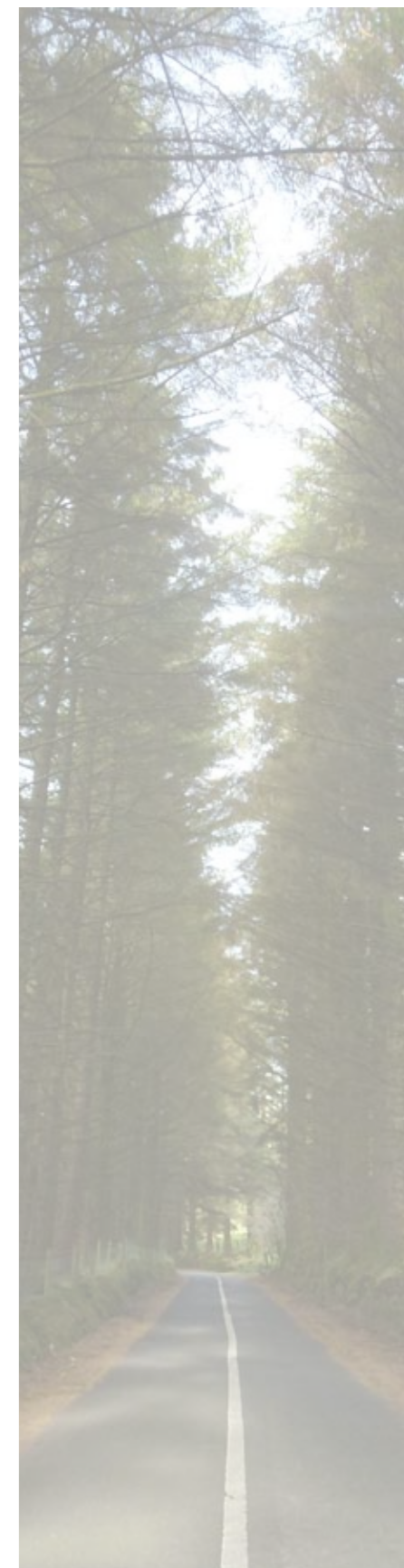
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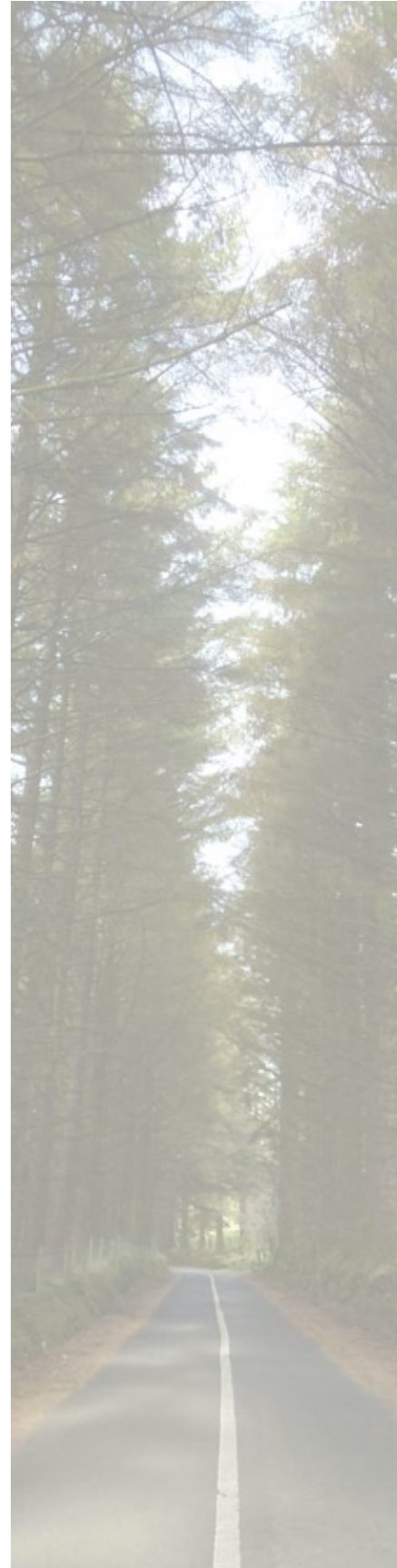
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Headline Findings

- 1 The concept of an integrated region offering an extensive range of high quality recreational activities; alongside a rich built and cultural heritage; with communities that welcome visitors warmly and serve them efficiently, meets strong support both among the stakeholders of the wider region and the international travel trade.
- 2 The **Great Southern Mountain Park** can be greater than the individual parts while boosting the existing specialisations in different parts of the region. Its creation will:
 - establish the identity of the study area as a distinctive, integrated, complementary set of tourist and recreational attractions and activities that represent a key component of the tourist product offering of the Southeastern part of Ireland,
 - help to position the area as a premier location in Ireland for walking, biking, equestrian, river-based and coastal outdoor recreational activities ,
 - diversify the appeal and attractions of the area beyond outdoor activities, while not undermining its excellence as a leading destination for such activities, and,
 - enable the area to capitalise on its rich medieval heritage & outdoor activity opportunities through linkages with those in neighbouring counties, and
- 3 The process of establishing the **Great Southern Mountain Park** as a successful, sustainable destination will be a gradual process over several years requiring:
 - Strong leadership and a fully-representative development and management institutional body,
 - Coordinated, collaborative programme of actions in respect of the development of the necessary infrastructure, amenities and facilities, and products/experiences,
 - Marketing and promotion that is progressive in terms of intensity with claims in line with what the region is capable of delivering successfully in order not to create false expectations in the marketplace



CHAPTER ONE: INTRODUCTION

1.1 Project Brief

A public request for tender document (the Tender Document) specified the requirement for a Concept Development and Feasibility Study of a geographically contiguous area (to be referred to by the working title of Munster Peaks) comprising the inland mountain ranges of Munster, namely the Comeraghs, Knockmealdowns, Galtees and Ballyhouras, divided by a set of four county boundaries (of Waterford, Tipperary, Cork and Limerick), situated equidistance between four of Ireland's six cities: Cork, Limerick, Waterford and Kilkenny.

The Tender Document states that:

- The four ranges provide a mix of soft outdoor recreational activities (i.e. walking, cycling and angling), historic, coastal and rural towns and villages, and numerous heritage and cultural attractions of scale and significance, and
- The area boasts a year-round hospitality offering including a number of established festivals and events, many of which celebrate the rich heritage and traditional culture of these mountain areas

The Tender Document indicates that under the National Development Programme 2007-2013, significant investment in the activity infrastructure in the area has contributed to the development of looped walks, heritage drives, mountain bike trails and river based activities. Alongside these capital investments, the trade partners in these locations have worked together via the activity programmes of the Walkers Welcome (Glen of Aherlow & Comeragh Mountains), Anglers Welcome (Cahir) and the Get Out There Hub in Ballyhoura.

Within the area there are established local tourism, business and stakeholder groups, as follows: Ballyhoura Fáilte, Aherlow Fáilte, Galtees Recreational Steering Committee, Knockmealdowns Active (Tipperary based), Knockmealdown Forum (Waterford based), Comeragh Mountains Forum and County Waterford Trails Committee, South Tipperary Tourism Company, South Tipperary County Council, Waterford County Council and Waterford Leader Partnership.

The Tender Document identifies the fact that the area continues to be presented and promoted based on county boundaries - Dungarvan and West Waterford (including the Comeraghs), the Knockmealdowns/ Galtees and Ballyhoura - by-and-large, as standalone experiences within a portfolio of county offerings.

Despite the available good infrastructure, services, heritage and culture experiences these four mountain areas are currently perceived by the area's stakeholders to be underperforming in tourism terms. In consequence, the county authorities through Waterford Leadership Partnership established Munster Peaks Committee 2013 to investigate:

1. Whether an umbrella brand proposition and a collaborative structure for the area is desirable and achievable, and
2. Whether a proposition of sufficient scale and singularity (in terms of coherence, originality and market-readiness) can be created to significantly improve the economic performance of tourism in the area.

The tender document specified that such an assessment should meet the following objectives:

- Increase visitor numbers, dwell time, spend and satisfaction in the area,
- Re-package the area as a destination to overseas and domestic visitors and establish a product and brand of sufficient scale and singularity to enable successful marketing overseas and domestically,
- Build on the infrastructure work completed to date and increase collaboration between destinations, industry providers and groups,
- Identify and specify appropriate product bundles to be marketed and developed by the tourism trade,
- Improve linkages between and add value to a range of attractions, activities (& experiences), and service providers,

- Reinforce the particular strengths and characteristics of particular destinations and at the same time offering the visitor one overarching compelling reason to visit,
- Identify tourism experiences which while not located in the 'Munster Peaks' geographical area, have linkages with the area, i.e. St Delcan's Way, a pilgrim path from Ardmore to Cashel, the Rock of Cashel, The Beara Breifne Way, Lismore Heritage Centre, and
- Agree on the geographical area within which the Munster Peaks has been defined.

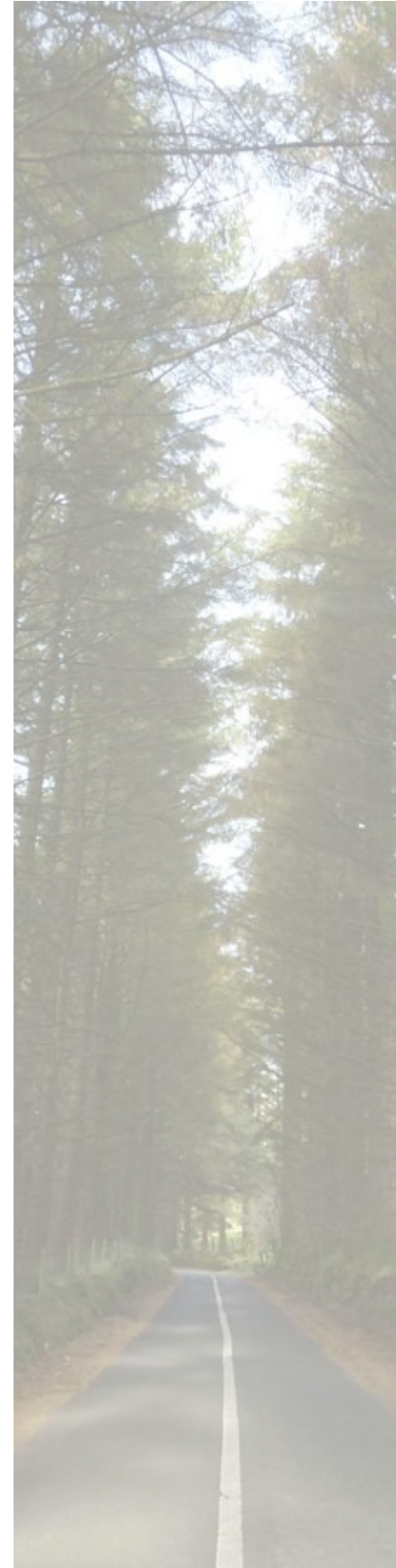
The aim of this project is to develop and then validate a brand proposition that will leverage the existing offering and create a framework for the 'Munster Peaks' area's future sustainable development and promotion in order that the consumer has a clear understanding and expectation of the experience they will have when visiting the inland mountains ranges of Munster, and that such experiences should be authentic, engaging, and memorable.

The Tender Document specified a programme of research and assessment comprising:

1. Examine the area/brand values, positioning, and products by:
 - Reviewing existing destination propositions to include the study region and the surrounding areas,
 - Reviewing product offerings and undertake SWOT analysis to determine their appropriateness to fit the brand,
 - Reviewing existing area studies carried out by SLR (Knockmealdowns & Galtees), Limerick Institute of Technology (Comeraghs), and Fáilte Ireland – and any others as appropriate,
 - Scoping out the opportunity around themes and how experiences can be brought to life, etc.,

- Consulting with the wide range of stakeholders for this project,
 - Agreeing Munster Peaks area/geography.
2. To undertake a review of research carried out by Fáilte Ireland, in order to:
 - Identify target segments within the primary key markets areas GB, Germany, France and the US and the Irish market,
 - Review existing research to define current potential and requirements of segments such as the car and coach touring markets, family and soft adventure markets should be examined as well as others,
 - Identify the segmentation of the walking market,
 - Identify the largest cohorts, their profile, needs and expectations,
 - Understand consumer needs and behaviour (across the key markets & segments) and how they want to consume this type of experience,
 - Examine relevant trends and benchmark against similar rural destination in principal competitor destinations and how they are marketed. A minimum of 2 case-studies should be produced as a result of this benchmarking exercise. Identify the implications the benchmarking findings have on the Munster Peaks project with appropriate action plans.
 3. Develop a compelling brand proposition that,
 - Has a clear vision, values and personality,
 - Engages tourists and generates a loyal following,
 - Clearly communicates the unique offering of the area,

- Identifies the tourism experiences which exist or need to be developed for the vision, value and personality of the Munster Peaks, meeting the needs of the visitor segments,
 - Helps to unify the businesses in the area,
 - Identifies components to motivate consumers,
 - Consistently links all aspects of the brand e.g. consumer promise, values and attributes, brand identity and personality,
 - Details options on the management of the Munster Peaks brand proposal by the relevant agencies involved. Identify who is the lead partner and the roles of the other invested agencies, namely, the local authorities, development companies and Fáilte Ireland. Identify the staffing resources needed and staff sourcing,
 - Details associated costs for the period of the plan, i.e. for a five year plan, the start-up investment required and yearly costs. Identify the funding sources for the areas of activity.
4. Undertake consumer testing of proposition (in key markets and with tour operators currently programming sections/elements of the destination) through,
 - Developing clear guidelines around the use of the brand (including possible sub-sets of the brand),
 - Outlining how the brand promise and core values will be maintained,
 - Specifying the marketing and management of the brand going forward,
 - Detailing the communications strategy for how the visitor will engage with the product from planning right through to experience.
 5. Assessment of short, medium and long term risks and identification of measures to minimize risks.



1.2 TDI Approach to the Brief and Methodology

There is increasing recognition, both within Ireland and internationally, of the need for quality recreational facilities delivering social, health and economic benefits. Tourism is continually evolving and the product offered must reflect this ever changing market. Visitors are becoming more discerning in terms of the places they wish to visit, the activities they wish to undertake and are acutely aware of the quality of the environment within which these activities take place.

Visitors, both international and domestic, take part in a wide range of recreational activities in, on and around Ireland's mountains and waterways. These resources also provide a visual amenity and in some cases have historical and cultural associations. They provide a resource for many people and in turn generate revenue for local communities and the wider economy.

Recreation activities associated with mountains, the valleys and rivers that run between them, and the lakes, range from walking, cycling, horse riding, heritage appreciation and bird watching as well as boating, angling, kayaking/canoeing and sailing in and on the waterways. Details of activity levels and trends are presented in Chapter 2. It is clear that demand for good quality outdoor recreational activities is growing but that, at the same time, the supply of facilities and amenities catering for the many segments and sub-segments that make up what might be termed activity and adventure recreation (i.e. from international, domestic and local sources) is equally expanding as the many areas with fine natural resources recognise and compete for the socio-economic benefits that can be gained from attracting participants in these activities.



There are a number of key trends which are likely to result in an increase in participation in recreation and activities associated with areas with rich natural environments and features. The nature of tourism is changing with visitors seeking a participatory experience rather than a passive vacation. Visitors are choosing holidays which give them a life enriching and rewarding experience. Tourists are also looking for holidays which offer them opportunities to keep fit and to learn new activities; both of which suit outdoor which take place in mountains and near waterways such as walking and cycling.

A consequence of the current economic downturn is that many Irish people are now taking their holidays at home. In addition some people are now making a conscious decision to take their holidays at home rather than go abroad to reduce their environmental impact. This combined with a new yearning for outdoor activities among many Irish people, such as hiking, kayaking and cycling, is likely to result in an increase in demand for activities in areas such as that of the four mountain ranges under review in this study.

Other key trends of relevance to outdoor recreation and tourism are the changing demographics of Europe. An ageing population, with 1100 million EU citizens over 65 by 2019, means an increased demand for softer adventure activities. Another impact of an ageing population is a growth in demand for activity holidays from those in their 40's with older children. Research for both Fáilte Ireland and Mintel suggest that walking, cycling and water-based activities are of particular interest to families. In 2011¹, Fáilte Ireland research showed that international visitors engaging in walking/hiking numbered 743,000 with expenditure of Euros 649mn, followed in terms of scale by overseas tourists engaging in cycling at 173,000 spending Euros 200 mn².

¹ *Tourism Activity and Adventure Forum, 2009, Fáilte Ireland Policy and Futures*

² *Adventure Experiences in Ireland: Some Facts and Insights, 2013, Fáilte Ireland Research and Insights*

In designing its research programme and approach TDI had regard to the work already undertaken and the models and methodology established by Fáilte Ireland, as well as the various strategic plans prepared for the mountain areas i.e.

- Comeragh Mountains Strategy, March 2013 – Comeragh Mountains Forum,
- Step by Step: a Walking Strategy for County Waterford, 2004, Waterford County Council,
- Galtee Mountains: Tourism Development Facilitation & Project Management, June 2011, Ballyhoura Development Ltd.,
- Recreational Strategy for the Knockmealdown Mountains, February 2011, South Tipperary Development and Tourism Companies
- Ballyhoura Attractions Cluster Development Strategy, March 2003, Ballyhoura Development Ltd.

Other reports and plans commissioned by the Local and Regional Authorities were examined, along with other relevant reports relating to the development of the mountain and inland waterways for recreational use and tourism development. A full listing of documents examined is given in appendix A2.

TDI consulted with OPW, National Parks and Wildlife Service, Environment and Heritage Services, relevant Local Authorities, Inland Fisheries Ireland, An Taisce, Community Groups, and as well as other key stakeholders as defined and agreed with the steering group established for the study.

In order to accommodate the full needs of the study, TDI undertook a five phase programme of research and analysis, concluding in the development of a vision, supporting proposition and phased implementation plan. The sequence leads from an overview of the relevant literature on outdoor recreation and strategic planning documents for the study area, and a record and assessment of the existing situation in respect of attractions, facilities and amenities, through to an examination of best practice both elsewhere in Ireland and internationally, to the identification and testing of the branding proposition for the area, and a phased plan of implementation.

The five-phase programme undertaken is illustrated below:

Figure 1 - A Phased Approach



1.3 Report Structure



This report is presented in two Parts (Part1 - Recreation and Tourism Context and Product Audit; Part 2 -Vision, Opportunities and Action Plan).

Following this introductory chapter, Part 1 contains three chapters. Chapter 2 (Recreational and Tourism Product and Demand) examines the mountain ranges of, and adjoining the study area, and their associated settlements, development of recreational and tourism products on and related to mountain areas, and the pattern and profile of demand for such products. These aspects are considered at international and national levels and related to the specific case of the study area.

Chapter 3 contains the detailed product audit and situation analysis for the study area considering the full range of recreational activities, the detailed maps for the different sections of the study area, a SWOT (strengths, weaknesses, opportunities and threats) analysis, and the pipeline and proposed projects on, and related to, the four mountain ranges constituting the study area.

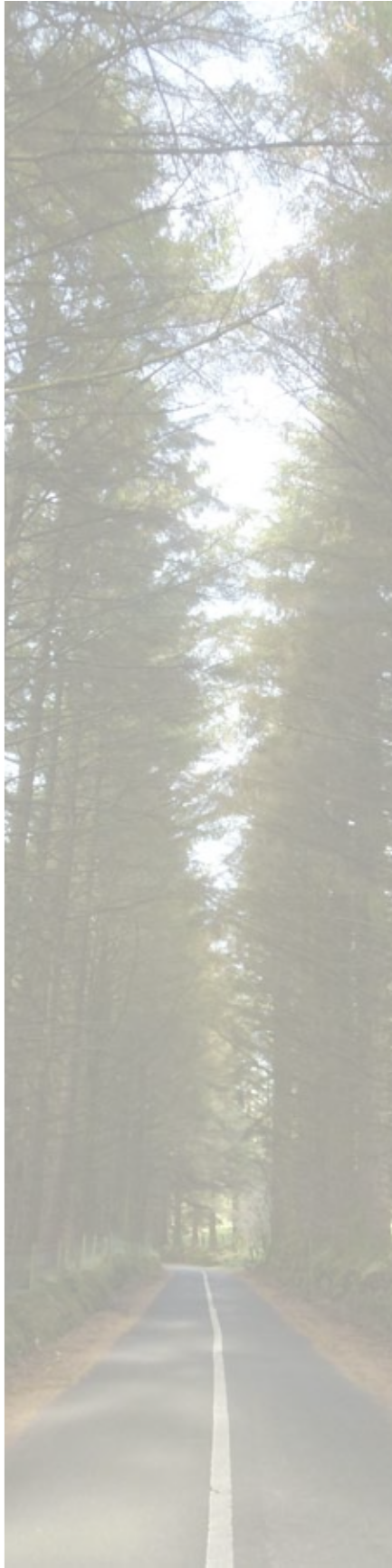
Chapter 4 outlines a number of examples of best practice in the UK, the USA and Europe in respect of rural areas (both mountain areas and others), specifically the institutional and financing arrangements involving areas with multiple administrations.

Part 2 contains three further chapters. Chapter 5 presents a guiding vision for the study area, and the brand proposition proposals arising from the detailed programme of research and analysis laid out in Part 1 . Much of the proposed development will be inter-dependent and marketing will need to be integrated between the administrations. The vision developed reflects this necessity for a partnership approach.

Chapter 6 contains the results of the consumer testing of the brand proposition for the study area, with the refinements to the initial proposition reflected and incorporated in the proposition proposals in the preceding chapter.

Chapter 7 draws together the many proposed opportunities in the form of a phased action plan with the key primary and support entities responsible for implementation identified.

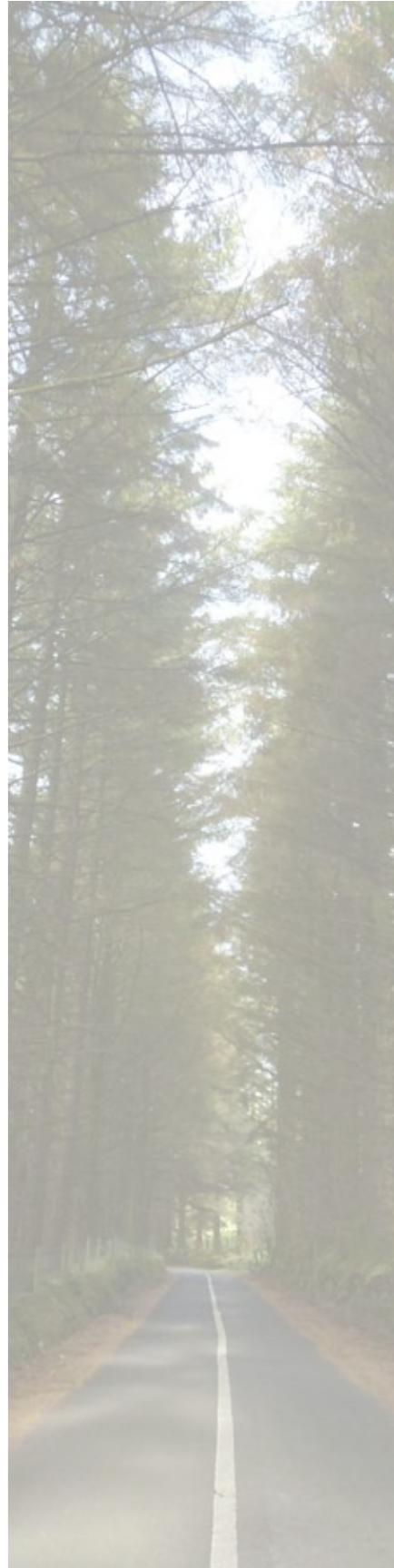
Details of the literature research, stakeholder consultations, product audit details and interpretation strategies and tools are given in a series of appendices.





Part 1:

Recreation and Tourism Context and Product Audit



CHAPTER TWO: RECREATIONAL AND TOURISM PRODUCT AND DEMAND

2.1 Study Area Overview

2.1.1 Location and Study Area Boundary

The study area spans four counties and covers 2,700kmsq or 270,000ha. The study area is shown on *Map 1: Study Area Context* and with more detail on *Map 2: Study Area Overview*. The area is characterised by rolling hills and uplands and verdant valleys with traditional farmland. While there are exceptional views from many of the mountain areas much of the heritage and attractions of the area lie within the valleys between them. For descriptive purposes, this overview discusses the study area in terms of each mountain area, including those valleys and towns that are in close proximity to each. These are shown on *Map 4: Mountain Areas*.

The proposed boundary for the study area as shown on Map 2: Study Area Overview was determined through analysis of transport hubs, the road network and physical geography of the area. The aim is to incorporate primary features, attractions and lines of visitor flow within a distinct area but without 'casting the net' too wide. It is considered that several towns and attractions outside of the primary study area have an influence and, for this reason, a secondary study area was identified – see *Map 3: Primary and Secondary Study Areas*.

2.1.2 Location and Study Area Boundary

The Ballyhoura Mountains are located in the south-east of County Limerick and the north-east of County Cork along the borders of both counties. The southern part of the gently rolling hills mainly consist of Coillte conifer forestry; the northern sides of healthland and blanket bog. The highest point is Seefin at 528m (1702ft). The lowland areas are characterised by traditional farmland and small towns and villages with great character and heritage such as Kilfinane, Kilmallock, Kildorrery, Ballyorgan, Doneraile, and Buttevant. Charleville is the largest settlement in close proximity to the Ballyhoura Mountains – synonymous with Charleville Cheese, produced from the dairy farms in the area.

Visitor attractions

The principal attraction on the upland areas is the Ballyhoura Mountain Bike Trail network. This purpose built trail network provides 90k of high quality trails, suiting all types of riders from novices to experts and is the largest trail network of its kind in Ireland. The five trails range from the moderate six kilometre Greenwood loop to the demanding Castlepook loop which can take 4-5 hours. The trail network was designed by Dafydd Davies, a recognised world expert in mountain bike trail design. The trails are located 2km south of Ardpatrik village off the R512. There is also a range of cycling trails on the lowland areas emanating from the Kilmallock Cycle Hub.

Around €500,000 is to be spent on the 2nd phase of a 3-phase project to upgrade Ballyhoura Mountain Bike Trails to become one of the premier mountain-bike facilities in Europe. This upgrade is to be completed before the staging the European Marathon Championships in June 2014. Visitor numbers are rapidly growing and Ballyhoura Fáilte Manager Fergal Somers indicates this could 'increase to 100,000 visitors over the next five years'.

Ballyhoura Forest Park offers visitors a wide range of trails including mountain bike trails, nature trails, orienteering trails, geo catching, fell-running trails, walking trails, a trim trail and horse-riding trails.

There is excellent walking in the area including the 89km Ballyhoura Way which runs from St John's Bridge in County Cork (west of Charleville) through County Limerick to Limerick Junction in County Tipperary to the north of Tipperary Town recreating part of the route of the O'Sullivan clan in 1602. The route includes part of the Ballyhoura Mountains and the southern flanks of the Slievenamuck Ridge, overlooking the Glen of Aherlow and with views to the Galtees. There are also a wide range of shorter loop and linear walks (see section 3.5.1 Hiking & Walking) including the Canon Shehan Loop Walk in the Glenanaar Forest on the south of the mountain, the Black rock Loop Walk and the Keale River Walk between Glenroe and Ballyorgan.

¹ <http://www.vsopublicationsltd.ie/2014/01/e500000-investment-planned-for-ballyhoura-trails/>

For the more adventurous the Beast of Ballyhoura Adventure Race takes place in August and includes mountain-biking, trekking, kayaking, swimming, rope work and orienteering over a 300km course.

The towns and villages surrounding the mountains have significant built heritage with great potential and opportunities for further development as heritage attractions. These include the spectacular mediaeval heritage of Kilmallock which includes the Dominican Priory constructed in 1291 and regarded as one of the finest monastery ruins in Ireland, King John's Castle, two town gates and the 13th Century Collegiate Church. Buttevant was Kilmallock's nearest medieval neighbour and is the only medieval walled town in north County Cork. Built heritage includes Buttevant Friary, Ballybeg Abbey, a range of castles and the old town walls. The attractive town of Doneraile includes Doneraile Court an OPW property, parts of which date to the 17th Century and which is currently being restored. The 166 hectares of gardens, with multi-access trails and deer herds, are an exceptional example of an 18th century Capability Brown style landscaped park; and the tea-rooms and playground make this an ideal family attraction.

There are a range of outdoor adventure activity providers in close proximity to the Ballyhoura Mountains. To the south is Blackwater Outdoor Activities, based on the Blackwater Castle Estate and also Galtee Valley Extreme Adventures based at Mitchelstown. To the east, Kilfinane Outdoor Education Centre offers a very wide range of soft and hard adventure activities. Ballyhass Lakes Activity Centre is to the south-west near Mallow offering a range of on and off water activities.

Promotion

In addition to Fáilte Ireland the Ballyhoura Mountain and the towns and villages surrounding it are promoted as part of the Ballyhoura Country by Ballyhoura Fáilte.

2.1.3 Galtee Mountains Area

The Galtee Mountains include Galtymore, at 919m/3009ft the highest inland peak in Ireland – i.e. not part of a coastal mountain range. The range, located within counties Limerick and Tipperary, has a distinct double summit along a high ridge which rises almost sheer from the surrounding plains. To the east of Galtymore is Galtymore (799 m) and to the west is Slievecushnabinnia (766 m). To the north of the Galtees the Glen of Aherlow is famous for the quality of walking routes and local walking festivals. During the last ice age the summits lay above the ice sheets and there is evidence of freeze and thaw glacial action on the rounded summits and there are five corrie lakes in cirques at the head of valleys formed by glacier erosion.

The countryside around the Galtees is famous for dairy farming and the Galtee food brand is now a highly successful part of the Kerry Food Group. Nearby towns include Tipperary to the northwest and Mitchelstown to the southeast.

Visitor Attractions

Visitor attractions in the Galtee Mountain area include Mitchelstown Caves, where visitors including groups can take a tour of the showcaves; Cahir Castle one of the largest and best-preserved castles in Ireland, constructed in 1142 by Conor O'Brien, Prince of Thomond and now managed by the OPW, as is Swiss Cottage near Cahir which was built around 1810 and now restored and open to the public. Cahir Castle is the second popular visitor attraction in the study area that supplies data to Fáilte Ireland and Swiss Cottage the 4th most popular, attraction making Cahir a hub for built heritage.



The Glen of Aherlow lies on the northern side of the Galty range and with Cahir to the east and Cashel to the north-east. This area is renowned for the quality of walking trails with a wide range of linear and loop walks (see section 3.5.1 for detail), walking clubs and walking festivals. Several of the Tipperary 10 walking routes are within this area and the 56km Tipperary Heritage Way running from Ardfinnan to Cashel passes to the east of the Galtee range. Kings Yard at Knocknagalty on the south side of the range provides a full range of services for all climbers and walkers in the area and is an ideal access point for a summit climb.

Promotion

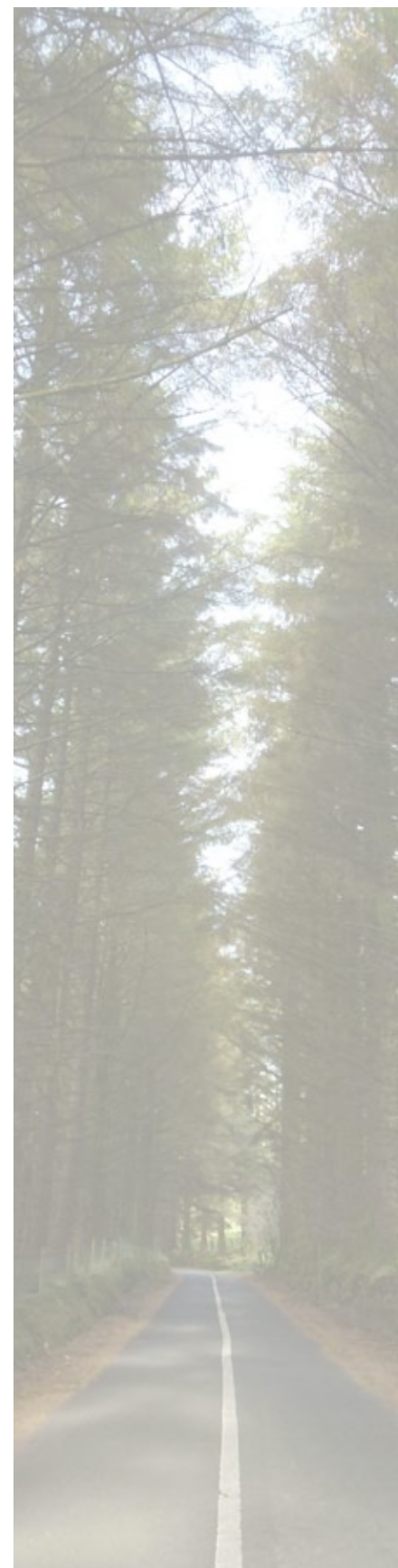
The area is promoted by Fáilte Ireland, Aherlow Fáilte on the www.aherlow.ie website, the www.visitcahir.ie website, the Galtees Recreational Steering Committee and by the South Tipperary Development Company.

2.1.4 Comeragh Mountains Area

The Comeragh Mountains are a spectacular range running from the coast near Dungarvan inland towards Clonmel. The range includes twelve distinct mountains with the highest peak, Fauscoum rising to 792m (2,598ft). The range includes some of the finest corrie lakes in Europe and the word Comeragh is derived from Coumarach which means 'full of hollows/glacial in origin).

Visitor Attractions

The east side of the range includes the scenic Mahon Falls which offers an excellent short family-friendly walk with expansive views over the Waterford countryside and out to sea. For the purposes of this study the Comeragh Mountains area covers the area south to Dungarvan and over to Bunmahon where the Copper Coast Geopark Visitor Centre is located. To the north Clonmel is a thriving town with a range of visitor attractions including the Main Guard and South Tipperary County Museum. Further to the east the medieval town of Carrick-on-Suir's attractions include Ormonde Castle and the Heritage Centre. Both towns have historic town walks, illustrating the wealth of historic heritage within them, and are linked by the Butler Trail.





The Comeragh Mountains offer some of the finest walking in the country. On the east side the Nire Valley runs deep into the range and is the principal access route for walkers and climbers. The Nire Valley car park at the head of the valley is the main start point for many walkers with walks ranging from short easy walks for beginners to multiple peak traverses from Clonmel to Dungarvan. There are some issues with break-ins to cars at the car-park. The Comeragh Mountaineering Club², established in 1975 and which now has a membership of 110, caters for the more adventurous with weekly Sunday walks of varying scales of difficulty. The Munster Way runs from Carrick-on-Suir along the Suir River to Kilsheelan, up into the foothills of the Comeraghs and down to Clonmel before running through the northern Knockmealdowns and down to Clogheen with spectacular views along the way.

As well as walking and cycling the Comeragh Mountains area is popular for angling with the Nire River a renowned game angling river popular for wild brown trout and salmon fishing. The Clonanav Fly Fishing School, Tackle Shop and Guesthouse is located nearby at Ballymacarby offering anglers one of the best facilities in the country.

Cycling is a popular activity in the area with the Comeragh Cycle Tour 100km challenge held in May. The Sean Kelly Tour of Waterford takes place in August and includes 12k, 50k, 100k and 160k routes with the shortest route, catering for families held in Dungarvan and the longest route covering the majority of the Comeragh Mountains Area – see Fig 2 beside.

Local festivals include the Nire Valley Walking Festival in October, the Comeragh Mountains Walking Festival and the Nire Valley Drop, a charity race for mountain-bikers. Guides provide visitors with local stories, information and lead walks for the less experienced. The inaugural Comeraghs Wild festival was held in south County Waterford in September 2013 and was a great success. This diverse festival included a mix of activities, poetry, traditional music and music and film with a focus on nature and adventure.

² www.comeraghclub.ie

Figure 2 - The Kelly Comeragh Challenge Route



The Comeragh Mountain area has strong community groups opposing the controversial proposed route for the Eirgrid's GridLink pylons which could run through the east of the area impacting upon the scenic views.

Slievenamon rises to a height of 721m (2365ft). It is known as the 'maidens mountain' and is famed in songs, poems, prose and the history of Ireland. On a fine day it provides a spectacular 360 degree view. Carrick-on-Suir and Clonmel lie to the south of Slievenamon and to the east is the medieval walled town of Fethard which has a historic town walk around its well-preserved walls.

Promotion

The area is promoted by Failte Ireland, Waterford & Tipperary County Councils, South Tipperary Tourism Company and Comeragh Mountains Forum.

2.1.5 Knockmealdowns Area

The rolling hills of the Knockmealdowns range straddle the Tipperary Waterford border. The highest of the ten peaks is Knockmealdown at 794m (2,605ft) in County Waterford. The range is easily accessible with the R668 road from Lismore to Cahir via Clogheen running through 'The Vee' the v-shaped gap in the mountains.

Visitor Attractions

The towns of Lismore and Cappoquin lie to the south of this area and are linked by the River Blackwater. Lismore Heritage Centre offers visitors a hub to discover places to visit in the area and for information on the nearby Lismore Castle.

The road network provides access to a range of walking routes including three way-marked ways – the 75km Munster Way running from Clogheen to Carrick-on-Suir; the Avondhu-Blackwater Way running from Clogheen east almost to Killarney (if the 94km Avondhu Way is combined with the 67km Blackwater Way); and the 56km Tipperary Heritage Way which runs from Clogheen to Cashel. The Tipperary Heritage Way follows the course of the River Suir and passes through Ardfinnan, Cahir and Golden before reaching Cashel. The

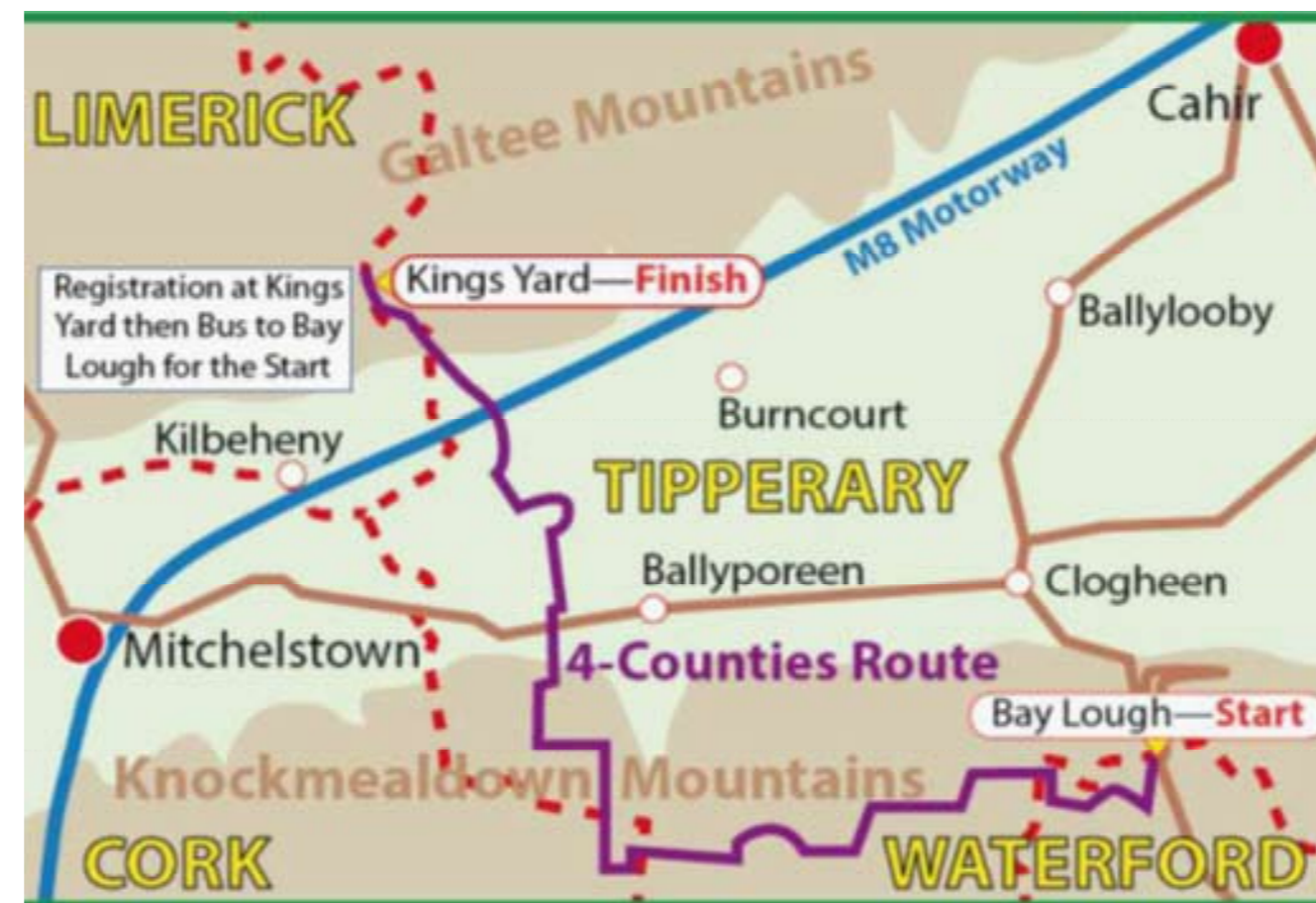
95km St Declan's Way route, following an old pilgrim trail from Ardmore to Cashel, was developed in the 1990's and was heavily promoted in 2013 with a St Declans Way walk held in July attracting 110 walkers as part of The Gathering.

Knockmealdown Active is organising a walk along part of the St Declan's Way from Goatenbridge, County Tipperary south to the Cistercian Monastery of Mount Mellary Abbey on the southern slopes of the Knockmealdowns on the 19th April 2014 as part of the National Pilgrim's Path Day.

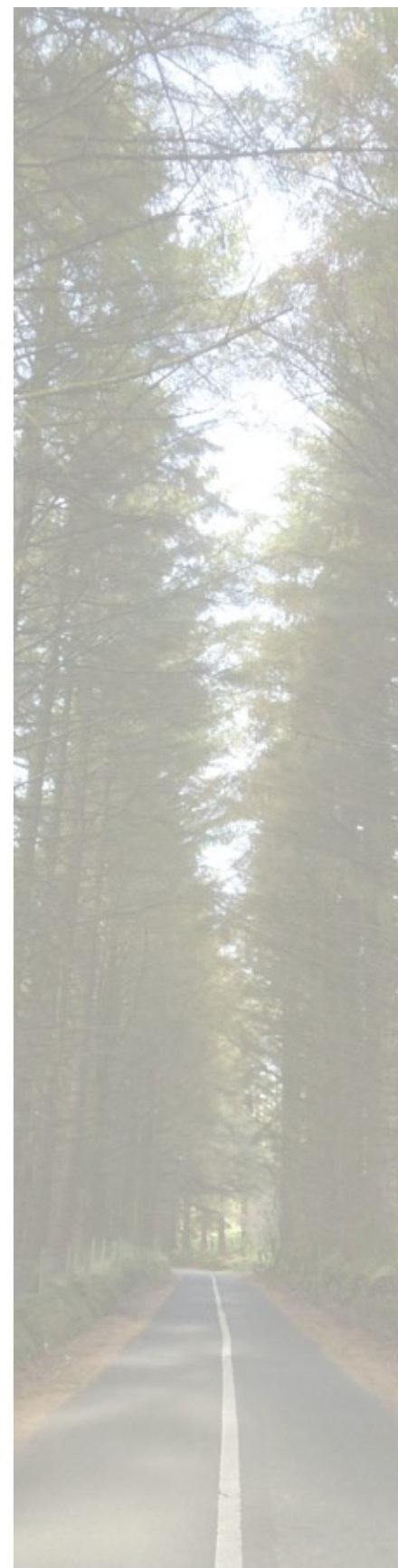
There are several activity based festivals in the Knockmealdowns area, including The Concern Four County Challenge charity walk which was held on the 31st August 2013 consisting of a 33km walk from Clogheen to Kings Yard in the Galtee Mountains. The Concern website indicates the route of the walk was chosen so as to reduce environmental impact on the fragile peatlands of the hills.

Local walking clubs include the Knockmealdown Ramblers which was formed by Knockmealdown Active and holds regular weekly walks on the mountains. Walkers use the town of Clogheen and Newcastle on the north side and Lismore and Cappoquin on the south side as a base for access to walks.

Figure 3 - Four County Challenge Route 2013



Source: www.yourconcern.concern.net/events/four-county-challenge





The area is also popular with a cyclists – the inaugural Tour of the Knockmealdowns cycling event took place in 2012 and was held in May in 2013. The event consists of a 90km main route and a shorter 40km route for those not wishing to cycle all the way and includes the towns of Clogheen, Ballyporeen, Newcastle, Goatenbridge and Ardfinnan.

The River Suir from Ardfinnan to Cahir is an exceptional angling area with Cahir designated an Angling Centre of Excellence. The river is popular with game anglers fishing for salmon and Wild Brown Trout.

Promotion

The area is promoted and developed by Fáilte Ireland, Knockmealdowns Active and Knockmealdowns Forum. Knockmealdown Active and Knockmealdowns Forum are community based initiatives promoting activity, trade and tourism.

2.1.6 Key Settlements

The study area covers a range of terrain and includes settlements of varying sizes. Table 1 below indicates the towns in close proximity to the mountains and their populations at the last census. The study area and settlements are shown on *Map 2: Study Area Overview*.



Table 1: Study Area Settlements and Population (2011)³

	Co. Cork	Co. Waterford	Co. Limerick	Co. Tipperary
Ballyhoura Mountain Area	Mallow (11,605) Fermoy (6,489) Charleville (3,672) Ballyhea (1,000) Buttevant (945) Doneraile (757) Glanworth (547) Castletownroche (435)		Kilmallock (1,635) Kilfinane (778) Ardpatrick Ballyorgan Glenroe Ballylanders	
Comeragh Mountain Area		Dungarvan (1,436) Kilmacthomas (871) Ballymacarbry Lemybrien Bunmahon Clonea Rathgormack Fenor Stradbally		Clonmel (17,048) Carrick-on-Suir (5,886)
Galtee Mountain Area	Mitchelstown (3,677)		Galbally Anglesborough Kilbeheny	Tipperary (5,065) Cahir (3,578) Bansha (349) Lisvarrinane
Knockmealdown Mountain Area	Kilworth (974) Araglin	Tallow (962) Cappoquin (759) Lismore (732) Millstreet		Clogheen (491) Ballyporeen Ardfinnan

³ CSO Census 2011



2.2 Tourism Overview

2.2.1 Responsibility for Tourism Development

There are a range of organisations responsible for the development, promotion and support of tourism within the study area. These comprise:

County Councils: Cork, Limerick, South Tipperary and Waterford who have specific policies within their county development plans regarding the development of the area;

Destination Management Organisations: e.g. Visit Ballyhoura;

Rural Development Organisations: e.g. Waterford Leader Partnership, South Tipperary Tourism Company;

Fáilte Ireland – targeted support for various activities as well as targeted promotion. Fáilte Ireland works in strategic partnership with the tourism industry and local authorities to help develop and sustain Ireland as a high quality tourism destination. The study area, for the purposes of this project, falls within Fáilte Ireland's South East Region (Cork), South West Region (Waterford South Tipperary) and Shannon Region (Limerick). Within these destination areas the relevant area offices and destination development teams within Fáilte Ireland's Dublin office provide a range of supports including:

- Developing product offerings for both the domestic and overseas markets and taking the lead in marketing Irish holidays and events to the domestic market
- Supporting local enterprise development, promoting best-practice in operations, quality and standards and facilitating investment in tourism infrastructure
- Facilitate improvements in human resource capability within the industry including training and standards.

2.2.2. Current Tourism Performance

Information supplied by Fáilte Ireland gives an **indication** of the volume of overseas visitors to the four counties that the study area spans and the revenue from those overseas visitors. This is not an accurate indication of the total number of visitors to the study area given the data cannot be subdivided into those section of each county covered by the study area. For example a relatively small area of County Cork lies within the study area boundary. In addition visitors may have travelled to more than one county within the study area on their visit. However while the data below is indicative it does enable some observations:

- Table 2 indicates overseas visitor numbers to all four counties rose over the 2010-2012 period.
- Table 3 indicating visitor revenue for the four counties over the three-year period shows the total revenue for Cork and Limerick peaking in 2011 before falling back in 2012. The data for Waterford and Tipperary South shows an increase in 2012 over 2011.
- Visitor numbers and revenue to County's Waterford and Tipperary South are low in comparison to Limerick and particularly to Cork. However this is difficult to compare given the scale of the attractions on offer in County Cork and the size of the county. The low figures for Tipperary South indicate few visitors venture inland emphasising the 'doughnut tourism' concept i.e. the coastal regions of Ireland benefit from visitors.
- **Revenue yield per visitor has declined in counties Cork, Limerick and Tipperary and most significantly in County Cork from €408/visitor in 2010 to €325/visitor in 2012. For County Waterford yield dipped in 2011 but rose again in 2012. (Table 3).**



- The GB visitor market is the most important source of visitors for all four counties, followed by Mainland Europe and North America. Visitor volume and the proportion of total visitors from the GB market increased in all four counties over the 3-year period from 2010 to 2012. Revenue from the GB market shows a strong growth in all four counties and particularly so in County Limerick where GB revenue grew from €24m in 2010 to €40m in 2012. It could be suggested that this is due to the success of Ballyhoura Mountain biking over the same period as well as other initiatives in the county.
- The Mainland Europe market has held relatively steady in all four counties, declining slightly in counties Limerick and Waterford over the period. However revenue from the Mainland Europe market declined in both County Cork and Limerick. In County Limerick the decline was by almost 50% from €58m to €30m cancelling out the revenue growth from the GB market. Revenue from the Mainland Europe market rose significantly in County Waterford from €11m to €15m over the period.
- The North American market declined slightly in Cork, Limerick and Tipperary and rose slightly in Co. Waterford. Revenue from the North American market rose in Cork, Tipperary and Waterford and declined in Limerick.
- **Overall visitor revenue rose in Cork, Tipperary and Waterford and declined in Limerick due to the fall in revenue from the Mainland Europe and North American markets.**

Table 2: Visitor Numbers to Study Area Counties 2010-2012 (000's)

County	2010	2011	2012
Cork	955	1,123	1,228
Limerick	333	383	391
Tipperary	101	116	124
Waterford	201	210	225

Source: Fáilte Ireland

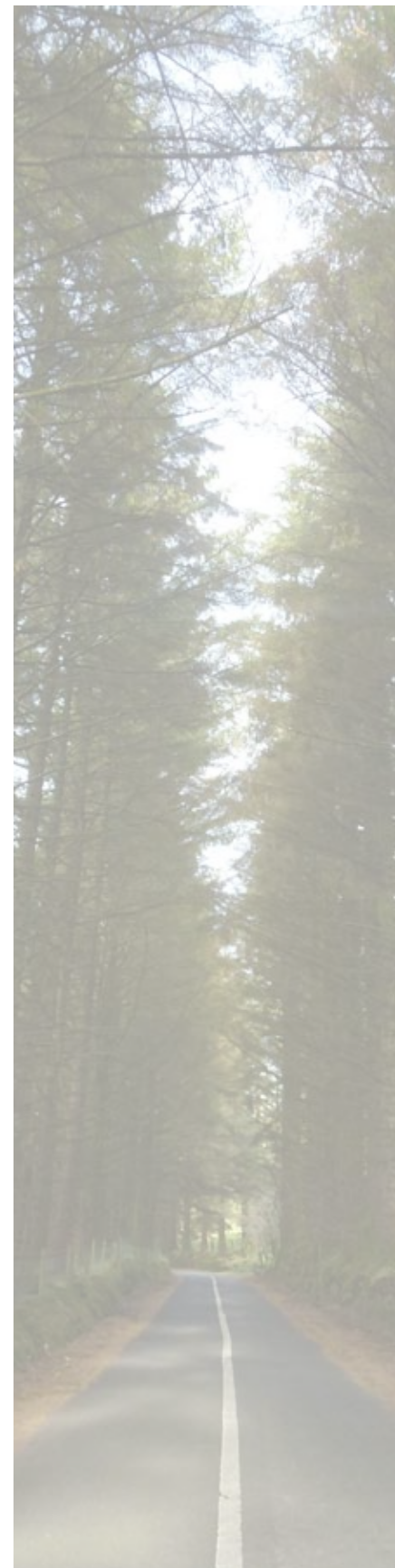


Table 3: Visitor Revenue for Study Area Counties 2010-2012 (€m)

County	2010	2011	2012
Cork	390	416	399
Limerick	134	143	116
Tipperary	38	38	39
Waterford	43	39	55

Source: Fáilte Ireland

Table 4: Yield Per Visitor for Study Area Counties 2010-2012 (€)

County	2010	2011	2012
Cork	408	370	325
Limerick	402	373	297
Tipperary	346	328	315
Waterford	214	186	244

Source: Fáilte Ireland

Visitors by Source Market

Table 5: Source of Visitors to County Cork 2010-2012 (000's)

Year	Total	GB	Mainland Europe	North America	Other areas
2010	955	345 (36.1%)	347 (36.4%)	201 (21%)	62 (6.5%)
2011	1,123	414 (36.8%)	399 (35.5%)	232 (20.7%)	78 (7%)
2012	1,228	499 (40.7%)	445 (36.2%)	221 (18%)	63 (5.1%)

Source: Fáilte Ireland

Table 6: Source of Visitors to County Limerick 2010-2012 (000's)

Year	Total	GB	Mainland Europe	North America	Other areas
2010	333	115 (35%)	119 (35.6%)	80 (24%)	18 (5.4%)
2011	383	143 (37%)	130 (34%)	95 (24.8%)	16 (4.2%)
2012	391	174 (44.5%)	117 (29.9%)	87 (22%)	14 (3.6%)

Source: Fáilte Ireland

Table 7: Source of Visitors to County Tipperary 2010-2012 (000's)

Year	Total	GB	Mainland Europe	North America	Other areas
2010	101	49 (48.5%)	25 (24.8%)	19 (18.8%)	8 (7.9%)
2011	116	47 (40.5%)	38 (32.8%)	26 (22.4%)	5 (4.3%)
2012	124	62 (50%)	33 (26.6%)	21 (16.9%)	8 (6.5%)

Source: Fáilte Ireland

Table 8: Source of Visitors to County Waterford 2010-2012 (000's)

Year	Total	GB	Mainland Europe	North America	Other areas
2010	201	68 (33.8%)	55 (27.9%)	53 (26.4%)	24 (11.9%)
2011	210	54 (25.7%)	76 (36.2%)	62 (30%)	17 (8.1%)
2012	225	82 (36.4%)	59 (26.2%)	62 (27.6%)	22 (9.8%)

Source: Fáilte Ireland

Visitor Revenue by Source Market

Table 9: Source of Visitor Revenue for County Cork 2010-2012 (€m)

Year	Total	GB	Mainland Europe	North America	Other areas
2010	390	109 (28%)	166 (42.5%)	97 (24.9%)	18 (4.6%)
2011	416	144 (34.6%)	136 (32.9%)	91 (21.9%)	44 (10.6%)
2012	399	127 (31.8%)	142 (35.6%)	110 (27.8%)	19 (4.8%)

Source: Fáilte Ireland

Table 10: Source of Visitor Revenue for County Limerick 2010-2012 (€m)

Year	Total	GB	Mainland Europe	North America	Other areas
2010	134	24 (17.9%)	58 (43.3%)	47 (35.1%)	5 (3.7%)
2011	143	36 (25.2%)	41 (28.7%)	62 (43.3%)	4 (2.8%)
2012	116	40 (34.5%)	30 (25.9%)	40 (34.4%)	6 (5.2%)

Source: Fáilte Ireland

Table 11: Source of Visitor Revenue for County Tipperary 2010-2012 (€m)

Year	Total	GB	Mainland Europe	North America	Other areas
2010	38	14 (36.8%)	14 (36.8%)	7 (18.4%)	3 (8%)
2011	38	12 (31.6%)	17 (44.8%)	7 (18.4%)	2 (5.2%)
2012	39	18 (46.2%)	14 (35.8%)	6 (15.4%)	1 (2.6%)

Source: Fáilte Ireland

Table 12: Source of Visitor Revenue for County Waterford 2010-2012 (€m)

Year	Total	GB	Mainland Europe	North America	Other areas
2010	43	21 (48.8%)	11 (25.6%)	8 (18.6%)	3 (7%)
2011	39	15 (38.5%)	11 (28.2%)	10 (25.6%)	3 (7.7%)
2012	55	19 (34.5%)	15 (27.3%)	11 (20%)	10 (18.2%)

Source: Fáilte Ireland

2.2.3 International Market Segmentation Analysis

Tourism and Fáilte Ireland have identified a range of market segments that are viewed as having the best prospects for growth in coming years.

2.2.3.1 Tourism Ireland Target Market Segmentation

Tourism Ireland has prioritised 'Sightseers & Culture Seekers' as the target segment in the priority overseas markets of GB, USA, France and Germany. In addition 'Scenic Relaxers' have been targeted within the GB market. Key features of these target segments are outlined below in Table 13.

Summary – Overseas Visitor Target Market

The '**Sightseers & Culture Seekers**'⁴ segment profile can be summarised as follows:

- They are from the ABC1 demographic and are older than average holiday makers – generally 35+, however the age profile of visitors from France and Germany

⁴ A Sightseer & Culture Seeker (S&CS) is someone for whom "exploring a country's sights and finding out about its culture" is the key motivator for going on holiday

- They are looking for authentic, engaging, enriching experiences and to connect with distinctive local culture
- What matters most to them on holiday is beautiful scenery, engaging with history & culture, experiencing local food, drink & cuisine, visiting historic houses and gardens, visiting natural attractions, meeting friendly local people & being made to feel welcome, exploring small towns & villages and enjoying traditional music & folklore. In addition safety & security and value for money are important considerations.
- While city-breaks are popular with many S&CS from each country, longer rural holidays are also popular and they tend to stay for longer (5-8 days for GB, 8-10 days for France, Germany, USA) when on rural breaks.
- GB, French and German S&CS visitors tend to use a car and to use a range of accommodation including hotels, guesthouses, B&B's and rented. Hotels are more popular with visitors from the USA.
- The majority travel during summer months (May-August) with implications for seasonality dependency and to favour the west and south-west.
- Internet, word-of-mouth and guide-books are the optimum methods of contacting these segments.

The '**Scenic Relaxer**' segment, targeted in the GB market, can be summarised as follows:

- Busy people who want an easy escape from everyday life.
- What matter most is relaxing, getting away from it all for an easy, stress free experience, spending quality time with family or a partner, value for money and safety & security.
- The longer rural holiday offering is more appealing to this GB group (approx 140,000) than to the GB S&CS (approx 100,000).

- Travel in the summer months and stay longer than the GB S&CS
- Prefer the south west and west regions.
- 80% on a repeat visit, 75% are 45+, majority married with dependent kids, travel either in a couple or with family, 80% use a car.
- Prefer rented accommodation.
- Internet and word of mouth a key means to contact these visitors.

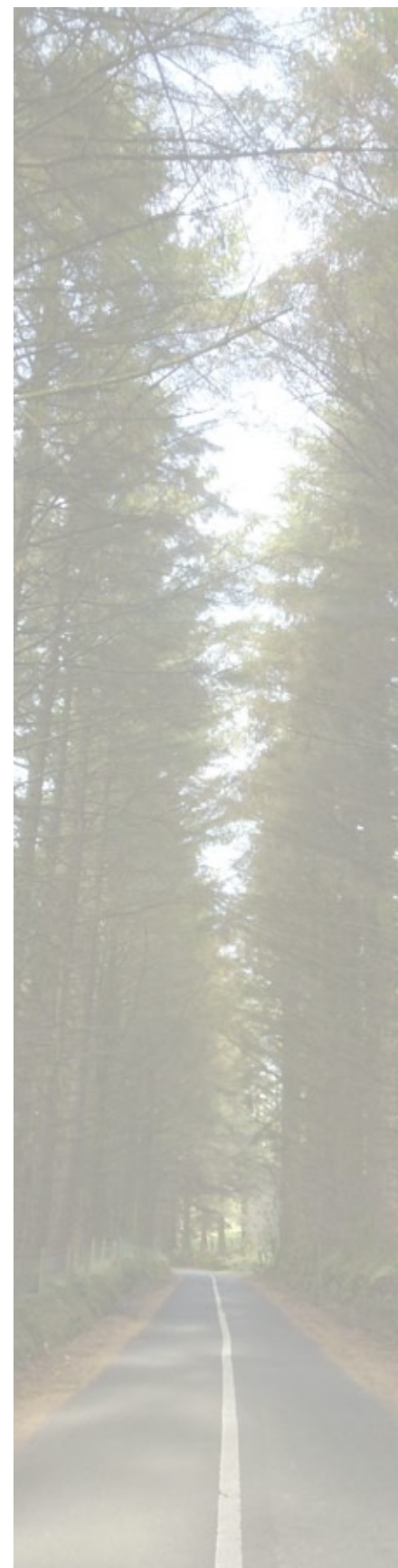
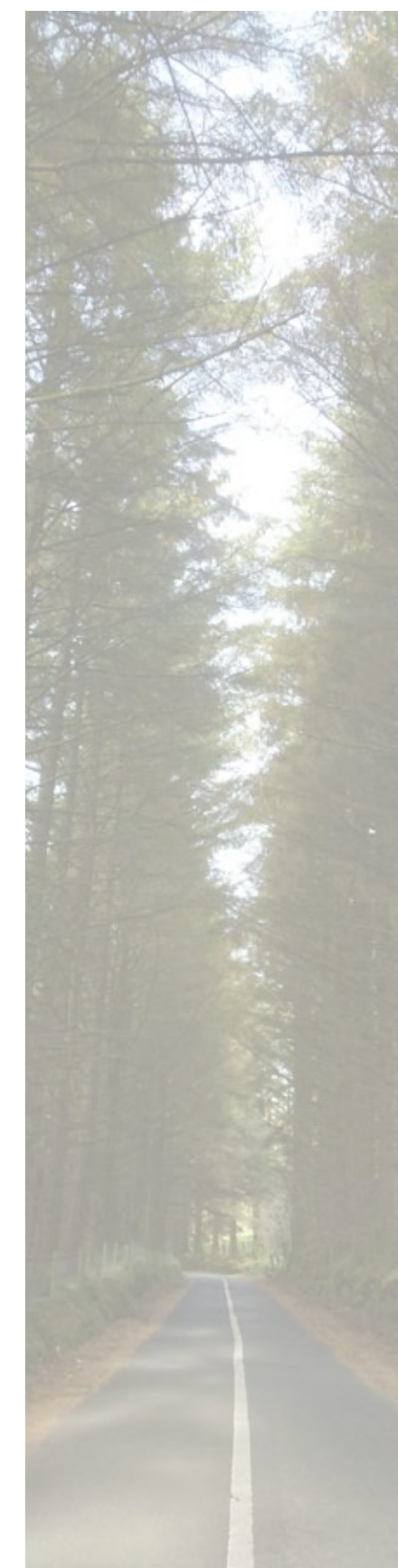


Table 13: Key Features of the ‘Sightseers & Culture Seekers’ (S&CS) and ‘Scenic Relaxers’ (SR) Target Markets

	GB SR	GB S&CS	France S&CS	Germany S&CS	USA S&CS
Who are they and what do they want?	<p>ABC1 C2 (<i>higher proportion in the C1 category than S&CS</i>), even gender split, even age split with a higher proportion at the 30-50 age group. Concentrated in London, the South East, the North West and the South West.</p> <p>Busy people who want an easy escape from everyday life.</p>	<p>ABC1 (56% AB), tend to be married, older 45+, concentrated in London, South East, North West & the South East. Take many short breaks.</p> <p>Exploration, engagement and authentic new experiences.</p>	<p>ABC1 socio demographic, tend to be married, older than the average French holidaymaker - predominantly 35+, Likely to live in the greater Paris region (37%) or in the West or South of France.</p> <p>They want authentic, enriching experiences and to immerse themselves in local culture.</p>	<p>ABC1 socio demographic, tend to be married, are older than the average German holidaymaker - predominantly 35+. Likely to live in Bayern, Nord-rhein – Westfalen and Baden – Württemberg. Are more likely to take additional short breaks than the average holidaymaker.</p> <p>They want authentic and engaging experiences and to escape from everyday life.</p>	<p>ABC1, college-educated Americans, tend to be older than the average outbound traveller, They tend to be married and are concentrated in cities across the States.</p> <p>They want authentic experiences to discover distinctive local cultures.</p>
What matters on holiday?	<p><i>Relaxing and getting away from it all for an easy and stress free experience are key holiday motivators as well as spending quality time with family or a partner. Value for money and safety & security are also key to this group.</i></p>	<p>Beautiful scenery and having lots to see and do are key considerations for S&CS, value for money and safety and security are important to the older S&Cs. While on holidays in general this group like to visit natural attractions and to experience local food, drink and cuisine. Exploring small towns and villages and visiting historic houses castles and gardens is also important. Getting under the skin of a destination is really important to this group</p>	<p>Beautiful scenery, engagement with history and culture, and friendly people are all important holiday considerations for French S&C's. Getting away from it all is also a key motive. They like to have stories to uncover and talk about and to come back feeling relaxed and refreshed. Experiencing local food/drink/cuisine, visiting natural attractions and exploring small towns and villages are all important activities for this group.</p>	<p>Beautiful scenery, open spaces, engagement with history and culture and safety and security (feeling welcome) are all important holiday considerations for German S&CS's. They want to come back feeling relaxed and refreshed. Like to visit natural attractions, sightsee in cities and towns and visiting historic houses and castles.</p>	<p>Beautiful scenery, having lots to see and do and safety and security are important factors for the US S&CS when considering holiday destinations. An authentic experience with local cultures is also a big driver as well as travelling with family and creating memories. They like exploring towns and villages, visiting natural attractions and historic houses, visiting national parks and gardens and enjoying traditional music & folklore.</p>

<p>How many visit and what do they do when they visit?</p>	<p><i>City Breaks very appealing to this group (Approx 150,000). In addition the longer rural holiday offering is more appealing to this group (approx 140,000) than to the S&CS.</i></p> <p><i>More concentrated in the Summer months and stay longer than the S&CS. South West and the West are the most popular regions. This group are loyal and 8 in 10 are here on a repeat visit. 3 out of 4 are 45+ and the majority are married with a significant proportion having dependent kids. They travel mainly in a couple or with their family. 8 in 10 will also use a car and the majority will base themselves in one region outside Dublin. Rented accommodation suits the needs of this group well.</i></p>	<p>Sub divided into Short City Breakers (approx 300,000), who are not the focus for this study and Longer Rural Holidays (approx 100,000) with the short city breaks recently more important for GB S&CS.</p> <p>The Longer Rural Holidays group tend to travel in the Summer months and stay between 5 and 8 nights. The majority visit the West and the South West. They are older than the average S&CS to the island and two thirds are here on a repeat visit. They tend to be married and travel in a couple or with their family. They are highly likely to use a car on their trip. Hotels, guesthouses and rented all popular with this group.</p>	<p>French S&CS make up almost 70% of all inbound French holidaymakers to the island (approx 140,000) - Our product matches their holiday need.</p> <p>French S&CS to the island stay an average of 9 nights. While the majority are here for the first time, a third are returning for a repeat visit due to the high levels of satisfaction they experience. They visit mainly in the Summer months and the West, in particular Connemara, holds special appeal for them. Using a car to tour around is very popular. Many stay in B&B's or guesthouses but hotels and self-catering are also popular. The island is attracting a younger S&CS in recent years with the majority under 45. Most travel with their partner but a significant proportion also travel with their family. City breaks are growing in popularity but there is an opportunity to grow even more.</p>	<p>German S&CS make up 76% of all inbound German holidaymakers to the island (approx 200,000) – Our product matches their holiday need.</p> <p>German S&Cs are long staying holidaymakers (10 nights approx) favouring Guesthouses & B&B's and mid - range hotels to luxury accommodation. They love touring the West and South west and tend to visit in the May – August period. They tend to be aged 35 + but and increasing number of 25-34yr olds are visiting. They travel mainly in couples and rarely bring children. They enjoy both city breaks and longer holidays with many of them combining both. They enjoy the freedom that a car will give them while touring the island.</p>	<p>Almost 80% of inbound US holidaymakers are Sightseers & Culture Seekers (approx 450,000)</p> <p>US holidaymakers stay an average of 8 nights on the island and travel mainly in the Summer months. As it is the first visit for many the majority will spend some time in Dublin and tour the regions also. Hotels are very popular with American S&CS. They are younger than the average US S&CS and are more likely to be female, they tend to not have dependent kids but will travel with their family (grown up kids or grandkids). The majority will take in urban and rural experiences.</p>
<p>How do I reach them?</p>	<p><i>As the island is so well known to GB holidaymakers a high proportion use the Internet for choosing, planning and booking their holiday. Word of mouth is also key as almost everyone knows someone who has been to Ireland.</i></p>	<p>As the island is so well known to GB holidaymakers a high proportion use the Internet for choosing, planning and booking their holiday. Word of mouth is also key as almost everyone knows someone who has been to Ireland.</p>	<p>Word of mouth both on and off line is key for French S&CSs when choosing and planning holidays. In recent years the use of blogs and review sites has also greatly increased. Newspapers and magazines are widely read in France.</p>	<p>Word of mouth is key for Germans S&Cs when choosing and planning holidays. While Germans were late adopters, the Internet is now the key tool for planning holidays and a significant portion still use travel agents. Guidebooks are still very popular in the German market.</p>	<p>Word of mouth, the Internet and guidebooks are key sources of holiday inspiration for this group. When it comes to planning their holiday the Internet is again key but 3 in 10 still use a travel agent.</p>

Source: Tourism Ireland (our emphasis)





2.2.3.2 GB Path to Growth Target Segments

In response to the collapse of the inbound GB visitor market the GB Path to Growth report was produced in 2011 by Fáilte Ireland, ITIC, NITB and Tourism Ireland.

The report divided the British market into seven groups of potential visitors. This model of segmentation focuses on motivation-based segmentation based on the question: 'Why am I taking a holiday and how do I want it to make me feel, both during and after?' Further research to assess which of these seven held the best prospects for driving growth identified three promising segments:

- **Social Energisers** (young, fun-loving urban adventurers)
- **Culturally Curious** (over 45s who want to broaden their minds)
- **Great Escapers** (younger couples who want to get away from it all).⁵

These three segments are likely to be the **key GB target markets for the study area**.

Another segment identified in the report likely to be attracted to the tourism and recreation products offered by the study area include the 'Top Tanners' who are seen as being younger with families who tend to be active on holiday, looking for fun and things to occupy the children. A recent Fáilte Ireland⁶ report regarding tourism trends showed that, in the first 6 months of 2013 the mix of GB visitors to Ireland by target segment was:

- **45% Top Tanners**
- **19% Social Energisers**
- **16% Culturally Curious**
- **8% Easy Going Socialisers**

⁵ GB Path to Growth, 2011, page 5. The other four segments are the 'Top Tanners', 'Easy Going Socialisers', 'Nature Lovers' and the 'Spoil Us' segment.
⁶ Fáilte Ireland 'Recent Trends & Top Line Performance, February 2014

- **6% Nature Lovers**
- **3% Great Escapers**
- **3% Spoil Us**

The report outlines the wider strategic approach where a brand structure was adopted for the island of Ireland with tourism assets grouped under this overarching brand. Assets were grouped by experience rather than by geography or holiday type. The four key experience types that held the greatest potential for motivating holiday makers were identified as:

- **Vibe of the City** – fresh, exciting and stimulating experiences and attractions in a lively atmosphere
- **Living Historical Stories** – interesting and informative experiences and attractions in urban and rural areas
- **Awakening the Senses** – stimulating and profound experiences within natural and unspoiled landscapes
- **Getting Active in Nature** – revitalising and energising experiences and activities in the spectacular outdoors.⁷

A targeted communication strategy is considered essential to the overall success of the programme, thought to be capable of driving growth of the GB market by 200,000 additional annual GB visitors during 2013-2016. The report recommends the tourism industry adopts the new market segmentation and reflects it in product bundling and communications programmes. The report outlines a new trade channel strategy to enable the tourism trade to make the best use of the four main channels to market in Britain: direct, online travel agencies, tour operators and tourism agencies.

A segmentation based marketing approach is outlined which indicates that:

⁷ GB Path to Growth, 2011, page 5

*'For both Social Energisers and the Culturally Curious, broadcast (TV, outdoor and cinema) can be important, although in a much more focused and narrowcast way than before. Digital and social channels will be key for Social Energisers, whilst press partnerships and sponsorship will play an important role for the Culturally Curious. For the Great Escapers, word of mouth, social media and online activity will be important. They may also be reached through some of the advertising aimed at the Culturally Curious. Use of PR and publicity will also be critical for this group.'*⁸

Given the importance of the GB market to the four counties that make up the study area, the stimulation, attraction and targeting of visitors from Britain is of great importance and this report provides essential guidance in that area. The report identifies the most relevant experience types and proposition for each target segment. These are summarised in Table 14 below.



⁸ GB Path to Growth, 2011, page 27

Table 14: Experience Propositions by Target Segment and Experience Type⁹

Target Segment	Experience Type	Proposition
Social Energisers	Vibe of the City	For people who are seeking fun and excitement, immerse yourself in Dublin, Belfast and our other great cities' energetic vibe for the whole weekend. You can really be at the heart of things, day and night. Get involved in the extraordinary day-time experiences and adventures inside the city and close by. And later, enjoy the unique atmosphere of our night-time experiences.
Culturally Curious	Living Historical Stories Awakening the Senses	For people who like to broaden their minds, immerse yourself in the fascinating discoveries you can make about Ireland's rich and diverse history and culture. Be exposed to our different way of seeing the world, and find out how we bring it all to life. These inspiring and interesting experiences are all within easy reach of each other.
Great Escapers	Living Historical Stories Getting Active in Nature	For explorers, escape your day-to-day routine and immerse yourself in Ireland's beautiful scenery and nature, to escape your day to day routines. Reconnect and bond with your loved ones and enjoy our outstanding natural phenomena and unrivalled historical sights. It couldn't be easier or more accessible than in Ireland.



⁹ GB Path to Growth, 2011, page 19

The report outlines further detail regarding the proposition for each target market segments¹⁰:

Social Energisers

This segment wants action-packed days as well as fun-filled nights. It wants to be able to access both within a short time and with the minimum of hassle. The island of Ireland needs to offer a combined focus on 'Extraordinary Days' and 'Happening Nights'. We should consider 'City Plus' experiences, which combine opportunities for adventure in the city and close by. This segment does not see any other European city as offering this, but does not know that Dublin and Belfast can. Packaging experiences in this way would be 'new news' and would motivate these holidaymakers to book.

Key words: Excitement; energy; fun and laughter; adventure; spontaneous; social; the wow factor.

Focus: Entertainment; festivals; contemporary culture and music; clubbing; unique tours; comedy; water sports; the pub experience; shopping; sightseeing; the local scene.

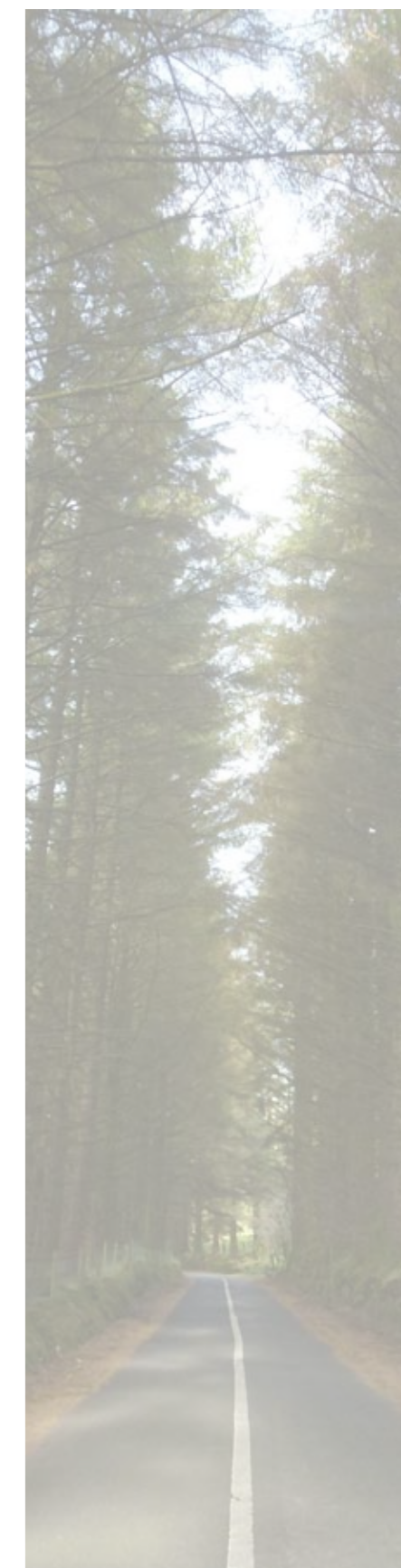
Culturally Curious

These holidaymakers want to immerse themselves in the island of Ireland's culture and discover it for themselves. The island can give them a rich set of experiences that bring history and culture to life. They want to be able to 'do' a region of the island of Ireland easily. We can facilitate this by marketing 'discovery centres' or 'epicentres' of products and experiences, such as the Burren or the Giant's Causeway. We will focus on creating a narrative that will cluster these nearby experiences into a small number of key propositions, e.g. the Wild Atlantic Way. To appeal to this segment, we need to significantly improve the interpretation and animation of epicentres and heritage sites.

Key words: Curiosity; authenticity; insight; independence; immersion in culture; off the beaten track.

Focus: Broadening the mind; exploring new areas; active sightseeing; historical buildings and attractions; gardens; galleries; literary tours; World Heritage sites; visitor centres; local festivals and events; artisan food.

¹⁰ GB Path to Growth, 2011, page 18





Great Escapers

Holidaymakers in this segment want to get away from the stress of a busy life and retreat to a relaxing rural environment. The experience offering needs to deliver very attractive and easily accessible experiences to this segment. We have to emphasise the island of Ireland has experiences which offer stunning immersive natural phenomena and architecture within a short distance. We also need to develop geographical hubs that cluster together a range of integrated outdoor activities. This segment can also be attracted by the establishment of national parks as centres of recreational activity, with trailheads offering amenities for various activities, along with maps, guides, food and drink, and secure parking. In the short term, we will focus on those in this segment who are not seeking family activities.

Key words: *Slow travel; relaxation; rebalancing; taking stock; getting away from it all; connecting with family.*

Focus: *Breath-taking landscapes; ancient sites; remote places; landmarks; restaurants offering fresh, local food; authentic pubs.*

While these three segments are Fáilte Ireland's core target market for Ireland the Top Tanners segment is thought to offer potential and TDI considers this segment may offer potential for the study area if the area can be sold as an attractive package. Fáilte Ireland¹¹ describes the Top Tanners as:

- Typically in their early 30s with 2 children
- Only goal on holiday is to enjoy it together
- Want a fun, sociable holiday with plenty to do, don't want to be bored
- Tend to take a 'traditional' long single summer holiday, most likely in the sun



¹¹ Fáilte Ireland, GB Connect: A Tourism Toolkit

Summary – GB Target Market

The two target segments in the critical GB market with the greatest potential for the study area are the 'Culturally Curious' and the 'Great Escapers' for whom the attributes of the study area are most likely to meet their requirements and satisfy their expectations. This includes scenic landscapes, significant built and cultural heritage, gardens, art galleries, food & craft, festivals & events and the opportunity to 'get away from it all' and have an authentic Irish rural countryside experience.

The Social Energisers segment provides an opportunity for the provision of 'Extraordinary Days' in close proximity to urban centres e.g. Cork, Waterford, Limerick, Kilkenny and Dublin. Finally for the GB market the 'Top Tanners', family groups looking for an active holiday with shared experiences are a key market from the, making up 45% of visitors to Ireland in the first half of 2013. This market may have potential for the study area if the right experiential package can be developed and promoted.

2.2.3.3 Tourism Ireland Brand Model 2014

Tourism Ireland recently updated their brand model which now reflects the GB target segmentation¹². TDI have been given a preview of this model which includes the following elements:

The '**Brand Promise**' or Ireland describes what Tourism Ireland was brand Ireland to stand for to enable the country to stand out in a competitive environment. This is stated as'

'Ireland is full of authentic, engaging experiences'

It is made up of '**Experience Pillars**' that deliver the brand promise including:

- **Living Historical Stories:** Discovering authentic stories in towns, villages and spectacular scenery that bring Ireland's living history and unique culture to life
- **Awakening the Senses:** Stimulating, natural, multi-sensory experiences created by dramatic settings and unspoilt landscape

¹² Tourism Ireland, Ireland's Brand Model, 2014

- **Active in Nature:** Connect with nature through revitalising activities and experiences in spectacular landscapes and scenery
- **Vibe of the City:** Engaging, distinctive and stimulating day and night-time experiences in vibrant towns and cities
- **Connecting with the People:** Getting under the skin of the place through authentic, engaging experiences with the locals

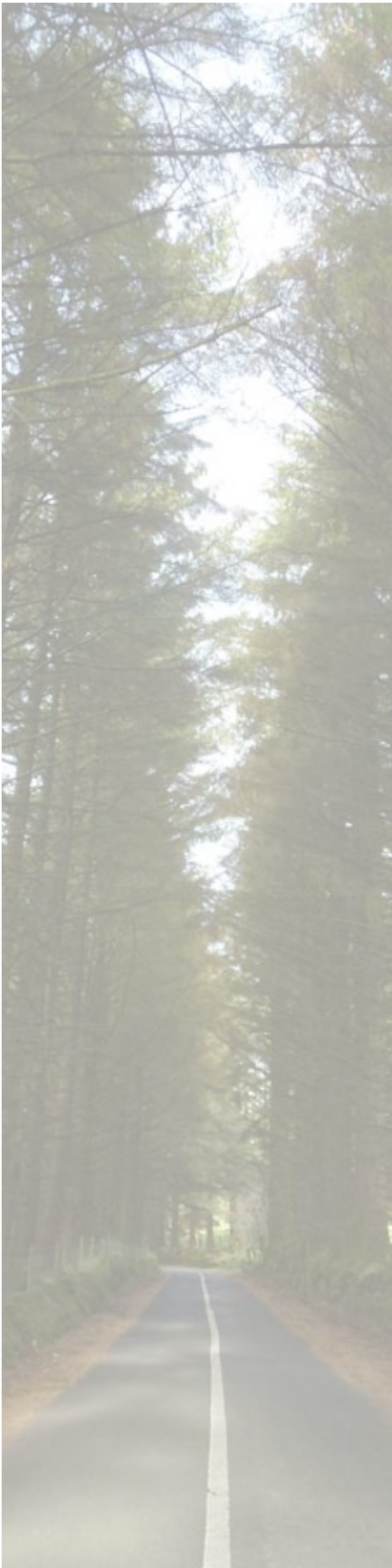


The market segmentation attached to this new brand model includes Culturally Curious, Social Energisers and Great Escapers.

Culturally Curious	Social Energisers	Great Escapers
Want to soak up authentic insights into new cultures, history and landscapes which are different. Don't follow the herd, prefer self-directed rich discovery.	Want fun-packed social adventures, and new experiences. They want lots of spontaneous, vibrant things to do, with a wow factor. They want to be at the heart of the action, in a lively atmosphere, day and night.	Need time out from busy lives to reconnect with each other, sharing quality down time, off the beaten track. They want stunning natural settings, and to be able to get away from it all in a low effort way.
Want to feel: Connected with a place, to have their minds stimulated	Want to feel: Stimulated, excited, energised (not rested)	Want to feel: Connected to nature and their loved ones. Refreshed, revitalised, batteries recharged
Where? Places of cultural interest, world heritage sites, villages, forts	Where? Wherever the action is; cities, towns, music venues, Irish pubs, festivals	Where? Places of scenic interest
Who with? Partner	Who with? With group of friends or partner	Who with? Loved ones – no need for anyone else

Market Variations

GB	US	France	Germany
Priority Segments & Pillars	Priority Segments & Pillars	Priority Segments & Pillars	Priority Segments & Pillars
1. CULTURALLY CURIOUS – Over 45s, couples, no children with them – Living historical stories 2. SOCIAL ENERGISERS – Under 35, with partner or group of friends – Vibe of the city. Extraordinary daytime & iconic night-time – Primarily city-break travellers	1. CULTURALLY CURIOUS – Baby boomers 45+ – Mature 55+ couples, no children – Juxtaposed Living historical stories/Vibe of the city 2. SOCIAL ENERGISERS – 25–35 years, couples or group of friends – Juxtaposed Living historical stories/Vibe of the city – Will travel in shoulder & off season	1. CULTURALLY CURIOUS – 45+ couples and other adults – Living historical stories and Awaken the senses (through breath-taking nature) 2. GREAT ESCAPERS – 25–45 – Awaken the senses (through breath-taking nature) and Living historical stories 3. SOCIAL ENERGISERS – 35–45, Vibe of the city +	1. CULTURALLY CURIOUS – 35–55 couples or adult friends – Living historical stories and Active in nature 2. GREAT ESCAPERS – 25–35 – Active in nature and living historical stories 3. SOCIAL ENERGISERS – 25–35, Vibe of the city +
MARKET DIFFERENCE Single pillar focus	MARKET DIFFERENCE Need to fill a longer stay, wide variety of experiences	MARKET DIFFERENCE Greater interest in culture	MARKET DIFFERENCE Want more active experiences





Tourism Ireland give an example of implementation of this brand architecture framework where, in the context of a wider brand positioning of 'Joyful Immersion', the most appropriate key pillar for the Culturally Curious segment would be the living Historical Stories' experience pillar which is suited to their description as 'For people who want to soak up authentic insights into new cultures, history and landscapes which are different. They don't follow the herd, but prefer self-directed rich discovery.' For this segment a Motivating Iconic Experience (MIE) might include the Rock of Cashel.

It can be seen that this new brand model brings the international segmentation into line with the GB target market segments. TDI recommend that the Culturally Curious and Great Escapers segments should be the core market focus for the study area given the attributes of the area are likely to have the greatest to appeal to these visitors.

2.2.3.4 Coach Tourism Research

Fáilte Ireland published research on coach tourism in 2013¹³. Key finding include:

- *There were 283,000 overseas coach tourists to Ireland in 2012 contributing an estimated €214 million to the Irish economy.*
- *While overall coach tourist numbers remained unchanged on 2011 American numbers have continued to improve since 2009 to reach just under 150,000 in 2012. Coach tourists from Britain have declined since 2009 and were down to 30,000 in 2012. Visitors from Mainland Europe and Other Areas have remained steady over this period.*
- *Travel agents were the main source of information for those planning a coach holiday to Ireland with 68% using these services; internet was the next most used resource at 37%. This is in contrast to other holidaymakers who rely primarily on the internet to access information for planning.*

¹³ Fáilte Ireland, Coach Tourism 2012 – An overview of overseas coach travel to the Republic of Ireland in 2012, November 2013

- *Thirteen per cent of coach tourists made their reservations up to 4 weeks before travelling with the majority making their reservations more than 4 weeks in advance. Of those who made their reservations at least 4 weeks or more in advance, 8% were made in the last quarter of 2011 with over half being made in the first quarter of 2012. Just 6% of reservations were made in the last 6 months of the year.*
- *Dublin was the most visited region with over 80% of overseas coach tourists spending at least one night in Dublin. Outside of Dublin, the South West and the West were the next most popular destinations for coach tourists. Not surprisingly coach tourists from North America predominate in the regions.*
- *Hotels were by far the most popular type of accommodation, accounting for 83% of coach tourist nights. Nine per cent of accommodation nights were in guesthouses/B&Bs and 5% were in hostels.*
- *The average length of stay for a coach visitor in 2012 was 8.2 nights. North Americans stayed longest on average 9 nights, and British visitors had the shortest stay at 5.7 nights.*
- *Most coach tourists (94%) visited places of cultural/historical interest. Visits to national parks/forests (57%) and gardens (51%) were the next most popular activities. Cultural events/festivals were attended by 11% of visitors. Of the more active pursuits hiking/hill walking was the most popular with 8% engaging in this activity.*
- *For most visitors (79%) it was their first trip to Ireland while for a fifth it was a repeat visit. Just 1% of visitors were Irish born.*
- *Coach tourists were most likely to travel in a couple (41%) or with an adult group (30%). Almost one in five travelled alone and one in ten travelled in a family group.*
- *The age profile for visiting coach tourists tended towards the older age groups with almost half (48%) aged over 54 years.*

- *Over half (57%) of those on a coach tour to Ireland were white collar workers (C1) with over a quarter (29%) coming from the managerial/professional class (AB).*

Summary – Coach Tourism

While the UK coach market has declined, the Mainland Europe and Other Areas coach markets have remained steady and the North American coach market is buoyant with over 150,000 visitors from North America travelling by coach in 2012. The majority of these visitors stay in hotels and visit places of cultural and historic interest. Many also visit national parks/forests and gardens on their trip. This provides an opportunity for the study area in the development of itineraries involving hotels, historic sites & gardens in the area.

2.2.4 Domestic Market Analysis

2.2.4.1 Fáilte Ireland Research 2012

Fáilte Ireland published research on domestic tourism in 2013¹⁴. Key findings include:

Numbers & Revenue

- *In 2012, just over 7 million trips were taken by Irish residents within the Republic, with an associated expenditure of €1.3 billion – this represents a decrease of 2% in trips on 2011 while expenditure declined by 5%.*
- *Domestic holidays were down by 9% to 3.4 million trips on 2011, with holiday revenue also declining by 9% to €785 million. Short holidays (1-3 nights) decreased by 2% to 2.6 million trips, while holidays lasting 4 or more nights were down by 25% to 780 thousand trips. Expenditure on short (€494m) and long holidays (€291m) was down by 4% and 17% respectively.*

¹⁴ Fáilte Ireland, Domestic Tourism 2012 – An overview of Irish residents' travel within the Republic of Ireland in 2012, October 2013

- There were 322,000 domestic business trips (-8%) taken in 2012 with an associated spend of €76 million (-2%). Visits to friends/relatives accounted for 2.4 million trips (+6%) and an expenditure of €270 million (+1%).
- Sixty-five per cent of Irish residents took a domestic holiday in 2012 – up 8 percentage points on 2011. The incidence of short trips (1-3 nights) rose by 5 percentage points at the expense of longer (4+ nights) which declined by 2 percentage points.

Booking

- Twenty-two per cent of holiday bookings were made a few days in advance with 27% made 1-2 weeks in advance, resulting in almost half of all bookings occurring 2 weeks before taking the trip.
- Forty-seven per cent of respondents used the internet to book their holiday, while phone and email were used by 40% and 11% respectively.

Destination

- The South-West was the most popular holiday destination for Irish residents in 2012 accounting for 22% of all holiday trips taken. The South East (18%) was the next most popular destination followed by the West (16%).
- In line with holiday trips the South-West region (27%) accounted for the highest percentage of holiday nights in 2012. The South East was next with 18% followed by the West which had a 17% share.
- Twenty-six per cent of total domestic holiday expenditure was spent in the South-West, while the West and the South East contributed 18% and 15% respectively to total holiday spend.

Accommodation & Transport

- Hotels provided 39% of holiday bednights in 2012. Rented accommodation accounted for 18% while holiday homes and staying with friends/relatives each accounted for 13%.

- Most holidaymakers (84%) used a private car to travel on holiday. Intercity train & bus services were used by 11% and 8% respectively. Taxi usage which reached a high of 19% in 2009 was down to 10% in 2012.

Demographic

- Domestic holidays prove more popular in older age groups - those aged 40 and over took just under two-thirds of all holiday trips in 2012.

Season

- July-September are the peak months for domestic holidays accounting for 41% of all domestic holidays in 2012. Sixty-one per cent of long holidays were taken during these months in 2012, compared with 36% of short holidays which have a more even spread throughout the year.

Pursuits & Activities

- Visiting national parks (23%) and houses/castles (22%) were the most popular leisure pursuits for domestic holidaymakers while hiking/walking (22%) and water-sports (22%) were the most popular active pursuits. Visits to a spa (20%) are important aspects of a domestic holiday break while 18% and 17% visited heritage/interpretive centres and/or gardens respectively.

Satisfaction

- Thirty-three per cent of holidaymakers considered value for money as very good with 53% rating it good. Just over 1% were dissatisfied with the value for money on offer.
- Ninety-eight per cent of domestic holidaymakers reported being satisfied with their holiday in Ireland in 2012 with just 2% registering dissatisfaction. Of those who were satisfied, 77% reported being very satisfied with 21% being fairly satisfied.

- Avoiding the inconvenience of air/sea travel (38%) is the advantage most often cited for holidaying in Ireland. Having lots of things to see & do (17%) and being less expensive than going abroad (14%) are the next most important advantages given.
- When it comes to the disadvantages of holidaying in Ireland poor weather (63%) has an unassailable lead. After weather, the cost of accommodation (30%), food (27%) and attractions (12%) are felt to be too high.

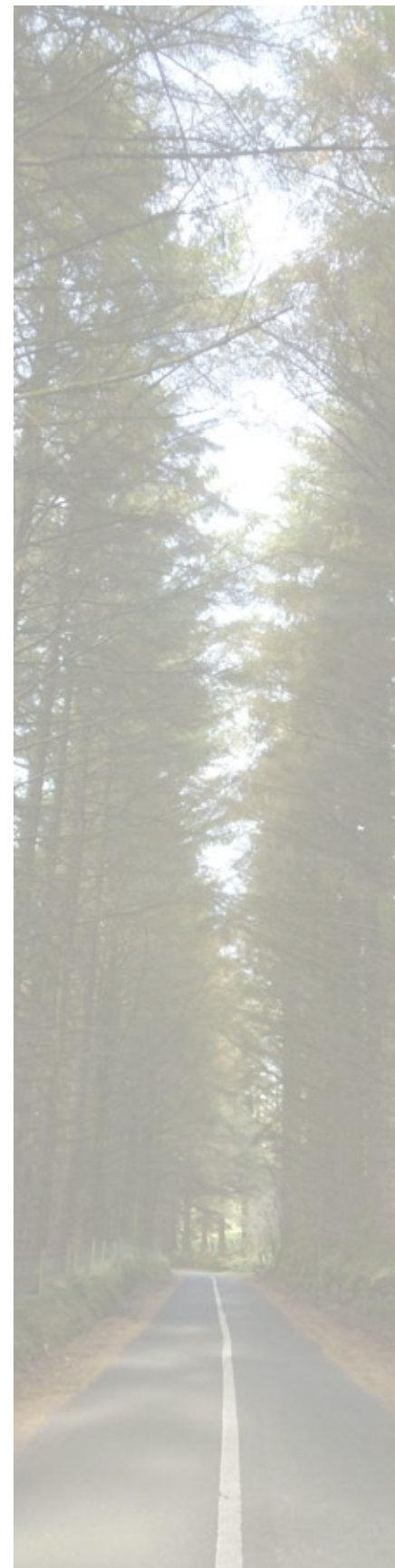
Summary – Domestic Tourism

Overall there was less domestic tourism in 2012 over 2011 with both visitor volume and expenditure declining. However VFR showed a rise of 6%. The majority of bookings are made within two weeks of travel and method of booking is dominated by internet and phone. The south-west and south-east are the most popular destinations. The majority of people travel by car and stay in hotels followed by rented accommodation. Domestic holidays are popular with those in older age groups (40+). The majority of longer holidays were taken between July-September in 2012, while shorter holidays were more evenly spread through the year. The most popular leisure pursuits for domestic tourists were visiting national parks and houses/castles. The most popular active pursuits were hiking/walking and water-sports. Spas, heritage/interpretative centres and gardens were also popular. Almost all (98%) of domestic holidaymakers were satisfied with their holiday. The main advantage was seen as avoiding air/sea travel; the main disadvantage as the poor weather.

2.2.4.2 Domestic Tourism Trends

Recent research by Fáilte Ireland has highlighted several trends for the **domestic visitor market** with wider implications for both the domestic and international adventure tourism market. These include:

- **Ageing populations** – although staying healthier/active for longer and are more likely to engage in cultural/historical pursuits. Facilities to cater for older people are very important.





- **Baby boom in Ireland** – due to the large numbers of babies being born in the last five years there will be a growth in the under 15's population in Ireland over the next 10 years, in contrast to many other European countries.
- **Vertical families** – with older generations being more active they are increasingly incorporated into the life and activities of the family and three generations often take day-trips and holidays together. Multi-generational experiences in the same place will appeal to this market.
- **Patchwork families** – it is increasingly common for families to be made up of two adults and children from more than one relationship. Opportunities to offer bonding and sharing experiences, creating shared memories, will appeal to these families.
- **Single households** – with people marrying later and often with periods of single living in between relationships small group travel either at home or away can appeal with opportunities for socialising. Small group travel centred around an experience can appeal to this segment



2.2.5 Adventure Tourism

2.2.5.1 Demand for Adventure Tourism

While adventure tourism can include 'hard adventure activities' such as bungee jumping, white-water rafting and skydiving, the majority of those undertaking an adventure activity are engaging in 'soft adventure' such as walking, cycling, angling, horse riding and water sports. The soft adventure category can even extend to activities such as archaeology and bird-watching.

Fáilte Ireland research indicates that in 2011 overseas visitors who engaged in adventure related activities contributed €1.2 billion to the economy and their spending was 45% higher than the average visitor. In addition, visitors engaging in activity tourism stayed longer than the average overseas visitor – 10 days rather than 7.

Adventure tourism has an important role to play in the visitor experience. The most popular activities amongst overseas visitors in 2011¹⁵ were hiking/cross country walking; cycling; golf; angling and equestrian pursuits. While there is no county-specific data, national figures supplied by Fáilte Ireland give an indication of changing demand for adventure activities among overseas visitors:

- **Hiking/ Cross-Country Walking:** Walking as an outdoor activity is increasingly popular. Around 743,000 overseas visitors claim to have gone hiking/cross-country walking in 2011, more than a third of whom stated that walking was an important factor in their choice of Ireland as a holiday destination (225,000). However this remains a decline from the 830,000 walkers achieved in 2009 but an increase on the 700,000 recorded in 2010.

Around a third of these visitors stated that walking was an important factor in their choice of Ireland as a holiday destination (225,000). Of this 740,000 visitors, **78% used walks which start and finish at the same location (in a loop)**, 79% walked for <10km and **only 10% were accompanied by guide**. In 2011 **Mainland Europe** was the most popular market for walking with 44% of the market (**11% France and 10% Germany**) followed by **Britain with 31%** and North America with 18%. The decline in the number of walkers is likely to be result of the decline in the British market.¹⁶ There are no figures for domestic demand however outdoor activities in general are experiencing an increase in demand. These visitors spent €649m while in Ireland.

- **Cycling:** An estimated 173,000 overseas visitors engaged in cycling while in Ireland during 2011, an increase of 9,000 on 2010. The main market for cycling is Mainland Europe with 54% (France 12%, Germany 9%) and Britain/North America with 18% each.¹⁷ These visitors spent €200m while in Ireland.
- **Angling:** An estimated 113,000 overseas visitors engaged in angling while in Ireland during 2011. This is a decline from the 123,000 recorded in 2010. Britain was the most popular market for angling in 2010 with a 56% share but has now moved to second place (46%) behind Mainland Europe which is on 47% (France 12%, Germany 11%), North America remains low on 5%.¹⁸ These visitors spent €97m while in Ireland in 2011. Sea angling is the most popular form of angling, followed by game and coarse. Average spend of the overseas angling visitor was €858 in 2011 as against €470 by the overseas visitor. Angling visitors stayed an average of 12 days in 2011 against 8 days for overseas visitors. Overseas anglers tend to return to Ireland, 64% are repeat visitors compared to 35% of all holidaymakers; four in five of British holidaymakers who fish have been to Ireland before.

¹⁶ Source: Fáilte Ireland 2011

¹⁷ Source: Fáilte Ireland 2011

¹⁸ Source: Fáilte Ireland 2011

¹⁵ The last year for which figures are currently available.

- **Equestrian:** An estimated 71,000 overseas visitors engaged in some form of equestrian pursuit in 2011; an increase of 11,000 on 2010's figure of 60,000 and 25,000 over 2009's figure of 46,000. This is clearly a growing market. The main markets are Mainland Europe with 52% (Germany 11%, France 8%), Britain with 15% (a 22% decline from the 37% of market share in 2010) and North America with 23%.¹⁹ These visitors spent €76m while in Ireland.
- **Watersports:** An estimated that 86,000 overseas visitors participated in water-sports while in Ireland in 2011, spending €65m.²⁰ Of these, **surfing** was the most popular activity followed by **canoeing**. Diving and windsurfing were also mentioned but only by a very small percentage.

2.2.5.2 Adventure Tourism Trends

In recent years several outdoor adventure tourism trends²¹ have begun to emerge with relevance for this project, these include trends for overseas visitors and demographic factors which influence the domestic market for adventure tourism. General trends include:

- **High Yield Segment:** Growth in discretionary expenditure on recreation as the average standard of living rises in the medium to long term.
- **Increased participation:** Higher numbers of *cash-rich time poor* visitors who are reasonably fit treat adventure tourism as a purchasable holiday or leisure commodity rather than a long term pastime. This means more people taking part in activities with a lower skill level but also means more people go on to pursue these interests than in the past leading to an increase at both ends of the skill range;

- **Demand for active learning/ experiential holidays and skill development:** There is an increased demand for holidays which contribute to mental development as well as provide physical exercise in contrast to passive/ sightseeing breaks. Visitors, both domestic and from abroad, increasingly seek authentic experiences that will provide a life-time memory;
- **Increased popularity of cycling, walking and angling:** While the fall in visitor numbers to Ireland has seen an impact on numbers participating in some activities such as walking/hiking in the last couple of years, the overall trend is for increased participation in adventure activities.
- **Responsible Tourism:** Visitors are increasingly concerned about the impact of the tourism industry on the natural environment, seeking low-impact tourism facilities that minimise negative impacts, and activities that result in social and economic benefits for the host environment and population.
- **Risk perception:** Visitors are more aware of risks, real or perceived, to personal health and safety which means that issues of safety need to be highlighted and risks reduced. This means the provision of accurate information and signage; ensuring hard infrastructure mitigates against injury (e.g. handrails) and that asset management systems result in facility maintenance;
- **Access:** Increasing requirement for provision of access for all and particularly for users of varying abilities, for example through reducing path gradients; enabling statutory access; and upgrading and improving the clarity of signage;
- **Conflict avoidance:** Strategic recreation and tourism planning is a necessary requirement for destinations which wish to see a sustainable growth in visitor numbers.

Recent research in the UK²² which is also considered to be applicable to the Irish market suggested some key drivers for the outdoor tourism sector are:

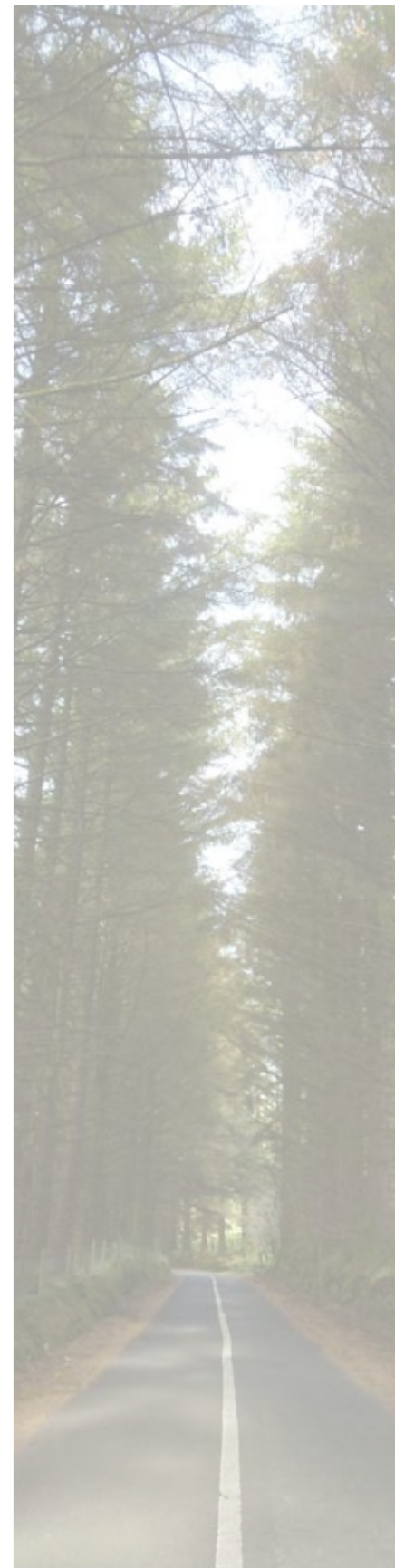
- Interest in **healthy life styles and wellbeing** (amongst some market segments)
- A desire to **experience something different** (experiential travel), particularly ABC1
- **Changing demographics**, particularly in relation to the increasingly health conscious, environmentally aware ageing population
- Increasing levels of disposable income [perhaps less applicable to the Irish market at present], which have helped to make taking part in activity tourism affordable (along with, in some instances, **decreasing cost of equipment**)
- **Increasing awareness of activity tourism** via the internet; better access to the countryside/coast
- Growth of **tour companies specialising in the field of activity tourism** and increasing **professionalism** in the sector
- Activity destinations are becoming **more accessible via improved and low cost transport links** with the growth of low cost airlines
- Greater awareness amongst consumers of the **environmental impacts of tourism**, particularly overseas travel, perhaps, leading to an increase in domestic UK tourism; also economic reasons for an increase in the "stay at home holiday" market [equally so for Irish 'stay-cations'].

¹⁹ Source: Fáilte Ireland 2011

²⁰ Source: Fáilte Ireland 2011

²¹ From presentation from Fáilte Ireland at their Tourism and Adventure Activity Forum Conference, 2010

²² Cited in Working Paper 3 produced for Outdoor Tourism Marketing Project, Blue Sail Trends, 2012



2.2.5.3 Market Profile & Market Segments for Adventure Tourism

Recent research by the Adventure Travel Trade Association (ATTA) indicates typical adventure travellers are aged between 35 & 47 and are evenly divided between men & women and married & single people. Primary information sources include online (Google/official tourism sites), word-of-mouth, peer reviews and social media. ATTA found that the appeal of adventure travel is increasing world-wide.²³

Research in relation to the UK adventure travel market found that activity-based holidays appealed most to the 20-44 demographics. However it also found the pre-family and family life-stage groups were either flat or declining in terms of population; and that the third age & retired groups were expected to grow at a much greater rate in the mid-long term. In terms of a social demographic activity holidays had broad appeal across ABC1/C2 groups with particularly strong demand amongst the AB group.²⁴

Fáilte Ireland commissioned market research in 2013 for several different types of adventure activity with 15,000 interviews conducted across the Irish domestic market and the four key international markets of Britain, Germany, France and the Netherlands.

Walking

The research found that **walking offered the highest potential of any activity-based tourism** for Ireland for both domestic and overseas markets. The French and German markets both offered strong potential as did the domestic market with a 'core' market potential²⁵ of around 1.5 million people or 33% of the population.

²³ Tourism Adventure and Activity Update based on a presentation for the Tourism Adventure and Activity Forum in Killarney on 3rd November 2010

²⁴ Cited in Working Paper 3 produced for Outdoor Tourism Marketing Project, Blue Sail Trends, 2012

²⁵ Core Market Potential: those that have participated in this activity whilst on holiday abroad in the last 2 yrs, and would consider participating in this activity on holiday in Ireland in the next 3 yrs.

The main challenge is to get walkers to travel outside of their own country. The **British (71%) and German (63%) markets showed the greatest potential** with 71% and 63% respectively indicating they would consider Ireland for a walking holiday.

The quality of walking was highly rated by those aware of the product. However some issues were the **availability of information, ease of booking and availability of trained guides**. Respondents also highlighted the need for **linkages between various activities** as part of the overall holiday experience as walking is often combined with cycling on a multi-activity holiday.

The domestic market also rated walking well particularly for quality and choice. Issue were similar to overseas visitors regarding availability of both information and trained guides. Some general points, applicable to each category of the research were:

- What can be seen across all activities is that **beautiful landscape** is the main reason for coming to Ireland – emphasising the need for the use of high quality imagery in promotional material and digital strategy.
- Activity-doers on the whole appear to think **destination first** and then consider whether it would be good to do a particular activity there.
- The **holiday experience is what matters in destination choice**; whether the country is set up for activities comes second for most.
- Promoting Ireland as an activities destination is about using Ireland's USP in the same way as for general marketing; **the activity is a means of enjoying the Ireland experience**.

Cycling

The research found that the largest potential overseas market for cycling was **Germany**, due to its large population and high numbers who cycle abroad. The **British** market is also considered to offer a high core market potential. In addition there is a strong **domestic** market demand in Ireland. The French market was considered to have less potential as many indicated they do not travel abroad.

When asked **what makes a good cycling destination** it was found that:

- Visitors will choose a destination based on the experience of what they will see and do.
- It is important that a route incorporates interesting places to visit.
- Beautiful and varied scenery is the most important destination element for cycling.
- Cycling routes should incorporate attractive cities and towns, access to historical/cultural attractions and easily accessible destinations.

Importantly it was found that a significant proportion of overseas (38%) and domestic (41%) cyclists travel in a group with family or friends which include children. This has a bearing on the level of infrastructure and services required from a trail and in the promotion and marketing of a trail. It is important, where possible, that any facilities provided are safe and traffic free. Whether a trail can be developed on or off-road or the degree to which the route can be segregated from traffic will therefore have a bearing on the type of users it is likely to attract.

When people were asked **what makes a good cycling trail** the responses included:

- Beautiful scenery and landscape.
- Traffic free and safe cycling – although road crossings are acceptable with warnings and maximum safety.

- Access to towns and villages with a range of things to see and do.

Fáilte Ireland indicates that *'this further reinforces the market preference for scenic, flat, traffic free routes, with lots of things to see and do, and with short distances between services'*.²⁶

The research concluded implications for services provision were:

- *Services should not be more than 20km apart - less than 15km if possible*
- *Food, drink, toilets and places to sit are important services*
- *Accommodation only needs to be simple, but must do the basics well*
- *Detailed route maps should be provided, with attractions and services clearly marked*
- *Attractions, towns, villages etc on route must offer reliable facilities to lock up bikes*
- *An emergency contact for help would be welcomed*
- *Guides and organisers are not really needed*
- *Public transport is not needed by the majority*
- *Luggage transfer would be welcomed*
- *Different drop off points for bike hire would be desired*²⁷

To enable better targeting the research concluded cyclists were most likely to be:

- Any age, but incidence tends to increase slightly with younger age
- ABC1's if overseas

²⁶ Source Fáilte Ireland 2013

²⁷ Source Fáilte Ireland 2013

- Those living in a major city
- Either gender, but incidence is slightly higher among men

Angling

The research found that the country with the highest core market potential for angling is in the **German market followed by the French and British**. However it is suggested that given almost half of all overseas visitors originate from Britain this market may offer the best overseas prospects. It was also found that the **Irish domestic market had a strong interest in angling** with a core market potential of almost half a million.

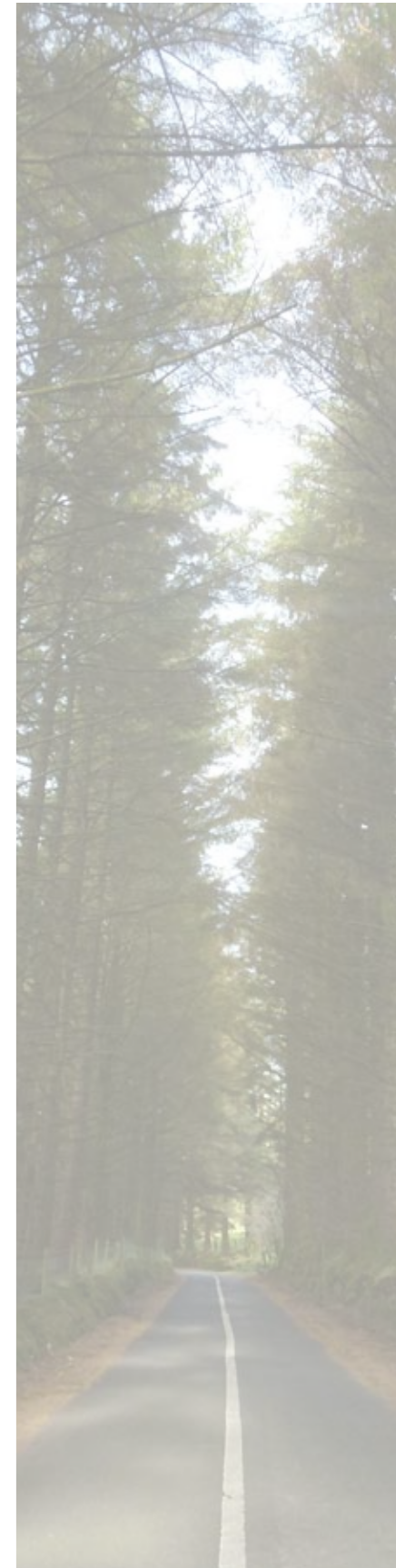
Competitor destinations were seen as England, Scotland, Wales and Spain however 73% of the core market potential would consider Ireland for an angling holiday. A high proportion of domestic anglers (73%) had participated in an angling holiday or break in Ireland in the last two years.

Overseas respondents **rated Ireland's angling product highly** and had a high level of awareness of the angling offer. Issues were considered to be the need for **awareness of the availability of both trained guides and equipment**.

The domestic market also rated Ireland's product highly emphasising the quality and range of choice. Issues were considered to be **value for money and the availability of trained guides**.

Equestrian

The research found that horse riding & pony trekking is more of a **niche market** than other activities such as walking or cycling and is of greater interest to the **British markets** than those in Europe. For this reason **careful targeting** would be required to see a return on investment. The **domestic market was considered to have more interest** than Mainland Europe offering an opportunity for development.





Competitor destinations were seen as England, Scotland, Wales and Spain, as with angling. In addition France, Italy and Spain were also seen as more popular than Ireland with better weather suggested as a reason for this. However 65% of the key British market would consider horse riding/pony trekking in Ireland in the next three years. When the domestic market were asked where they had participated in this activity on holiday, 69% of Irish people had done so in Ireland, followed by England and Spain with 12% each, illustrating the **strong domestic market** for equestrian pursuits.

Respondents rated the Irish equestrian product offer highly citing the **quality of the offer, range of choice and equestrian centre standards** as positives. Issues were the **practicalities of booking and the availability of information, particularly in relation to the standard and quality of the offer.**

The **domestic market was more critical of the Irish equestrian product offer**, particularly in relation to value for money, however the quality and standard of the offering is considered to be good.

The research indicated that *'due to the high proportion of blue collar C2DEs in the British core market there could be an opportunity here to develop a 'value' or low cost offer in order to tap in to the potential here, as cost will be essential to converting this segment.'*

Watersports

The water-sports category focuses on **kayaking, diving and surfing** and excludes angling and sailing which were surveyed separately. The overseas market with the greatest core market potential was found to be **Germany and Britain followed by France**. The **domestic market** also has high core potential of 11% of the population, or over 855,000 people.

The greatest competition comes from both respondents' own countries and warm weather countries such as France, Spain and Italy. However 65% of the core market potential in Britain would consider participating in watersports on holiday in Ireland in the next three years as would 53% of the French core market potential and 62% of the German market. The domestic market research indicates 53% have participated in watersports

in Ireland.

People **did not rate watersports in Ireland as highly as other activities** citing value for money, quality of the offer, range of choice, practicalities of booking, availability of information, availability of trained guides and availability of equipment as issues for this sector. There was also a **general lack of awareness about the watersports offer** which, it was thought, could contribute to the low ratings.

Irish respondents were also **critical of the watersports offering** with value for money being the main issue. There was also found to be a **lack of awareness** about the practicalities of booking, availability of trained guides & equipment. It was thought greater awareness of the offer, particularly in relation to the availability of guides and equipment would improve overall perceptions of the product.

The watersports product was thought to have the most to do of any of the activity product areas in terms of **promotion and raising awareness**. However, given the strong core potential for this product, this sector could have good opportunities for growth.

2.2.5.4 Product Bundling

Fáilte Ireland recently undertook research where they analysed product bundling – asking visitors which activities they undertook in addition to their principal activity. For example for visitors whose principal activity was angling; they also engaged in hiking/hillwalking (24%) and water-based activities (13%). For visitors whose principal activity was water-based activities; they also engage in hiking/hillwalking (51%) and fishing (23%). Visitors who went horse-riding also went hillwalking (42%) and fishing (10%). Visitors who went cycling had a very strong link with hiking/hillwalking (61%); however the link was not so strong in the other direction with only 11% of visitors whose principal activity was hiking/hillwalking going cycling.²⁸

²⁸ Fáilte Ireland 2010

With many visitors engaged in multiple activities while in the country there is an opportunity to develop a product which caters for various interests. For example a visitor should be able to book a trip which involves hiking, biking and/or cruising along with accommodation and transport in a one-stop shop. This bundling could create additional revenue for each of these types of businesses as well as creating an 'adventure package'.



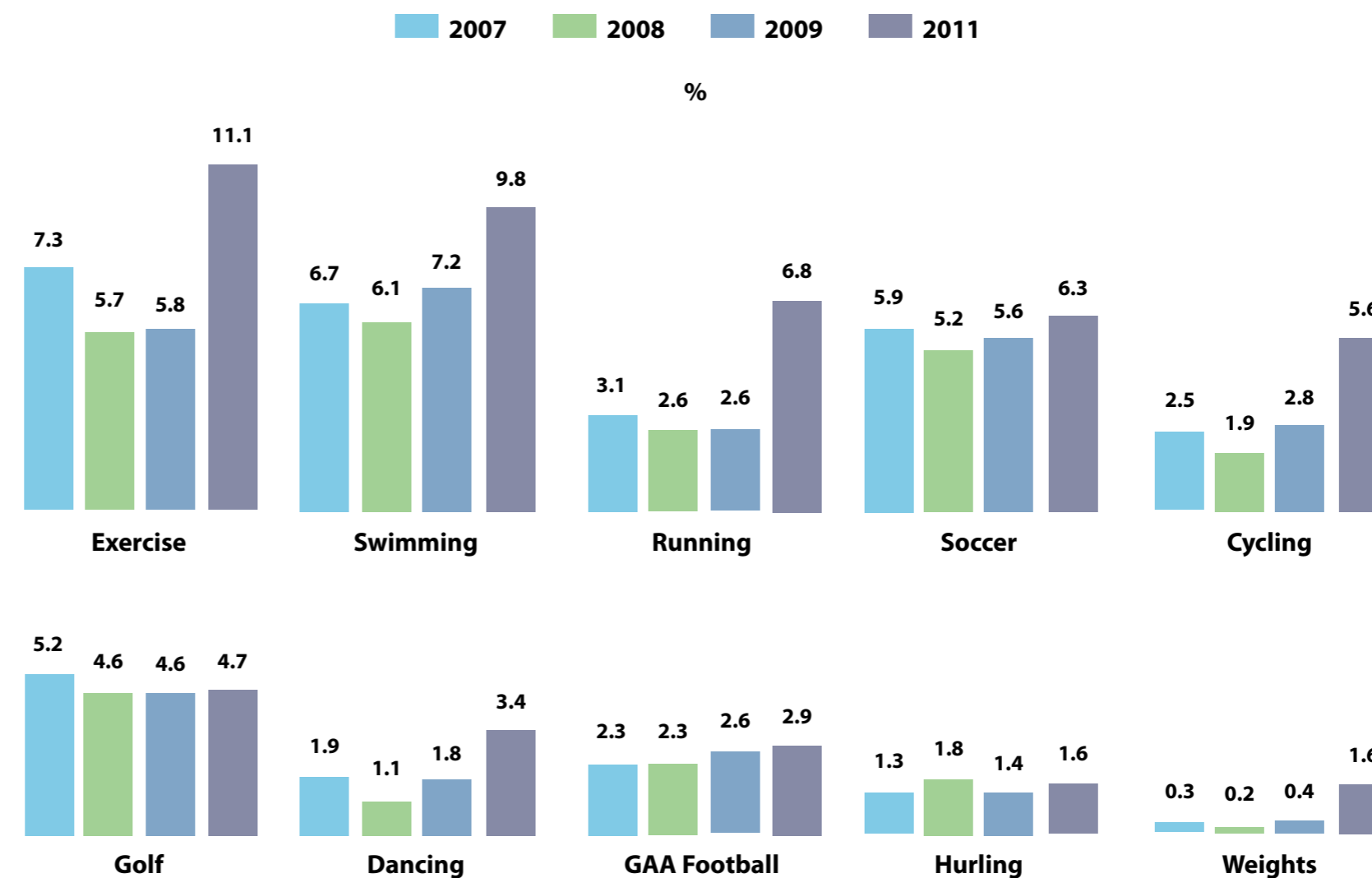
2.3 Recreation Overview - Domestic Participation

There is evidence that domestic participation in recreational activities is increasing. The Irish Sports Monitor survey for 2011, the latest data available, surveys participation in a wide range of recreational activities over a seven day period. This is divided into sporting activities and broader physical activity, specifically recreational walking and walking/cycling for transport.

In general the numbers of people engaging in sport has increased dramatically from 32.9% in 2007; 30.8% in 2008 and 33.5% in 2009 to 45.9% in 2011. Exercise is now the most popular sports activity with 11% participating, mostly in gym related activities. Almost one in ten people went swimming in the previous week. Participation in individual sports such as running and cycling has grown strongly with the percentage of people engaging in these activities almost doubling in comparison to 2009. Running has moved from the fifth most popular sport to the being the third most popular sport, corresponding with the rise in participation in events such as 10km, half marathon and marathon events around the country. The growth in cycling participation corresponds to its rise in popularity throughout Europe, particularly in the UK.

The graphs below show participation for the top ten sports in 2011 relative to 2007, 2008 and 2009. While the types of sports and the order they appear in remains consistent with previous years it can be seen that there is strong growth in exercise, swimming, running and cycling.²⁹

Figure 4 - Ireland: Sports Participation, 2007 – 2011



Source: Ireland Sports Monitor survey, 2011

Recreational walking remains the most popular form of physical activity, with two-thirds of the population walking, as shown in Figure 4.³⁰

Walking for transport has declined, possibly due to fewer people walking to work due to the nationwide decline in employment. The Irish Sports Monitor suggests 'it is likely this same dynamic has driven the increase in recreational walking as those unemployed replace walking for transport with recreational walking'.³¹

³⁰ Irish Sports Monitor, page 37

³¹ Irish Sports Monitor 2012, page 36

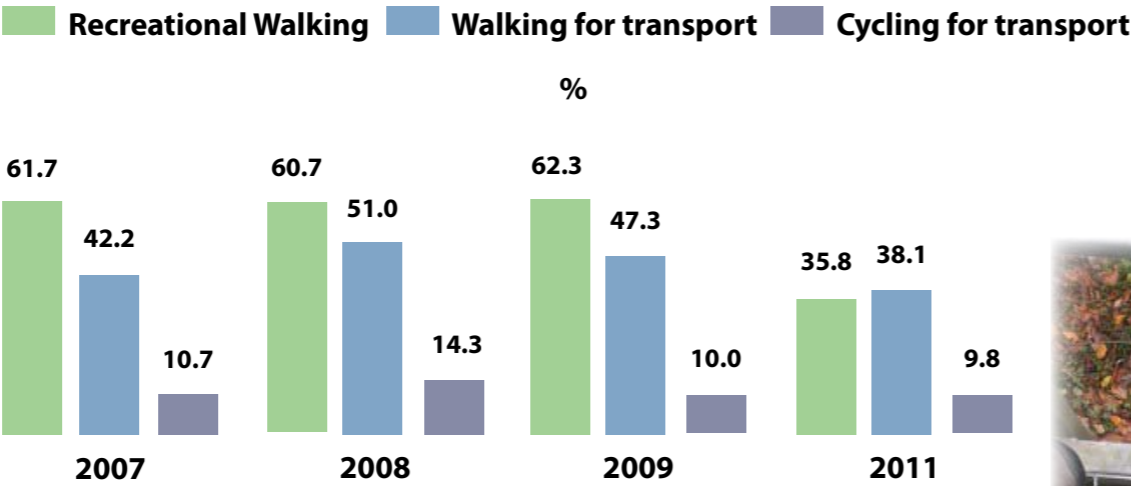


²⁹ Irish Sports Monitor 2012, page 25



The proportion of the population cycling for transport remains unchanged at 10%. The reason there being no change in this figure in comparison to the decline in the number of people walking for transport is the success of the Cycle to Work and Dublin Bikes initiatives.

Figure 5 - Ireland Recreational Activity Participation, 2007 – 2011



Source: Ireland Sports Monitor survey, 2011

The Irish Sports Monitor argues that there is a divide in the popularity of cycling for transport between Dublin and the rest of Ireland, possibly explained by the popularity of the Dublin Bikes Scheme. Around 13.4% of people surveyed in Dublin participated in cycling in 2011; compared to 8.3% of people in the rest of Ireland.

With regards to broader physical activity the report concludes that *'it is clear that the unemployed are participating more frequently in recreational walking than before, and that they are filling additional leisure time with this activity is encouraging both from the perspectives of physical and mental well-being.'*³²

³² Irish Sports Monitor 2012, page 43



The report analyses the proportion of the population who engage in varying levels of activity³³ and highlights the positive growth in the proportion who are highly active, from 26% to 30% between 2009 and 2011; and the decline in the proportion who are sedentary³⁴ from 16% to 13% over the same period.

The proportion who are sedentary is greater amongst males in the 45-54 age group and more likely in rural areas due to people having to travel further to access facilities or roads being unsuitable for cycling or walking.

The reports makes the point that over half of sports participants do not meet national or international guidelines for physical activity with sports such as soccer, golf and dancing the key sports that do not deliver sufficient levels of activity. The report suggests: *'What is clear from this analysis is that participating in only one type of activity is unlikely to deliver a sufficient level of physical activity to achieve these guidelines. If delivering an increase in the proportions who achieve this recommended level of activity is a priority, then a focus may be required on encouraging those who are already active to adopt additional types of activity.'*³⁵

Of all the people surveyed there are 61% who would like to increase their activity levels, mainly in sports such as swimming, cycling and walking, which suggests the encouragement of participation in these activities should be prioritised. Amongst those who are inactive the report concludes that recreational walking is a **'key gateway activity'** to encourage those who are inactive to become active. *Policy initiatives will need to focus on this form of activity to encourage those who are inactive to undertake walking and ensure that the population who are currently inactive are made aware of safe and attractive walking environments.'*³⁶

³³ 30 minutes physical activity 5 times during the previous 7 days

³⁴ Did not participate (20minutes) in recreational activity during the previous seven days and does not cycle or walk to work regularly for transport

³⁵ Irish Sports Monitor 2012, page 55

³⁶ Irish Sports Monitor 2012, page 62, our emphasis

2.4 Mountain-based Tourism

2.4.1 Adventure Travel

Mountain tourism fits within as a component of the broad adventure travel market³⁷. Overall adventure travel activity, including “soft” as well as “hard” forms is estimated at 150 million travellers from the three major source regions of North America, Latin America and Europe.³⁸ Hard adventure trips are taken by around 2% of the population, with the proportions increasing among Europeans in particular. Soft adventure departures are much higher. On average, 25% of international trips taken from the three regions are soft adventure trips. Soft adventurers are an important segment for destinations and tour operators as they are more likely to try different activities and destinations than hard adventurers, as well as to respond to targeted marketing. Consumers in all three regions surveyed by the Adventure Tourism Market Report have increased the soft adventure component of their trips in recent years and around 43% of Europeans indicated that they would take a soft adventure trip on their next holiday.³⁹

³⁷ Adventure travel as defined by the Adventure Travel Trade Association includes the following activities relevant to the study area: attending local festivals/events, backpacking, birdwatching, camping, canoeing, climbing, cultural activities, cycling, eco-tourism, environmentally sustainable activities, fishing, getting to know the locals, hiking, horseback riding, orienteering, trekking, walking tours, visiting historical sites.

³⁸ Adventure Tourism Market Report. George Washington University School of Business, Adventure Travel Trade Association, Xola Consulting. 2010
³⁹ ibid

2.4.2 The Growth of Mountain Tourism

Mountains cover 24% of the earth's land surface and are home to 12% of the global population.⁴⁰ As more mountain communities have developed better access infrastructure, so the inflows of visitors from outside have grown and facilities and amenities have been created to cater for the increasingly varied demand for recreation and tourist activities in, and associated with, mountains. The International Center for Integrated Mountain Development (ICIMOD) estimates that mountains now account for 15 to 20% of the global tourism market, generating between US\$100 and 140 billion a year. It sees tourism as one avenue where mountain specificities that are generally considered constraints to development – remoteness, difficult access, wilderness, insular cultures, and subsistence lifestyles – can be transformed into economic opportunities. Being labour intensive, having relatively high multiplier effects, and requiring relatively low levels of capital and land investment, tourism can yield significant benefits in remote and rural areas where traditional livelihoods are under threat.⁴¹

While the great majority of mountain tourism involves snow-based activities, demonstrated by the facts that there are presently 2,110 ski resorts around the world of which 20% attract over 100,000 skiers a year,⁴² lower level mountains have been increasingly able to attract and cater for an extensive range of both adventure and less physically demanding activities, principally because they offer large areas of natural beauty which have not been developed for industrial purposes.

Examination has been made in earlier sections of this chapter of the demand in Ireland for, and the characteristics and needs of, the principal forms of recreational and tourist activity with relevance to the study area i.e. walking, cycling, equestrian, angling and watersports.

⁴⁰ Tourism and Mountains. UNEP, Conservation International, Tour Operators Initiative, 2007.

⁴¹ <http://www.icimod.org/?q=1252>

⁴² 2013 International Report on Snow and Mountain Tourism. Laurent Vanat, 2013.

Activities specific to mountains that have significant potential in the study area and that warrant more detailed study are mountain walking and mountain biking. Major tourism destinations like New Zealand have identified these hiking/walking and cycling as primary segments to be targeted in their marketing campaigns. This is based on the finding in its research that over one-third of the 60 million Active Considerers (defined as those who consider New Zealand an appealing destination to visit, is seriously considering New Zealand for their next destination, name New Zealand within their top five most preferred destinations and would be willing to spend above a set threshold on their trip) in their six main target markets of Australia, China, USA, UK, Germany and Japan, who rate New Zealand as a top destination for hiking/walking and cycling.⁴³

Mountain trekking/hiking/walking

The Tourism Intelligence Scotland Walking Tourism website (<http://www.tourism-intelligence.co.uk/intelligence-guides/01-walking-tourism>) attributes the growth in popularity of walking to the fact that *“More than ever, people are looking for authenticity and rejuvenation and are more focused on well-being and enhancing their quality of life. Above all people want to spend time on things that matter to them and reawaken the spirit within. How better to do this than by walking.”*

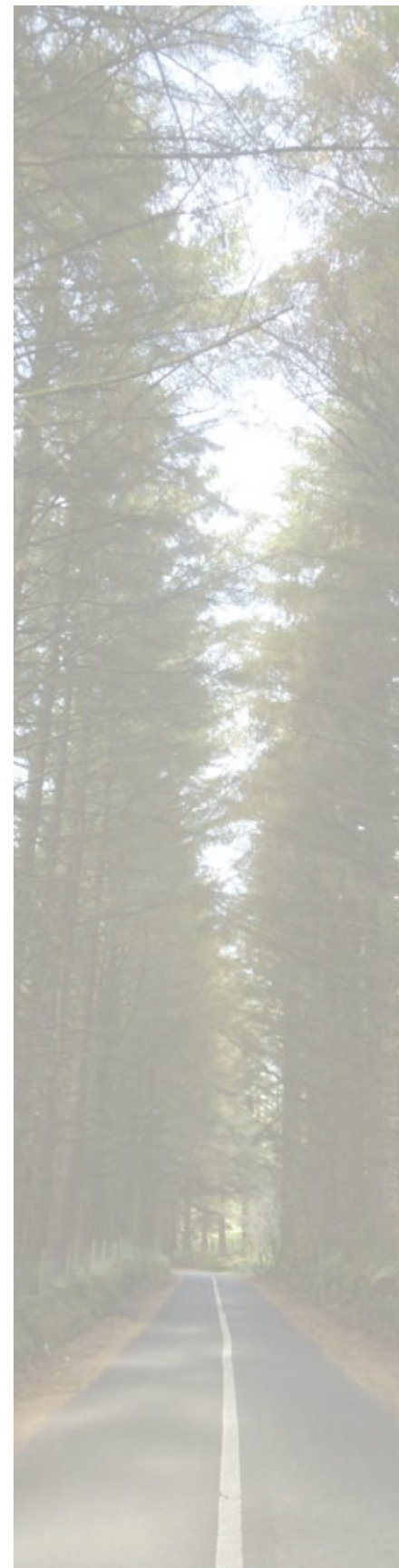
Destination authorities recognise that walking embraces a range of types and degree of physical rigour, with areas with mountains, valleys, inland waterways, forests etc in rural settings providing the basis to cater for the multiple sub-segments of the walking market. Scotland attracts nearly 1.8 million walking holiday tourists, mainly from the UK but there is also strong demand from mainland Europe.⁴⁴

Statistics for 8 of New Zealand's 9 Great walks show that there were 88,000 participants in 2010/11 who spent at least a night in paid accommodation in the area generating 200,000 bednights.⁴⁵

⁴³ Tourism New Zealand Three Year Marketing Strategy FY2014-FY2016. Tourism New Zealand. 2013.

⁴⁴ <http://www.tourism-intelligence.co.uk/develop-your-business/presentations/walking>

⁴⁵ <http://www.doc.govt.nz/about-doc/role/visitor-statistics-and-research/great-walks-visitor-statistics/>



Mountain biking

Participation in mountain biking has increased markedly over the last two decades worldwide, and has resulted in the emergence of a number of sub-disciplines and the development of mountain bike specific infrastructure and events. The revenue generated by some of these facilities has proven to be significant, particularly where they are located within easy reach of mid-to-large population centres.

Mountain bike tourism emerged largely as a result of the motivation of dedicated mountain bikers to experience new terrain, but has grown to include travel for participation in competition, festivals and skills training, as well as the incorporation of mountain biking into other commercial tourism activities.⁴⁶

The scale of mountain biking is considerable in all locations that cater for the activity. Scotland is a good example.

Scotland

According to the 'Economic Value of Mountain Biking in Scotland' report commissioned by Scottish Enterprise, mountain biking tourism generates £46.5 million each year for the Scottish economy. This is from people who go to the country purely to participate in the mountain biking product. If all the spending of all visitors who engage in mountain biking is added on, the figure amounts to £119 million. The report estimates the total number of mountain biking visits at over 1.3 million per year, with nearly 600,000 visitors using the purpose-built trails, such as the 7 Stanes locations with the Glentress trail in the Tweed Valley rated as the best in Britain having recently opened an £8.5 million state-of-the-art Visitor Centre.

22.5% of Scotland's mountain bike visitors stay overnight – amounting to approaching 300,000 people. The report states that mountain biking is set for significant growth over the next five years, with potential additional revenue of £36 million, which will increase the overall market value to £155 million.⁴⁷

⁴⁶ Mountain Bike Tourism: Market Profile for Tasmania. Tourism Tasmania. December 2008.

⁴⁷ Economic Value of Mountain Biking in Scotland. Scottish Enterprise. 2013

Participation Levels

Significant and growing participation levels are illustrated by the following:

- Approximately 11.8 million people in the UK own a mountain bike, with an estimated 1.3 million regularly biking off road,⁴⁸
- Regular participation in the US ranged between 4-6% of the population (~14 million riders) between 1994 and 2003,⁴⁹
- ~ 3.5 million German residents are mountain bikers (out of 7.2 million recreational cyclists)⁵⁰

2.4.3 Planning and Managing Mountain Tourism

There is a growing body of evidence from all continents of planning to facilitate increased recreational use of mountains while ensuring protection of the natural features and biodiversity of the areas. Planners recognise the importance of addressing three aspects: soft users, hard users, and management and protection. Given that mountains typically spread across multiple administrations and tourists do not recognise such boundaries in the pursuit of their interests, this triple set of needs places strong responsibility on the different administrations of the mountains to ensure a coordinated and consistent approach.

Investment is necessary to ensure both that:

- the visitor experience is of the highest order, and
- the fabric of the natural environment is not despoiled through inappropriate built development, damaging uses and overuse.

⁴⁸ Genesis Strategic Management Consultants (2008) Draft: The Sustainable Development of Mountain Biking in Scotland – A National Strategic Framework, UK

⁴⁹ Koepke, J. (2005) Exploring the Market Potential for Yukon Mountain Bike Tourism, Cycling Association of Yukon, Canada

⁵⁰ Ibid

The two examples of planning, management and marketing of their mountain tourism – Scotland and New Zealand – provide a number of valid pointers for the study area. Scotland has a national framework for the various activities and through Tourism Intelligence Scotland provides guides and training assistance for individual regions and operators, emphasising the importance of realising opportunities and the provision of the facilities and services the activity tourist wants.

New Zealand has a highly structured, competitive feasibility process through which development funds are allocated for the creation of new trails across the country.

Scotland

Tourism Intelligence Scotland has a series of guides, such as Mountain Biking in Scotland, in which it outlines what it calls practical insights into ways in which opportunities can be realised and exploited successfully. The mountain biking guide has a series of sections: what you need to know about mountain biking, who are our mountain biking visitors, how to attract mountain bikers, how to grow your business, links and resources, and next steps for Scotland⁵¹. The website version of the walking guide has a webinar from Highlands and Islands Enterprise that looks at what those embarking on a walking holiday are really looking for, how to attract more visitors by using different kinds of communication, how and where to find these visitors, and what the predictions are in terms of future trends and visitor behaviours.⁵²

New Zealand

New Zealand has established The New Zealand Cycle Trail Project, through which applications for funding were invited from around the country. Of the 54 submissions, 13 were selected in December 2013 to go through to stage two of the next funding round of the project. These are in addition to seven 'Quick Start' trails that were announced in mid-2009, and are already in various stages of development. A feasibility study on these routes is now being undertaken.

⁵¹ Mountain Biking Tourism in Scotland. Tourism Intelligence Scotland. 2013

⁵² <http://www.tourism-intelligence.co.uk/develop-your-business/presentations/walking>

This process will price the cost of development and check to see that what is promised in the concept can be delivered on. If all thirteen of these trails proceed through to construction, there will be a total network of around 2,000 kilometres of iconic Great Rides. With a limited funding pool of NZD50 million, prioritising the trails through the rigorous feasibility study is a necessary step.

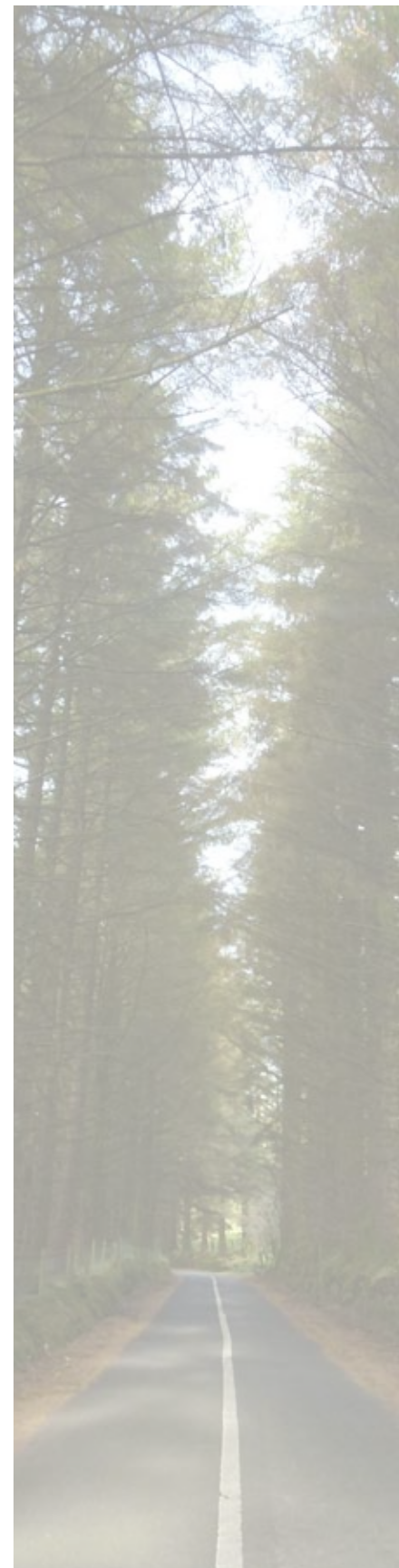
Ireland

The National Trails Office guide outlines all the key requirements and management standards for the development and construction of walking, cycling, equestrian and multi-use trails in Ireland and is the key resource for future development. It states:

“The simple objective of all trail development projects should be to create a trail that has long term appeal, sits in harmony with the environment where it is developed, has the full support of all landowners and the community and is manageable and viable in the long term.

The best way of achieving this is to plan carefully and thoroughly from the outset, to consult widely with landowners, land management agencies and others and get advice and support when needed. It is important that a potential market and its target users are identified for any proposed development.

Committing scarce public and community resources should only occur when there is a clear business case for the proposed development. Considerations should include the cost of developing the trail and its ongoing maintenance versus the potential number of users. A trail development project is not a short term undertaking but a long-term commitment. By allowing sufficient time to plan and design a new trail, this will greatly ease the maintenance and management commitments in the long term.”⁵³



⁵³ A Guide to Planning and Developing Recreational Trails in Ireland. National Trails Office. February 2012.

CHAPTER THREE: PRODUCT AUDIT AND SITUATION ANALYSIS

3.1 Product Audit Methodology

For the purposes of this study a comprehensive product audit was undertaken utilising a combination of:

- **Desk Based Research:** Focussing on Fáilte Ireland's Tourism Content System, county tourism websites, county development plans, web searches
- In depth site visits for the study area
- Targeted consultation

A database was utilised to store and analyse tourism and recreation product data under the headings of:

- **Accommodation:** e.g. hotels, guesthouses, country houses, self-catering, town houses, holiday homes, farmhouses with accommodation, hostels, historic houses, restaurants with accommodation and camping and caravan parks.
- **Attractions:** e.g. Built and Cultural Heritage including historic houses and castles, heritage & visitor centres, museums and walking tours; Religious Heritage including churches, abbeys and monasteries and cemeteries; Natural Heritage including natural attractions, forest parks, parks, beaches, gardens and visitor farms)
- **Activities:** e.g. walking trails, cycle trails, bike hire, boat hire, fisheries, tackle shops, marinas, sea angling charter, tourist information offices, outdoor activity operators, equestrian, bird-watching, golf clubs, arts centres, language schools, driving routes, art craft and food producers, farmers markets, genealogy, visitor information, family fun, retail, restaurants, cafes, pubs and bars, theatres and cinemas, nightclubs, fitness and leisure, coach hire and racecourses.
- **Festivals & Events**

This product audit identified 875 tourism related products within the primary study area and another 200 within the secondary study area. More detail is available in Appendix A4: Product Audit Detail and the separate Excel database.

3.2 Gateways and Access Points

There are three tiers of gateways to the study area:

Tier 1: Large urban areas in close proximity to the study area which act as a base for many visitors and which include significant resident populations.

Tier 2: Medium size towns and attractions which although outside the study area which may be part of visitor's circuit or act as a magnet to bring visitors into the broader area thus benefitting the communities study area.

Tier 3: Primary Destination Gateway Towns – these are included because of their role as transport hubs, population size, strategic location and availability of accommodation and local ancillary services.

Tier 4: Secondary Destination Gateway Towns - these include those villages and smaller settlements which could also be considered access points for the four mountain areas.



Table 15: Gateways to the Study Area

Tier 1: Large Urban Areas	Tier 2: Towns & Attractions outside study area	Tier 3: Primary Destination Gateways	Tier 4: Secondary Destination Gateways
Cork (190,196)	Youghal	Cashel	Kilmallock
Limerick (91,303)	Midleton (Midleton Distillery)	Mitchelstown	Kilfinane
Kilkenny (24,423)	Blarney (Blarney Castle)	Cahir	Doneraile
Waterford (46,732) ¹		Clonmel	Clogheen
		Dungarvan	Cappoquin
		Charleville	Ballymacarbry
		Mallow	Carrick-on-Suir
		Tipperary	Lismore
			Lisvarriane

In addition to gateways there are a range of **key access points** to the study area for visitors and locals the majority of which are located in the primary destination gateways, such as:

- **Rail and bus stations** (see 3.3 below)
- **Intersections with existing trails** (see Map 4: Study Area Walking Routes and Hubs)
- **Attractions in the study area:** e.g. accommodation, activities, restaurants, shops that attract people to the area.

These gateways, access points and the roads between them are the places where economic benefits from visitors are most likely to be realised.



¹ CSO Census 2011

3.3 Public Transport Connections

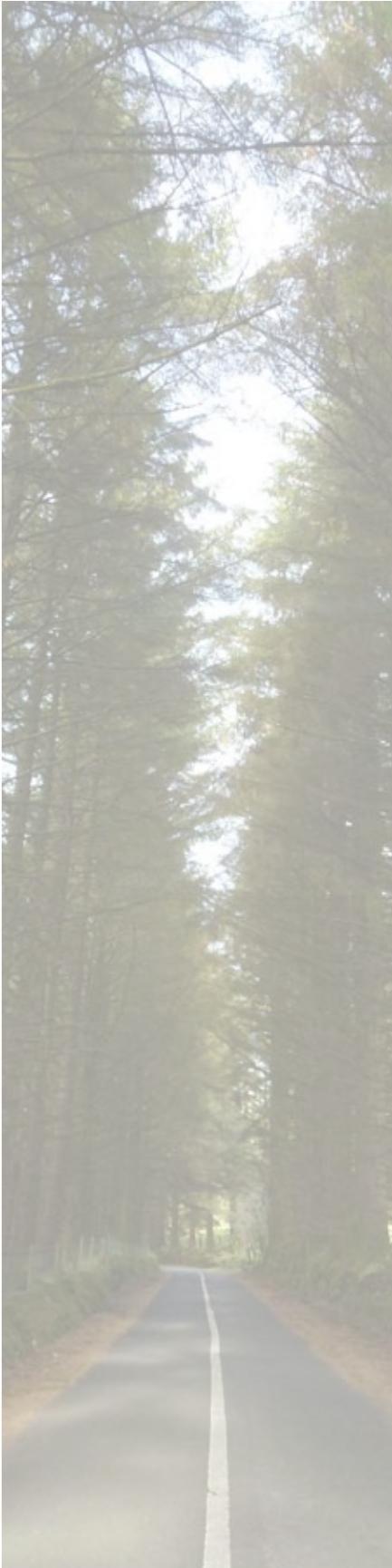
Rail Stations: Rail lines from the four main urban gateways² include the:

- Dublin Heuston-Waterford via Kilkenny line from which trains run to Limerick Junction via Carrick-on-Suir, Clonmel, Cahir and Tipperary
- Limerick line to Limerick Junction, which runs on to Waterford and Cork
- Cork line to Limerick Junction which includes stops at Mallow and Charleville
- Cork to Midleton line

The routes and stations of these rail lines can be seen on *Map 2: Study Area Overview*.

Inter-city trains carry a maximum of three bikes per train on every service. There is a charge for taking your bike on the inter-city train. The cost of bringing your bike depends on the distance you are travelling: €2.50 for up to 56km, €4.00 for 57km-108km, €5.50 for 109km-137km, €8.00 for 138km+. Iarnród Éireann recommends customers reserve their bicycles spaces online in advance of travel along with their seat. There is a charge of €6 per bicycle one way or €12 return. However at the moment if three people wish to take their bikes on the train they have to pre-book two bikes on line and one in the station, hoping that there is one bike space free by the time they get there – you cannot pre-book three on-line.

² www.irishrail.ie/travelandstation





Commuter trains can carry several bikes however Iarnród Éireann unable to confirm a maximum number saying bikes had to be pre-booked and the system would advise if there was space. Between 10:00am and 3:30pm and after 7pm and at all times weekends bikes may be carried on Cork area commuter services for free. Note on days of major sporting/concert events carriage of bikes may be withdrawn. Outside these hours bikes are not permitted unless they are folded bikes. The carriage of bicycles on Commuter services is at the discretion of station staff. At certain times (e.g. major sporting fixtures /concerts), it may not be possible to permit carriage of bicycles on Commuter services.³

Bus:

Relevant Bus Éireann services⁴ include:

Expressway Services

- 7: Cork-Fermoy-Mitchelstown-Clogheen-Cahir-Clonmel-Carrick-on-Suir-Kilkenny-Dublin
- X8: Cork-Fermoy-Mitchelstown-Cahir-Cashel-Dublin
- 40: Rosslare-Wexford-NewRoss-Waterford-Kilmacthomas-Dungarvan-Youghal-Midleton-Cork-Macroom-Killarney-Tralee
- 51: Cork-Mallow-Buttevant-Ballyhea-Charleville-Limerick-Ennis-Galway
- 55: Limerick-Limerick Junction-Tipperary-Bansha-Cahir-Clonmel-Kilsheelan-Carrick-on-Suir-Pilltown-Mooncoin-Waterford

Regional Bus Services

- 243: Cork-Mallow-Buttevant-Newmarket
- 245: Cork-Fermoy-Mitchelstown & return

³ Conversation with Iarnród Éireann, 7th October 2013

⁴ <http://www.buseireann.ie/inner.php?id=246>

- 320: Limerick-Charleville & return
- 328: Limerick-Galbally
- 329: Limerick-Kilmallock-Kilfinane
- 347: Limerick-Tipperary
- 362: Waterford-Dungarvan
- 366: Waterford-Dungarvan-Cappoquin-Lismore
- 367: Waterford-Carrick-on-Suir-Clonmel



Figure 6- Bus Éireann Network in the study area



3.4 Visitor Attraction Performance

Table 16 below shows the number of visitors to all fee-paying and free attractions in the study area that made visitor number returns to Fáilte Ireland, between 2007 and 2012.

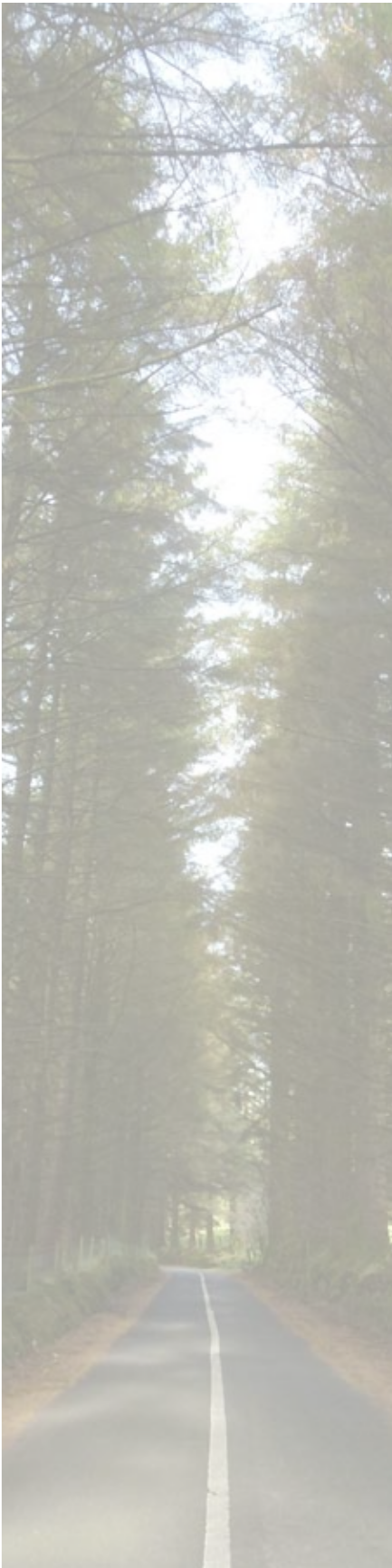
Table 16: Primary Study Area Fee-paying and Free Visitor Attractions 2007-2012⁵

	Attraction	County	2007	2008	2009	2010	2011	2012
1	Rock of Cashel (fee)	Tipperary	258,397	237,732	221,481	204,270	233,038	240,406
2	Cahir Castle (fee)	Tipperary	66,806	57,208	54,976	52,037	59,822	62,818
3	Ballyhoura Mountainbike Trails (free)	Limerick	N/A	N/A	25,000	50,000	60,000	62,000
4	Swiss Cottage, Cahir (fee)	Tipperary	N/A	19,984	19,089	22,139	20,939	21,521
5	Lismore Heritage Centre (fee)	Waterford	17,359	25,765	20,000	22,000	20,195	N/A
6	Charleville Castle (fee)	Tipperary	8,000	9,000	12,000	12,000	14,000	N/A
7	Dungarvan Castle	Waterford	8,227	7,408	6,622	9,730	9,983	11,015
8	Ormonde Castle, Carrick-on-Suir (fee)	Tipperary	4,165	3,339	8,218	8,108	9,539	9,240
9	Mainguard, Clonmel (free)	Tipperary	2,498	5,331	9,409	6,979	6,198	7,273
10	Tourin House, nr Cappoquin	Waterford	350	900	750	640	522	576
11	Cappoquin House and Garden (fee)	Waterford	284	215	128	212	490	N/A

Observations regarding these data are:

- There are **11 attractions** within the study area that made returns to Fáilte Ireland. Visitor numbers to these attractions in 2012 ranged from under 500 to 240,406.
- Four of the attractions for which visitor data is available for 2012 recorded visitor numbers above 20,000.
- By far the most popular attraction within the study area is the **Rock of Cashel** with 240,506 visitors in 2012. This could be considered a gateway attraction to the area.
- **Mountain biking** in the Ballyhoura Mountains is now a significant attraction in itself, attracting 62,000 visitors in 2012.

⁵ Source: Fáilte Ireland 2012



- **Towns with attractions**, within the study area, that provide data to Fáilte Ireland include Charleville, Cahir, Clonmel, Carrick-on-Suir, Lismore, Cappoquin, and Dungarvan.
- Many attractions have seen **visitor numbers decline** in the last 6 years. The top three attractions within the study area, Rock of Cashel, Cahir Castle and Ballyhoura Mountain Biking Trails, have seen an increase in visitor numbers, a positive sign.
- Attractions are located mostly in County Tipperary (6) followed by County Waterford (4) and County Limerick (1).

Table 17 below shows the number of visitors to all fee-paying and free visitor attractions, within either relatively close proximity to the study area or in surrounding key urban areas, that made visitor number returns to Fáilte Ireland for the years between 2007 and 2012.

Table 17: Secondary Study Area Fee-paying and Free Attractions 2007-2012⁶

	Attraction	County	2007	2008	2009	2010	2011	2012
1	Fota Wildlife Park, Cork	Cork	362,792	331,062	347,231	377,004	390,124	377,500
2	Blarney Castle (fee)	Cork	401,567	360,000	320,000	308,000	325,000	329,000
3	Holy Cross Abbey, Thurles (free)	Tipperary	260,000	260,000	250,000	230,000	240,000	240,000
4	Kilkenny Castle (fee)	Kilkenny	184,362	256,533	174,164	192,777	206,277	238,244
5	The House of Waterford Crystal	Waterford	N/A	N/A	N/A	N/A	N/A	163,000
6	The Jameson Experience, Midleton (fee)	Cork	105,500	106,000	100,000	100,000	106,000	109,000
7	Cobh, The Queenstown Story (fee)	Cork	110,188	96,783	81,145	78,642	86,173	N/A
8	Bishop's Palace (Waterford Museum of Treasures)	Waterford	N/A	N/A	N/A	N/A	N/A	40,000
9	Medieval Museum (Waterford Museum of Treasures)	Waterford	N/A	N/A	N/A	N/A	N/A	40,000
10	Reginald's Tower	Waterford	12,047	12,571	12,305	13,065	29,368	29,184
11	Waterford and Suir Valley Railway, Kilmeaden	Waterford	22,500	23,500	24,100	29,400	29,000	27,400
12	Curraghmore House & Gardens and Shell House, Portlawn	Waterford	534	599	419	485	493	824

Observations regarding these data are:

- There are **12 attractions** either in close proximity to the study area and/or that could be considered potential gateways to the destination. Visitor numbers to these attractions in 2012 ranged from under 1,000 to 377,500.
- Attractions with significantly high volumes of visitors passing through them are located in the cities of **Cork, Waterford and Kilkenny**, and the towns of **Blarney, Thurles, Midleton and Cobh** outside of the study area – these could be considered potential gateway attractions.
- Five of these include nationally significant attractions attracting over 200,000 visitors p.a. located in **Cork, Blarney, Kilkenny and Thurles**.
- Many attractions have seen their **visitor numbers decline** in the last 6 years. Ones that have bucked the trend include Fota Wildlife Park, Kilkenny Castle and the Waterford City attractions.
- Attractions that have seen a **significant decline** over the 2007-2012 period include Blarney Castle from 401,567 to 329,000.
- Attractions are located mostly in counties Waterford (6) and Cork (4) followed by Tipperary (1) and Kilkenny (1).

⁶ Source: Fáilte Ireland 2012

3.5 Adventure Tourism

Adventure tourism covers a multitude of activities which range from those which require a level of skill and/or to which is attached a degree of risk, such as mountain-biking, bungee-jumping or canyoning - termed hard-adventure; and those which are perceived as requiring a lower level of skill and associated risk such as hiking and bird-watching - termed soft-adventure. Soft adventure tourism activities are likely to appeal to a wider range of people due to the perceived reduced level of skill or experience.

All forms of adventure tourism are experiencing a growth in popularity as people search for a means to experience nature and wildlife in a rural setting. The Adventure Travel Trade Association (ATTA) defines a trip as 'adventure travel' if it involves two of the following three elements:

- connection with nature
- interaction with culture
- a physical activity

3.5.1 Hiking/Walking

The study area contains walking trails of such range and quality that they enable international comparison. While each of the mountain areas are individually renowned for walking, once the areas are grouped together it can be seen that this region is exceptionally well endowed with walking trails from short river walks to loop and linear walks that take a few hours up to long distance multi-day walking routes that take in outstanding views and historical features.

Long Distance Trails

There are five long distance walking trails traversing the study area (see *Map 4: Study Area Walking Routes & Hubs*), with six designated as National Waymarked Trails by the National Trails Office (NTO). These include:

- **The East Munster Way** (75km route from Carrick-on-Suir to Clogheen in County Tipperary)
- **The South Leinster Way** (104km route runs from Kildavin, County Carlow to Carrick-on-Suir, County Tipperary)
- **The Blackwater (Avondhu) Way** (formed from the Avondhu Way (94km) from Clogheen, County Tipperary to Bweeng, County Cork, south-west of Mallow, combined with the Duhallow Way (67km) from Bweeng, County Cork to Shrone, County Kerry, west of Millstreet/east of Killarney)
- **The Ballyhoura Way** (89km route runs from St John's Bridge, County Cork to the west of Charleville, through County Limerick to Limerick Junction, County Tipperary just to the north of Tipperary Town)
- **Tipperary Heritage Way** (56km route runs from The Vee to Cashel, County Tipperary)

The East Munster, South Leinster and Blackwater Ways, along with the Wicklow Way and parts of the Kerry Way and Beara Way, form part of the E8 European Walking Route from Dursey Island, County Cork to Istanbul in Turkey. Three of these routes, the Blackwater (Avondhu) Way, the East Munster Way and the Tipperary Heritage Way converge at The Vee trailhead.



The **St Declan's Way** pilgrims' path from Ardmore to Cashel passes through Ardfinnan and Cahir on the route to Cashel. This route, although not yet a formal Waymarked Way, runs from Ardmore, County Waterford to Cashel, County Tipperary and is 96km long. It utilises the route of a number of ancient and medieval pilgrimage and trading routes such as the Rian Bo Phadraig (Track of St. Patrick's Cow), Bothar na Naomh (Road of the Saints), Casan na Naomh (Path of the Saints) and St. Declan's Road. The route runs mostly through farmland and crosses the Knockmealdown Mountains at Bearna Cloch an Buideal (Bottleneck Pass), an elevation of 537m.

St. Declan, a fifth century saint who brought Christianity to the southern part of Ireland and who was associated with the Deise tribe in Waterford and south Tipperary, established his monastery in Ardmore and his grave there remains an important place of pilgrimage. Cashel was the seat of the Kings of Munster in Declan's lifetime and St. Declan's Way follows the route he would have taken from Ardmore to Cashel.

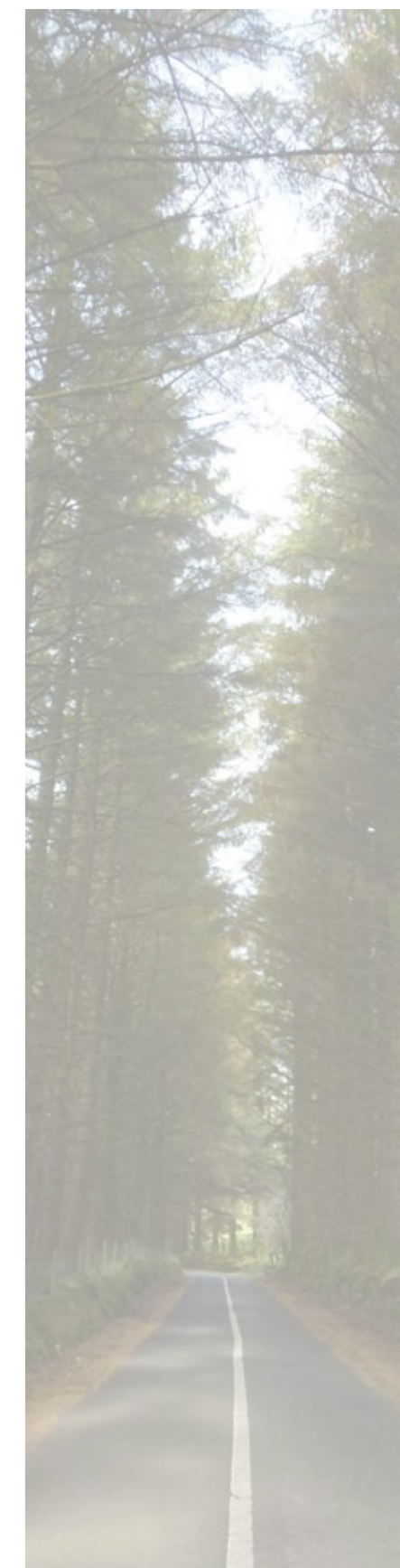
The first organised walk of the full length of the route took place on July 24th-28th 2013 to coincide with the St Declan's Feast Day and as part of The Gathering. The event, supported by The Gathering initiative, South Tipperary Development Company, Knockmealdowns Active (Tipperary) and Knockmealdown Forum (Waterford) saw 110 walkers from Australia, USA, Canada, UK, Cayman Islands and Ireland participate, walking 20km per day for five days. The participants walked from Cashel to Cahir on the first day; Cahir to Ardinnan on the 2nd; ascended the Knockmealdown Mountains at Goatenbridge, passing over the Bottleneck Pass to Lismore on the 3rd; a relatively flat walk from Lismore to Aglish on the 4th; and finally Aglish to Ardmore through the Waterford countryside on the 5th.



<http://www.knockmealdownactive.com/active/walks/st-declans-way-walk-ardmore-to-cashel/>

In addition an informal but easily accessible linear trail, marked by the County Wall, follows the ridge of the Knockmealdowns range from east to west between counties Waterford and Tipperary.

The location of the long distance walking routes is shown on *Map 5: Study Area Walking Routes and Hubs*.





Loop, Linear and Sli na Slainte Walks

There are wide ranges of shorter walking routes throughout the study area to suit all tastes. These include Fáilte Ireland loop walks, linear trails, Sli na Slainte trails with 90 walks identified through the audit. Some of these are within forest parks on the mountains such as those in the Glenanaar Forest on Ballyhoura Mountain; others include river walks such as Keale River Walk between Ballyronan and Glenroe. Some particularly suit families such as the spectacular Mahon Falls Walk, Baylough walks or the walks from Cahir to Swiss Cottage.

For keen walkers who wish to experience the outstanding views in the area the mountain walks, such as the four Comeragh walks from the Nire Valley car park or the Galty Climb from Galty Castle Woods, offer an exciting and strenuous walk.

These walks are promoted and marketed through a range of different organisations including:

- Fáilte Ireland (loop walks)
- Visit Ballyhoura
- Waterford County Council (the excellent Walk Waterford brochure)
- Irish Trails website
- Knockmealdown Active website
- Glen of Aherlow Fáilte
- Initiatives such as the Tipperary 10

Some walks are unmarked such as the summit climbs in the Knockmealdowns, Comeraghs and Galtee Mountains.

These walks range from less than an hour to longer walks up to 3-5 hours. A full list can be found in Appendix A3 and the location of walking hubs, where the majority of walks start and finish, is shown on *Map 5: Study Area Walking Routes and Hubs*.

Ballyhoura Mountain Area

- Ardpark: Ballinboola Woods Loop Walk⁷, Knockduv Loop Walk⁸
- Farrahy: Bowenscourt Graigue
- Ballyorgan: Ballyorgan Loop Walk, Lyre na Freaghaun Loop Walk, Keale River Walk (7km river walk between the two villages of Glenroe and Ballyorgan), Darragh Hills⁹
- Doneraile Loops
- Shanballymore River Loop Walks
- Ballyhoura Mountain: Canon Shehan Loop Walk¹⁰ (Glenanaar Forest), Justices Glen – Mass Rock Loop Walk, Blackrock Loop Walk¹¹ (Seefin Summit Climb 528m)
- Glenbrohane: Sliabh Riadh Climb
- Kilfinane: Magniers Mountain Loop
- Kildorrery: River Walk Kildorrery
- Ballylanders: Bog Walk Ballylanders
- Mallow – Mallow Sli na Sliante

Comeraghs Mountain Area

- Nire Valley Car Park: Coumduala Loop Walk¹², Coumlara Loop Walk¹³, The Gap Walk, The Sgilloges Walk, Knockaun
- Fethard: Walk the Walls – Fethard's Medieval Walls, 2km (#8 Tipperary 10)

⁷ <http://www.discoverireland.ie/activities-adventure/ballinaboola-loop/80867>

⁸ <http://www.discoverireland.ie/activities-adventure/knockduv-loop/80866>

⁹ <http://www.discoverireland.ie/activities-adventure/darragh-hills-loop/80873>

¹⁰ <http://www.discoverireland.ie/Activities-Adventure/canon-sheehan-loop/71437>

¹¹ <http://www.discoverireland.ie/activities-adventure/blackrock-loop/62311>

¹² <http://www.discoverireland.ie/activities-adventure/coumduala-looped-walk/88728>

¹³ <http://www.discoverireland.ie/activities-adventure/coumlara-looped-walk/88727>

- Dungarvan: Colligan Wood – Greenane Loop¹⁴, Colligan Wood – Inchidrisla Loop¹⁵, Dungarvan Railway Walk, Dungarvan Sli na Slainte
- Rathgormack: Boolas Loop Walk¹⁶, An Rathbeag¹⁷, Lough Mohra Loop¹⁸, Glenpatrick Bridge Walk¹⁹
- Kilmacthomas: Mahon Falls Walk, Kilcooney Wood, Kilmacthomas Sli na Slainte
- Clonmel: A Hidden Gem – Dun Ui Faolain Loop 5km (#6 Tipperary 10), Glenbawn (Marlfield), Rath Beag, Fox Covert, Carey's Castle, Clonmel Sli na Slainte
- Carrick-on-Suir: Butlers & Castles – Carrick-on-Suir to Kilsheelan, 10km (Carrick-on-Suir) (#7 Tipperary 10)
- Knockaunapeebra Summit (769m)
- Stradbally: Stradbally Sli na Sliante

Galtees Mountain Area

- Anglesborough: Benard²⁰ Loop Walk, Paradise Hill Loop²¹
- Ballylanders: Bog Walk
- Kilfinane: Molanna Loop Walk²², Castle Gale Loop Walk²³
- Galbally: Darbey's Bed Loop Walk²⁴, River Walk Galbally, Galbally Moor Abbey

¹⁴ <http://www.discoverireland.ie/activities-adventure/colligan-wood-greenane-loop/80892>

¹⁵ <http://www.discoverireland.ie/activities-adventure/colligan-wood-inchidrisla-loop/80891>

¹⁶ <http://www.discoverireland.ie/activities-adventure/boolas-loop/89451>

¹⁷ <http://www.discoverireland.ie/activities-adventure/rath-beag-loop/75508>

¹⁸ <http://www.discoverireland.ie/activities-adventure/lough-mohra-loop/75509>

¹⁹ <http://www.discoverireland.ie/activities-adventure/glenpatrick-bridge-loop/75510>

²⁰ <http://www.discoverireland.ie/activities-adventure/benard-loop/80869>

²¹ <http://www.discoverireland.ie/activities-adventure/paradise-hill-loop/80868>

²² <http://www.discoverireland.ie/activities-adventure/molanna-looped-walk/88729>

²³ <http://www.discoverireland.ie/activities-adventure/castlegale-loop/80872>

²⁴ <http://www.discoverireland.ie/activities-adventure/darby-s-bed-loop/80871>

- Bansha: Bansha Wood
- Kilbehenny: Attychraan Loop²⁵ (Galtee Castle Wood), Galty Walk (Galtymore Mountain summit 919m)
- Glen of Aherlow: Lough Curra Loop, Lake Muskry Walk, Ballyhourigan Woods - Keeper Hill loop (Galtee views), Bianconi Loop²⁶, Woodland Loop, Millennium Stone Loop²⁷, Rock an Thorabh Loop²⁸, Glen of Aherlow – The Coach Road Walk, Slievenamuck (Greenwood Car Park), Carroll's Loop, Dolmen Loop, Pdraig's Stone Loop, Glen of Aherlow Nature Park, Loop the Loop in Ballinacourty – Glen of Aherlow, 11km (#3 Tipperary 10); If you go down to the woods today – Glengarra Wood, 2km (#4 Tipperary 10)
- Cahir: Capture the Castle – Cahir to Swiss Cottage, 2km (#2 Tipperary 10)
- Lisvarriane: Carroll's Loop²⁹, Dolmen Loop³⁰, Padraig's Loop³¹
- Cashel: Golden to the Rock of Cashel, 10km (#1 Tipperary 10)

Knockmealdown Mountain Area

- Clogheen: Knocknaclugga Loop Walk³² 268m, Clogheen Loop Walk, Shanrahan/Flemingstown, Summerhill (Clonmel Road), Killballyboy Wood
- Goatenbridge: Liam Lynch Loop³³, Knockballinrey Loop³⁴ Discover the Unknown – The Liam Lynch Loop, 14km (#5 Tipperary 10)

²⁵ <http://www.discoverireland.ie/activities-adventure/attychraan-loop/71643>

²⁶ <http://www.discoverireland.ie/activities-adventure/bianconi-loop/74074>

²⁷ <http://www.discoverireland.ie/activities-adventure/millennium-stone-loop/74098>

²⁸ <http://www.discoverireland.ie/activities-adventure/rock-an-thorabh-loop/74077>

²⁹ <http://www.discoverireland.ie/activities-adventure/carroll-s-loop/74104>

³⁰ <http://www.discoverireland.ie/activities-adventure/dolmen-loop/74108>

³¹ <http://www.discoverireland.ie/activities-adventure/pdraig-s-loop/74106>

³² <http://www.discoverireland.ie/activities-adventure/knocknaclugga-loop/74113>

³³ <http://www.discoverireland.ie/activities-adventure/liam-lynch-loop/80955>

³⁴ <http://www.discoverireland.ie/activities-adventure/knockballinrey-loop/80887>

- Newcastle: Tullaghmeelan Walk, Glenn Beag Loop³⁵, Knockperry Walk, Deisc Walk
- Ballyporeen: Gorteeshal Walk, Lyrefune Walk
- Cappoquin: Mount Melleray Abbey Walk, Glenshelane Forest Walks
- The Vee car park east: Sugar Loaf (663m)/Knockmoylan 768m)/Knockmealdown (794m) summits
- Baylough Car Park (Lismore/Cappoquin road from Clogheen): Knockshanahullion (652m)/Knocknalougha (630m) summits, Baylough walks
- Ballysaggartsmore: The Towers Walk
- Lismore: Round Hill Walk, Lady Louisa's Walk
- Fermoy: Barane Loop Walk
- Kilworth: Kilworth Sli na Slainte

Walks within the secondary study area include:

- Waterford: Nature Park Walks
- Ardmore: Nature Park Walks
- Tramore: Doneraile Walk, Dunes Walk
- Murroe nr Cappamore: Clare Glens Walk, Nature Loop Walk
- Pilltown: Mountain Grove Loop (Pilltown Mtn)
- Banteer: Mount Hillary Loop
- Killavullen: Killavullen Loop Walk (Nagles Mtns)



³⁵ <http://www.discoverireland.ie/activities-adventure/gleann-beag-loop/80895>

The Tipperary 10

Galtee Mountain Area

1. Golden to the Rock of Cashel, 10km (Golden/Cashel) (Tipperary 10)
2. Capture the Castle – Cahir to Swiss Cottage, 2km (Cahir) (Tipperary 10)
3. Loop the Loop in Ballinacourty – Glen of Aherlow, 11km (Lisvarriane) (Tipperary 10)
4. If you go down to the woods today – Glengarra Wood, 2km (Btwn Cahir & Mitchelstown) (Tipperary 10)

Knockmealdown Mountain Area

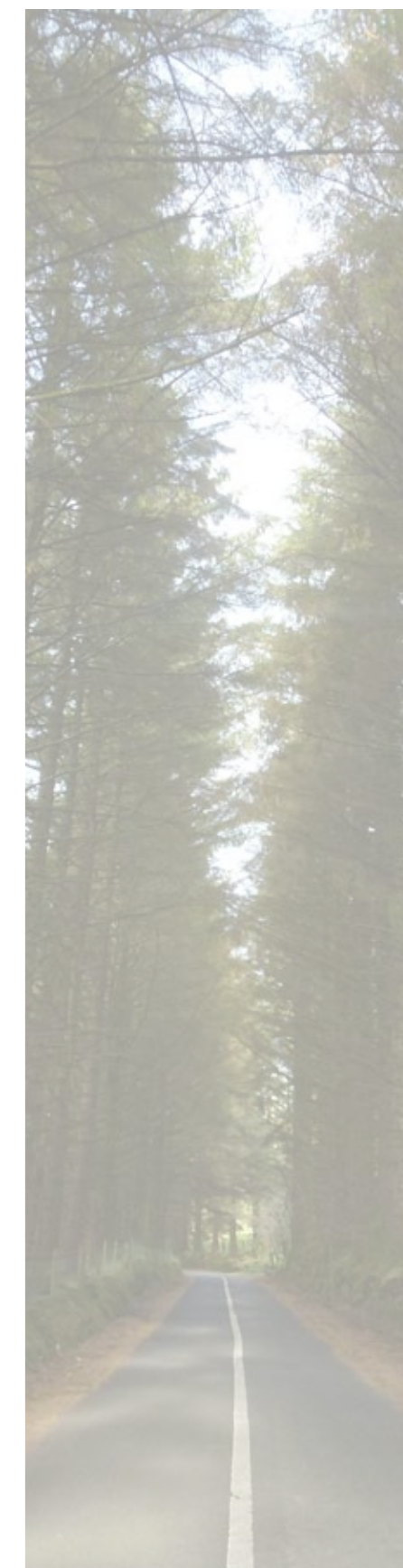
5. Discover the Unknown – The Liam Lynch Loop, 14km (Goatenbridge) (Tipperary 10)

Comeragh Mountain Area

6. A Hidden Gem – Dun Ui Faoilain Loop, 5km (Clonmel) (Tipperary 10)
7. Butlers & Castles – Carrick-on-Suir to Kilsheelan, 10km (Carrick-on-Suir) (Tipperary 10)
8. Walk the Walls – Fethard's Medieval Walls, 2km (Fethard) (Tipperary 10)

The final 2 walks on the route lie to the north of the study area:

9. Bogs & Butterflies – Lough Doire Bhile Loop, 3km (Glengoogle/New Birmingham) (Tipperary 10)
10. Overlooking Kilcooley – Grange Crag Loop, 6km ((Glengoogle/New Birmingham) (Tipperary 10)





Historic Town Walks

Reflecting the significant built and cultural heritage of the area there are several historic town trails in the towns of the area. These trails, implemented by Fáilte Ireland and the relevant local authorities during 2008-2011, include:

- Cashel
- Clonmel
- Tipperary
- Cahir
- Carrick-on-Suir
- Fethard
- Mitchelstown

Historic town walks that have been implemented outside of the Fáilte Ireland programme include:

- Kilmallock Town Trail
- Mallow, The Rebel Trail

The location of the historic walking routes is shown on Map 4: Study Area Walking Routes and Hubs.

Walking Clubs

- Knockmealdowns Walking Club
- Ballyhoura Bears Walking Club
- Galtee Walking Club
- Comeragh Mountains – Muddy Boots, Ballymacarbry

Activity Operators

- Walking Holidays Cnoc Na Ri Country Home, Ballymacarbry
- Walking Holidays Glasha Farmhouse, Ballymacarbry
- Aherlow Walks with Michael Moroney
- Rathgormack Hiking Centre

Walking Festivals

There are several walking festivals in the area. These include:

Ballyhoura Mountains Area

- Ballyhoura International Walking Festival (Ballyhoura,

Galtees & Glen of Aherlow)

- Ballyhoura Autumn Rambling Festival
- Ballyhoura Country Walk of the Blackrock Loop
- Walking Tour of the Griston Bog Outdoor Classroom

Comeragh Mountains Area

- Walk Waterford Autumn Season – Kilmacthomas/Lemybrien
- Nire Valley Drop
- Comeragh Mountains Autumn Walking Festival
- Walk Waterford Autumn Season (Dungarvan)

Knockmealdowns Mountains Area

- Walk Waterford Autumn Series – Lismore/Ballysaggart Towers

Galtee Mountains Area

- Glen of Aherlow Winter Walking Festival
- Comeragh Wild Festival



3.5.2 Cycling

Mountain-biking – Ballyhoura Mountain Bike Trails

The trails were designed by world famous trail designer Dafydd Davies and include 90km (to be extended by 50% in 2014) of trails through undulating forest with views over the surrounding countryside. Nearby villages include Ardpatrik, Ballyorgan, Doneraile, Kilfinane and Kilmallock.

The one-way colour-coded trails include narrow single-track and boardwalk sections with forest road climbs. There are currently five loops, each of which leads onto the next. The trail head area includes car-parking, the Trail-riders mountain bike hire and sales outlet, and the Coillte map-boards, toilets, showers, and bike wash facilities.

The trail loops are described in the trail brochure as follows:

- **Greenwood Loop** This is the first of five loops in the trail system in the Ballyhouras and is called the Green Wood loop. This trail takes you through the lush hillsides underneath Seefin Mountain and Black Rock and is used as the outward and inward legs for the rest of the trail network.
Length: 6 kilometre, Time 30mins-1hr, Grade: Moderate, Metres Climb: 110m, Trail colour: Green.
- **Mountrussell Loop** The Mountrussell Loop is a more technical and physically demanding version of the Greenwood Loop and follows this as far as Waypoint 1, from where the trails become a bit more technical, narrower, rockier and steeper with more climbing and more descending.
Length: 17 kilometres, Time: 2hrs, Grade: Moderate/Difficult, Metres climb: 150m, Trail colour: Brown.
- **Garrane Loop** The Garrane Loop ventures westwards from Waypoint 3 taking in some long and fast single-track descents as well as some long and demanding climbs on forest roads, tracks and single-track trails.
Length: 35 kilometres, Time: 1.5-3hrs, Grade: Difficult, Metres Climb: 200m, Trail colour: White.

- **Streamhill Loop** The Streamhill Loop provides an initial detour from the Garrane Loop giving a longer ride before rejoining to climb higher into the mountains. It detours again from the Garrane Loop higher up and starts some of the most demanding of the trails here with fast descents and longer climbs.
Length: 41 kilometres, Time: 5hrs, Grade: Severe, Metres Climb: 830m, Trail colour: Blue.
- **Castlepook Loop** This is the ultimate loop of the Ballyhoura trails, being the longest and most demanding. It goes right to the southern fringes of the forest and presents you with the biggest climbs and most rewarding descents. Be prepared!
Length: 51km, Time: 4-5 hours, Grade: Severe, Metres Climb: 280m, Trail colour: Red

Cycle Trails

- Cliffs, Coves and Mountains Cycling Tour: 210km route through Waterford³⁶

Within the secondary study area:

- Glen of Aherlow Cycle Route – 67km route from Cashel – Glen of Aherlow – Cashel



³⁶ <http://www.discoverireland.ie/Activities-Adventure/cliffs-coves-and-mountains-cycling-tour/45035>

Cycle Routes from Towns

Kilmallock Cycle Hub³⁷: The historic town of Kilmallock is a cycle hub and has several trails which lead out into the surrounding countryside. These trails have views of the Ballyhoura and Galtee Mountains and heritage sites in the surrounding landscape.

- **Loop 1: 70kms - 5 hours and Loop 1A: 22kms - 1½ hours:** Route 1 is a circuit around the periphery of the Ballyhoura Mountains. The road follows the contours of the mountain foothills to the town of Doneraile, where there are ample opportunities for refreshment. There is one major climb on the eastern leg of the circuit; the mountain pass between Glenosheen and Glenanaar. Ascending to 307 metres you will encounter outstanding scenery here to reward your efforts. The entrance to the specially developed Ballyhoura Mountain Bike centre is located along this section.
- **Loop 2: 83 kms - 5½ hours, Loop 2A: 16 kms - 1 hour, Loop 2B: 41 kms - 3 hours, Loop 2C: 64 kms - 4+ hours:** Route 2 is a trip east to the Glen of Aherlow. There are fine views of Seefin, the highest peak of the Ballyhouras and of Galtymore Mountain. Having negotiated the first hill at Slieveareagh you arrive into the beginnings of the Glen of Aherlow where you can decide which of the shortcut options are appropriate. Continuing on into the heartland of the glen, past the villages of Galbally and Lisvarane you will finally encounter the iconic and very steep climb of Aherlow. Although not a particularly long climb, the tortuous hairpins and the magnificent views from the Christ the King statue make this “one to remember” for those who complete the entire circuit.

³⁷ <http://www.discoverireland.ie/Activities-Adventure/kilmallock-cycle-hub/87476>

- **Loop 3: 62 kms:** Route 3 is a leisurely spin to the amenity area at the scenic Lough Gur. Take time to visit the stone forts at Carraig Aille (7th - 11th Century). Other castles and archaeological remains are also to be seen nearby. The area between Lough Gur and Knockainey is composed of short steep hills, but elsewhere on the route the gradients are gentle. The roads are quiet and relatively traffic free. Watch out for the De Valera cottage near Bruree, childhood home of Ireland's third president.
- **Loop 4: 70 kms:** Loop 4 is a shorter spin around some pleasant wooded hills near the townlands of Glenroe and Castle Oliver. You will pass the ornate gatehouses of the privately owned castle as you cruise along these secluded roads. Refreshments may be had at Ardpark or Kilfinane.

Clonmel

- Range of routes

Carrick-on-Suir

- Carrick on Suir – Mahon Bridge – Mahon Falls – Carrick-on-Suir (38km)
- Carrick-on-Suir to Crotty's Lake taking in part of the Comeragh Mountains (22km)

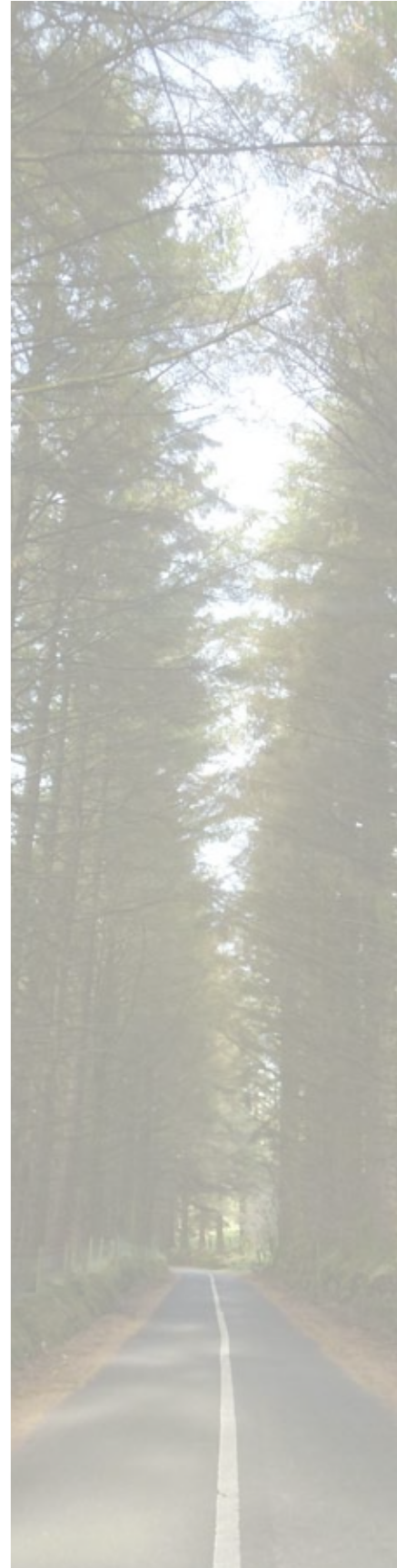
Dungarvan

- Dungarvan to Waterford cycle route (along disused rail line).

Fáilte Ireland recommends³⁸ the following cycle routes:

- Dungarvan/Clashmore-Villierstown (40miles/64km)
- Dungarvan-Cappoquin-MountMellera (40miles/ 64km)

³⁸ <http://www.discoverireland.ie/Activities-Adventure/cycling-routes-from-dungarvan/8549>





- Dungarvan-Ballymacarbry-Nire Valley-Clonmel (44miles/ 72km)
- Dungarvan-Touraneena-Ballinamult-Modeligo (40miles/72km)
- Dungarvan-Ardmore-Ring (39miles/48km)

Lismore

Fáilte Ireland recommends³⁹ the following cycle routes:

- Lismore-Ballyduff Upper-Tallow (30miles/48km). Highlights: Lismore Castle Gardens and Lismore Heritage Centre
- Lismore-The Vee-Clogheen (40miles/64km). Highlights: River/mountain scenery
- Lismore-Ballyduff Upper-Araglin (30miles/48km). Highlights: Mountain scenery

Cappoquin

Fáilte Ireland recommends⁴⁰ the following tours:

- Cappoquin-Ballyduff-Tallow Bridge-Lismore- 45miles/ 72kmHighlights: Lismore Castle Gardens, Lismore Heritage Centre and river scenery.
- Cappoquin-Ballinamult-Millstreet-Modeligo- 45miles/ 72km
- Cappoquin- The Vee-Clogheen- 45miles/72km Highlights: The Comeragh Mountains which contain many fine corrie lakes, the most famous being Coumshingaun, which is the finest example of a corrie (cirque) lake in the British Isles.

³⁹ <http://www.discoverireland.ie/Activities-Adventure/cycling-routes-from-lismore/8550>

⁴⁰ <http://www.discoverireland.ie/Activities-Adventure/tours-from-cappoquin/8551>

Cashel

Fáilte Ireland recommends⁴¹ the following cycle tours:

- Cashel-Golden-Tipperary-Aherlow-Bansha-Cahir-Cashel. 67km/42 miles Highlights: Glen of Aherlow, forest parks.
- Cashel-Clonmel-Cahir-New Inn-Cashel. 59km/37 miles Highlights: Tolling parkland, County Museum- Clonmel, Museum of Transport –Richmond Hill, St Patrick's Well (1.5miles from Clonmel Town centre on Cahir Road), river scenery and Marlfield Nature Reserve.

Outside of the study Fáilte Ireland recommends cycle trails in Waterford:

Fáilte Ireland recommends⁴² the following tours:

- Waterford-Passage East-Woodstown-Dunmore East. (40miles/64km). Highlights: Reginald's Tower, The House of Waterford Crystal, Waterford Museum of Treasures - The Granary Building
- Waterford-Portlaw-Carrick-On-Suir (40miles/64km). Highlights: Curraghmore Estate, Portlaw and Ormond Castle, Carrick-On-Suir.
- Waterford-Bunmahon-Kill (28miles/44km). Highlights: Coastal scenery and Copper Coast - The Copper Coast gets its name from the 19th Century copper mines that lie at its heart. It comprises some 25km of spectacular coastline consisting of scalloped beaches and coves buttressed and enclosed by rocky headlands. Oceans, volcanoes, deserts and ice sheets all combined to create the rocks which provide the physical foundation of the natural and cultural landscapes of the Copper Coast.

⁴¹ <http://www.discoverireland.ie/Activities-Adventure/tours-from-cashel/8557>

⁴² <http://www.discoverireland.ie/Activities-Adventure/tours-from-waterford/8547>

Bike Hire & Repair

Bikes can be hired from:

- Trailriders (Ballyhoura Forest)
- Springhouse B&B (Kilshane)

Bike repair shops include:

- Kilmallock Cycles

Bike Tours are available from:

- Lismore Cycling Holidays offer a 5-day cycling tour with baggage transfer from Lismore-Melleray-Cahir-Cashel-Holycross-Roscrea-Abbeylix-Kilkenny)
- Tramore Bike Tours

Cycling Clubs include:

- Comeragh Cycling Club
- Sportif Waterford Cycling Club
- Dungarvan Cycling Club
- Waterford Racing Club
- Tipperary Wheelers Cycling and Triathlon Club
- South Tipperary Cycling Club (Clogheen/Cahir/Ardfinnan)
- Clonmel Cycling Club
- Kilbehenny Cycling Club
- Dan Morrissey Carrick Wheelers – Carrick on Suir
- Carrick Touring Club – Carrick on Suir
- Kilmallock Cycling Club
- Fermoy Cycling Club
- Galtee Wheelers (Mitchelstown)
- Kilworth Cycling Club
- Mallow Cycling Club

3.5.3 Angling

The study area contains several **fisheries** which are renowned for angling. These include large rivers such as the Suir and Blackwater; smaller rivers such as the Nire, Funcheon and Linguan; lakes such as those in the Comerghs, Ballyhass Lakes and Glenahiry Lake near Ballymacarbry; and the Ballyshunnock Reservoir near Kilmacthomas. Cahir was designated a Centre of Angling Excellence for Brown Trout by Failte Ireland due to the quality of the angling on offer in combination with a range of accommodation, ancillary services in the area and multi-user access to the river bank.

There are several **angling clubs** in the area such as the Cahir Angling Association and Cappelquin Salmon and Trout Anglers Association. One of the best **tackle shops** in the country is located near Ballymacarbry - Clonanav Fly Fishing which also offer guided fishing trips.

Local **activity operators** include Ballyhass Lakes Activity Centre Fishing and Holiday Accommodation, Ghillie Cottage and Blackwater Fly Fishing (Fermoy), Blackwater Lodge & Fishery (Upper Ballyduff) and Cahir-based ghillies Kevin Rowe and Paul Burke. Fishing **permits** are available from Dungarvan Discover Ireland Centre.

Sea angling operators are based in Dungarvan including Sea Angling & Diving Charter, Sea Fishing Brian Barton and Sea Fishing John and Coin McGarry.

Fisheries

- Ballyhass Lakes
- Blackwater River
- River Suir
- Suir Valley Fishery, Clonmel
- River Nire, Clonmel
- Cappagh Lakes, Dungarvan
- River Funcheon, Fermoy
- Comeragh Mountain Lakes, Ballymacarbry
- Glenahiry Lake, Ballymacarbry

- Linguan River, Carrick on Suir
- River Tar, Clogheen
- Ballyshunnock Reservoir, Kilmacthomas
- Multeen River, Cashel

Within the secondary study area:

- Camoge River, Croom
- Ballyshunnock Reservoir, Kilmeaden
- The Blackwater System, Macroom
- Ballyshunnock Reservoir, Portlaw
- Portlaw Clodiagh River, Portlaw
- Knockaderry Reservoir, Waterford City
- River Bride, Tallow

Angling Clubs

- Cahir Angling Association (Suir)
- Cappelquin Salmon and Trout Anglers Association (Blackwater)

Tackle Shops

- Clonanav Fly Fishing, Ballymacarbry

Activity Operators

- Ballyhass Lakes Activity Centre Fishing and Holiday Accommodation
- Ghillie Cottage And Blackwater Fly Fishing, Fermoy
- Blackwater Lodge & Fishery, Upper Ballyduff
- Cahir Angler – Kevin Rowe, Cahir
- Cahir Angler – Paul Burke, Cahir

Fishing permits available from Dungarvan Discover Ireland Centre.

Angling licences needed for Salmon and Trout fishing may be secured from Casale 2000, Bank Place, Cashel. 062 63106.

Trout Licence:- Cashel-Golden, Tipperary Angling Association, Cahervillahow. 062 72354.

Sea-Angling Operators

- Sea Angling & Diving Charter, Dungarvan
- Sea Fishing Brian Barton, Dungarvan
- Sea Fishing John and Coin McGarry Dungarvan

3.5.4 Kayaking/Canoeing

- Ballyhass Lakes Activity Centre Fishing and Holiday Accommodation

Kayaking and Canoeing is also offered by the multi-activity providers, see section 3.5.19 below.

3.5.5 Sailing and Watersports

- Dungarvan Harbour Sailing Club
- Carrick on Suir Marina

Within the secondary study area:

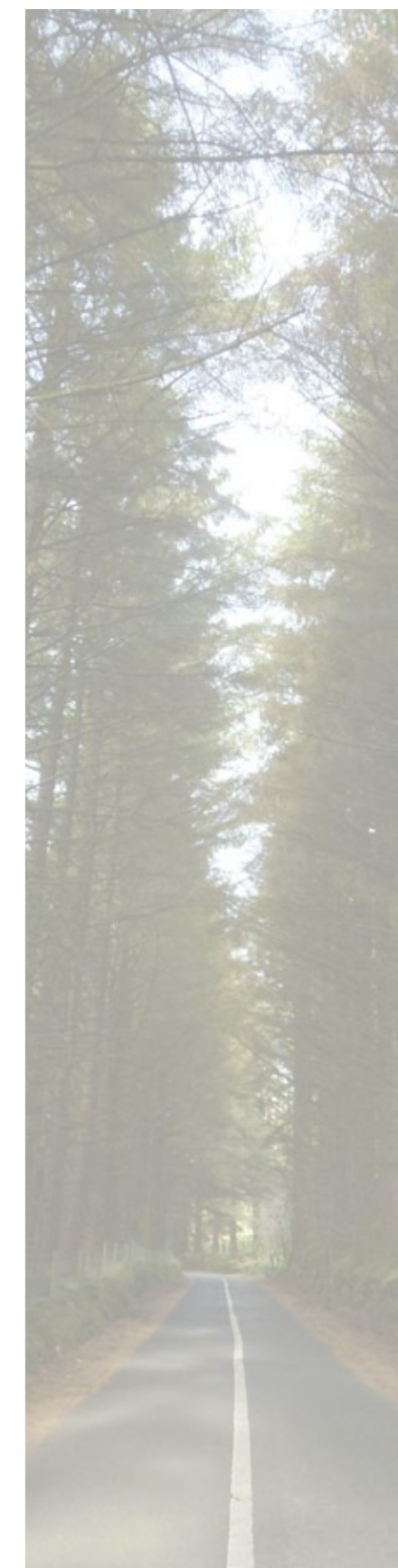
- Seapaddling.com, Fenor
- Waterford City Marina
- Ardmore Diving

3.5.6 Orienteering/Hill-running

- Ballyhoura Orienteering, Kilfinnane
- Beast of Ballyhoura Adventure Race, Kilfinnane

3.5.7 Equestrian

- Cahir Equestrian Centre
- Whitechurch Riding School, Carrick-on-Suir





- Hillview Riding School, Dungarvan
- Hillcrest Riding Centre, Galbally
- Ballyhoura Horse Trails
- Eden Hill Language and Equestrian Centre, Mallow

Within the secondary study area:

- Tory Hill Equine Assisted Learning Centre, Croom
- Belline Equestrian Centre, Pilltown
- Stonehaven Equestrian Centre, Waterford

3.5.8 Bird-watching

- Nire Valley
- Clonea, Dungarvan

3.5.9 Golf

Golf Courses

- Cahir Park Golf Club
- Carrick-on-Suir Golf Club
- Tinhalla Golf Course, Carrick on Suir
- Charleville Golf Club
- Clonmel Golf Club
- Slievenamon Golf Club, Clonmel
- Doneraile Golf Club
- Dungarvan Golf Club
- Gold Coast Golf Club, Dungarvan
- West Waterford Golf Club, Dungarvan
- Fermoy Golf Club
- Lismore Golf Club
- Ballinamona Golf Course, Mallow
- Mallow Golf Club

- Mitchelstown Golf Club
- Tipperary Golf Club
- Dundrum House Golf Course, Tipperary
- Larkspur Pitch & Putt Club, Cashel

Within the secondary study area:

- Faithlegg Golf Club, Waterford
- Waterford Golf Club, Waterford
- Waterford Castle Golf Club, Waterford
- Williamstown Golf Club, Waterford
- Kanturk Golf Club, Kanturk
- Ballykisteen Golf & Country Club, Limerick Junction
- Castlelyons Pitch & Putt Club

Driving Ranges

- Ivory Park Driving Range, Fermoy
- Mallow Golf Driving Range, Mallow

Tuition

- Tim Murphy Golf Lessons, Lismore

Passes

- The Suir Valley Challenge Golf Pass

3.5.10 Para-gliding

Paragliding takes place in **Tipperary** with Midland Paragliding in Tipperary Town offering paragliding in many locations, including the Galtee Mountains.

3.5.11 Country Pursuits

Clay pigeon shooting is offered at Lazy Dog Clay Pigeon Shooting at Ballintubber near **Kilfinane**.

3.5.12 Rowing

Rowing clubs are located at **Clonmel** and **Fermoy**.

3.5.13 Quad-biking

Quad bikes can be hired in **Kilworth** at Glenquads (Kilworth) Ltd

3.5.14 Paintball

Paintball activities take place in **Dungarvan** at Delta Force Paintball.

3.5.15 Rally Driving

- Rally Connection Ltd, Dungarvan

3.5.16 Roadbowling

- Roadbowling takes place on Friday's at 7pm between April to September on the Castletownroche Road near Doneraile

Within the secondary study area:

- Copper Coast Road Bowling Tuition, Fenor

3.5.17 Surfing

None within the primary study area

Within the secondary study area:

- Freedom Surf School and Adventure, Tramore

- Oceanics Surf School, Tramore
- T-Bay Surf and Eco Centre, Tramore
- Tramore Adventure Centre

3.5.18 Helicopter Lessons

- Gaelic Helicopters, Mallow

3.5.19 Multi-activity Providers

- **Ballyhass Lakes Activity Centre Fishing and Holiday Accommodation** offers a range of pursuits including angling, kayaking, raft-building, trout fishing, rock-climbing, abseiling, low ropes courses and archery
- **Blackwater Outdoor Activities**, Fermoy
- **Kilfinane Outdoor Education Centre** offers canoeing, kayaking, raft-building, river-walking, mountain-biking, rock-climbing, abseiling, indoor climbing, orienteering, team challenges, camp-craft for youths, schools and adults
- **Galtee Valley Extreme Adventures**, Mitchelstown offers archery, dune buggies, zorbing, giant foosball, sumo wrestling, giant jenga, sniper shot, radio controlled cars, obstacle course, airsoft

Within the secondary study area:

- **Ardmore Adventures** (sea kayaking, surfing, rock-climbing)
- **Dunmore East Adventure Centre** (surfing, canoeing, sailing, archery and rock-climbing)

3.6 Built Heritage

The Munster Peaks area has a diverse range and number of built heritage attractions, listed in Appendix A4: Product Audit Detail, including pre-historic, medieval including religious buildings, and later structures of significance.

The Munster Peaks study area contains a wide range of nationally significant built heritage. While the mountain uplands generally do not contain any significant built heritage, the many towns surrounding them have rich histories reflected in the castles, houses, churches and abbeys to be found within or nearby them.

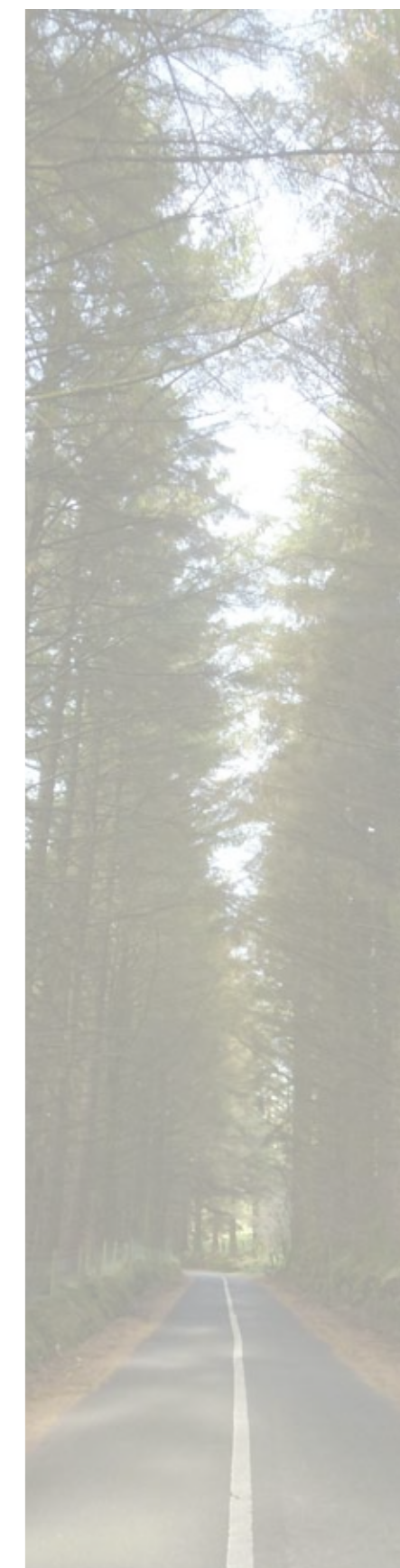
3.6.1 Pre-Historic Structures

These include megaliths such as the Labbacallee Wedge Tomb near **Glanworth**, the largest of all Irish wedge tombs, known as the Hag's Bed and estimated to date to 2300BC. Two miles to the north of **Kilfinane**, the Cush Earthworks contain an extensive complex of ancient fields and enclosures and excavations have indicated that the site was continuously occupied by an agricultural community from around 1000 BC to 400 AD. Darbey's Bed megalithic tomb is located at Galbally, Co. Limerick. In addition here are many ringforts and other archaeological features spread throughout the study area.

3.6.2 Medieval Structures

These include buildings such as those on the Rock of **Cashel**, **Cahir** Castle, The Main Guard in Clonmel, Ormond Castle in **Carrick-on-Suir**, **Lismore** Castle, King John's Norman Castle in **Dungarvan**, the many structures in **Kilmallock** such as the Town Gate, town centre buildings and the religious heritage, **Doneraile** Court, Kilbolane Castle near **Charleville** and **Fethard's** medieval town walls.

- **Rock of Cashel** is the most popular visitor attraction in the study area that supplies data to Fáilte Ireland. It is also one of the most popular and spectacular heritage attractions in the country. The site was the traditional seat of the Kings of Munster for several hundred years prior to the Norman invasion and is reputed to be the site of the conversion of the King of Munster by St Patrick in the 5th Century. The earliest structures on the site date from the 12th and 13th centuries and include Cormac's Chapel, the Cathedral, and the Hall of the Vicar's Choral. The site is now managed by the OPW.
- **The Main Guard** in Clonmel was built in 1675 by the Duke of Ormond as a courthouse. In the 1800's shops were built on the ground floor, a loggia of open arches, and removed in the 1990's before an extensive period of renovation by the OPW returned the building to its original form. There is an unsubstantiated claim that Christopher Wren designed the building which originally housed the main guard of town troops for Clonmel. The Main Guard is open to visitors from March to September and is managed by the OPW.
- **Cahir Castle** is the second most popular heritage attraction in the study area that supplies data to Fáilte Ireland and is one of Ireland's largest and best preserved castles. Once home to the Butler family the castle was built in 1142 by Conor O'Brien on the site of an earlier cathair (stone fort) from which the town and castle gets its name. It is located on a rocky island in the River Suir and retains much of its original keep, tower and walls, one of which still has a cannon ball embedded within it. The castle is open to visitors all year round with a guided tour and audio-visual shows in multiple languages and is managed by the OPW.
- **Ormond Castle** is the best example of an Elizabethan manor house in Ireland. Built by Thomas 10th Earl of Ormond in the 1560's it was built on a strategic position alongside the River Suir. The fine state rooms contain some of the most exceptional decorative plasterwork in the country. Guided tours are available between March and September and the building is managed by the OPW.





- **King John's Norman Castle** in Dungarvan dates from 1185 in a very strategic location at the mouth of the River Colligan where ships and soldiers could guard the narrow stretch of land at the base of the Comeragh Mountains which linked east and west Waterford. While archaeological investigations have revealed evidence of pre-Norman settlements the keep of the castle is the earliest structure and was built in 1185 by King John of England. Within the curtain wall is a two-storey military barracks dating from the 18th Century. The barracks have been restored and house a visitor exhibition which tells the story of the castle. The castle is managed by the OPW.
- **Kilmallock** or *Cill Mocheallóg* is an ancient town and Saint Mocheallóg is thought to have built a church in the area in the 6th or 7th Century. The town was an important trading town in the mediaeval era and the stronghold of the Earls of Desmond, a legacy that is seen in those structures that date from the 13th to 17th centuries i.e. the **town wall**, the **Collegiate Church** and the **Dominican Priory of Kilmallock**. The Priory was founded in 1291 and, although badly damaged in 1648, retains a five-light west window – considered one of the best examples in the country. The 15th Century **King John's Castle** – a four-storey tower at the end of Sarsfield Street - may have been part of the original northern gate entrance to the town. The 16th Century **merchant houses and Blossom Gate** which is the sole surviving gate of the medieval town wall, Due to its strategic position the town was a key location for government administration up to the end of the 17th Century. However it declined in importance once a new route between Cork and Limerick via Charleville was opened up in the 19th Century.

- **Doneraile Court and Wildlife Park**⁴³ stands on land that was renowned as good quality farmland since pre-Norman times. The name is derived from *Dún ar Aill*, meaning 'the fort on the cliff', and the site of ancient nearby fort. A Doneraile Castle was built around 1402, this was rebuilt in the 1660's and the present Doneraile Court dates from somewhere between the late 17th Century and 1725, the date on the front of the house. The type of horse-race known as a steeplechase originated from a race held in 1752 between the church steeples of Doneraile town and nearby Buttevant. Doneraile Farmers Market takes place every fortnight in the courtyard of Doneraile Court beside the newly renovated tearooms. The gardens extend to over 166 ha and are an exceptional example of landscaping in the style of Capability Brown. The park contains deer herds, multi-access pathways, a children's playground, water features and groves of trees. Parts of the house are being restored and the house is managed by the OPW.
- **Fethard's Town Walls** are an outstanding example of surviving mediaeval town walls, constructed as part of Edward 1st policy of establishing fortified market villages around 1292 and in response to increasing lawlessness in the Norman colony in Ireland. At that time Fethard was a prosperous town with goods sold including silk, wine-skins, sea fish, coal, nails, timbers and salt. The Walls rise to a height of 7.6m (25ft) and are the most complete example in Ireland. They were paid for by a tax on goods sold in the village. There is a historic town walk around the Walls, with interpretation about their construction and the history of the town.

The study area contains a wide range of medieval religious built heritage including:

- Abbeys (**Cappoquin, Galbally, Mount Melleray**)
- Priors (**Buttevant, Kilmallock**)
- Friaries (**Kilmallock** which dates to 1291)

⁴³ <http://www.iol.ie/~nodonnel/doncourt.htm>

- Cathedrals (**Cashel, Lismore**)
- Significant churches: (Kiflyn Church in **Buttevant**, St Pauls Church and Cahir Abbey in Cahir, Old St Mary's Church in **Clonmel, Kilbehenny** Medieval Church, the 13th Century Collegiate Church in **Kilmallock** and **Stradbally** Mediaeval Church.

Medieval structures outside the primary study area include **Liscarroll** (Liscarroll Castle).

- **Liscarroll Castle** was probably constructed by the de Barry family in the late 13th Century on the site of a palisaded Norman castle built by Philip de Barry in the 12th Century. The castle is the 3rd largest of Ireland's 13th century castles and remains in good condition with a large entrance gateway still retaining traces of the portcullis. In 1625 the castle was acquired by Sir Philip Perceval, taken by Lord Castlehaven for the Irish in the Irish Confederate Wars in 1642 and returned to the Percevals during Cromwellian times.



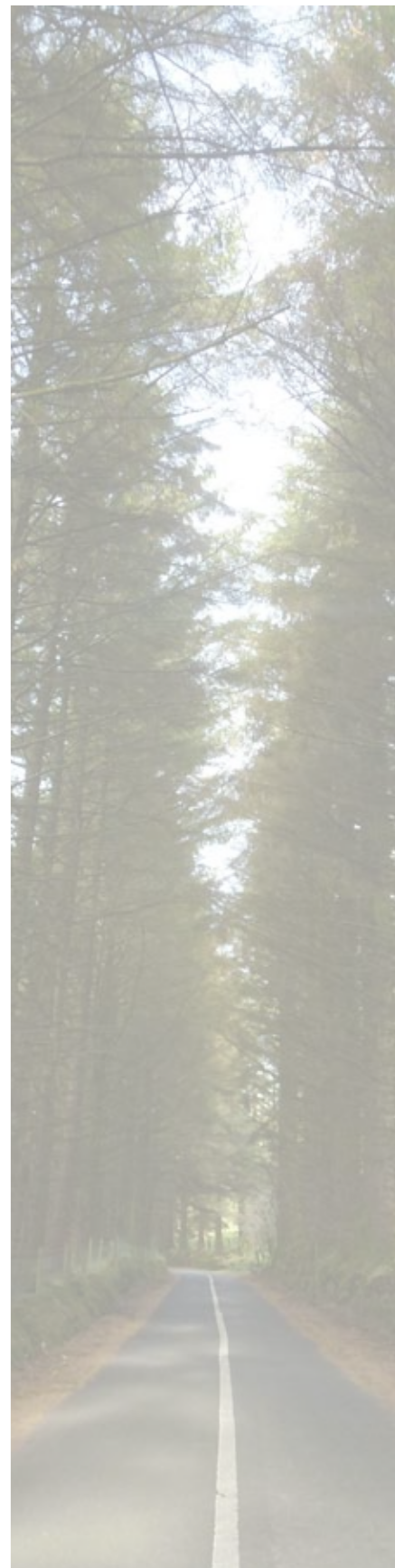
3.6.3 Later Structures

These include **Lismore** Castle, Swiss Cottage at **Cahir**; **Charleville** Castle, **Cappoquin** House and Gardens; Tourin House near **Cappoquin**, Mobarnane House near **Fethard** and **Mount Melleray Abbey** near Cappoquin.

- **Lismore Castle** is located on a site originally occupied by Lismore Abbey, an important monastery established in the 7th Century and which remained an ecclesiastical centre until at least the late 12th Century. Once owned by Sir Walter Raleigh a substantial castle was built on the site in the 16th century by Richard Boyle later 1st Earl of Cork. The famous chemist Robert Boyle, the 14th of the Earl's 15 children, was born here in 1627. The castle was acquired by the Cavendish family in 1753 and was transformed by the 6th Duke in the early 19th century to its present Gothic form using the skills of Sir Joseph Paxton, the designer of London's Crystal Palace. The castle remains privately owned by the Duke of Devonshire with the family's private apartments available for rent for most of the year. A contemporary art gallery, Lismore Castle Arts, opened in the castle in 2004 and the gardens, including the 17th Century walled garden, are open to the public.
- **Swiss Cottage** Swiss Cottage near Cahir is the 4th most popular visitor attraction supplying data to Fáilte Ireland within the study area which, along with Cahir Castle, makes Cahir a heritage hub. The cottage, built around 1810, is a fine example of cottage ornée, or ornamental cottage and is likely to have been designed by John Nash, famous for designing many buildings of the Regency era. The cottage was part of the estate of Lord and Lady Cahir and was used for entertaining guests. After a long period of neglect the cottage was restored in the late 1980's and was opened to the public in 1989. The Swiss Cottage is managed by the OPW.

- **Charleville Castle** lies on lands that were once part of Ireland's ancient oak woods and part of the 6th Century Lynally monastic site. The current castle was designed by Francis Johnston the architect of Dublin's GPO. It was built between 1800 to 1809 on the site of an earlier mansion (c.1641), itself built on the site of a ruined castle. Uninhabited from 1912, and without a roof from the 1960's, restoration started in the early 1970's. Today the castle is said to be one of the most haunted places in Ireland. It is managed by the Charleville Castle Heritage Trust and operated by a network of volunteers. The Castlepalooza Festival takes place within the castle grounds.
- **Cappoquin House & Gardens** is an 18th Century Georgian mansion built on the site of an old Fitzgerald Castle. It dominates the River Blackwater at the point where the river turns south, historically blocked by ice sheets, and ploughs its way through the hills to the sea. The five-acre south-facing garden, a combination of formal and informal planting, offers fine views over the Blackwater Valley. The castle was one of a series controlling the tidal waters of the river, a main artery of trade with England. The house is privately owned by the Keane family who have lived at Cappoquin for the last 300 years. They are an Old Irish family descended from the O'Cahan clan of Ulster, feudal tenants of the O'Neils. The house is open to the public during May and June and gardens are open all year round.
- **Tourin House and Gardens** located three miles from Cappoquin were built in 1840 in the Italianate style. The main feature is a fine double oak staircase. There are five acres of gardens including a walled garden and the original 16th Century tower house can be seen from the garden. The house is open to the public between May and September.

- **Mobarnane House** is an 18th Century Georgian country house which is now operated as an elegant 3 bedroom guesthouse. Located in the Golden Vale around 10km from the Rock of Cashel, parts of the house date to the 17th Century when it was originally a tower house. The house includes 50 acres of parkland with woods and an ornamental lake.
- **Mount Melleray Abbey** is a Cistercian Monastery on the slopes of the Knockmealdowns just to the north of Cappoquin off the R669. The monastery was founded in 1832 and, while a working monastery, hosts an exhibition centre with a series of interpretative panels outlining the history of Mount Melleray. Also on display in the exhibition centre are a number of Ogham stones brought to Mount Melleray in 1910 by Canon P Power, onetime professor of archaeology in University College Cork. Ogham stones were memorials erected to record the passing of some noted person in ancient Ireland. Also on site are The Cloisters Tea Rooms, a book shop and, continuing the monastic tradition of hospitality, a guesthouse for those seeking an atmosphere of peace and tranquillity.



3.7 Cultural Heritage

Cultural heritage assets include heritage and visitor centres, museums & visitor centres, theatres & cinemas, art galleries, artisan craft and food, traditional sports, music & dancing and festivals & events.

3.7.1 Heritage Centres

Heritage Centres are located in **Cashel**, **Carrick-on-Suir**, **Mallow** and **Lismore**, with the Lismore Heritage Centre offering guided day tours and with an on-site shop.

- **Cashel Heritage Centre** is located on the Main Street and hosts a large scale model of the town in the 1640's as well as audio-visual displays in several languages. The Heritage Centre also has a craft shop, stocking local crafts, including Rossa Pottery.
- **Brú Ború Heritage Centre** located at the foot of the Rock of Cashel, is an affiliate of Comhaltas Ceoltóirí Éireann, the Irish cultural movement which has over 400 branches worldwide. Brú Ború promotes its cultural programme through education, research, publications, exhibitions, performances and information service. The state-of-the-art theatre seats 250 people and hosts some of the best shows in traditional Irish entertainment throughout the year. The venue is home to the resident Brú Ború performance group and there is a restaurant and craft shop on site.
- **Lismore Heritage Centre** offers visitors a journey through the town and area's history. The town's Celtic origins are on view in the historical display room while the story of Lismore, dating from 636 AD, is told in an award winning multi-lingual, audio-visual presentation narrated by Niall Toibin. Visitors can hear about monastic Lismore, Vikings, Normans, Sir Walter Raleigh and Lismore Castle. There is also an exhibition space dedicated to the life and works of Robert Boyle 'The Father of Modern Chemistry' and author of 'Boyles Law'.

- **Carrick-on-Suir Heritage Centre** is located off the Main Street in a former Protestant church. It hosts a collection of local historical photographs, artefacts and the Butler Plate collection. There is a Discover Ireland Information Point on site and a genealogy research service.

3.7.2 Museums & Visitor Centres

These include the Copper Coast Geopark Visitor Centre at **Bunmahon**; the Museum of Transport and the South Tipperary County Museum at **Clonmel**; the **Dungarvan** County Waterford Museum; **Cashel** Folk Museum; the **Kilmallock** Museum (temporarily closed at the moment); and Bridewell Jail in **Tipperary Town**; the **Fethard** Folk Farm and Transport Museum and the Brú Ború Heritage Centre at **Cashel**.

- **Copper Coast Geopark Visitor Centre** contains an exhibition about the local mining industry, the geology and the stories of people who have passed through the Copper Coast over many years. Bunmahon, where the visitor centre is based, was a copper mining centre in the 19th Century. The Copper Coast Geopark is an outdoor museum with a geological story to tell. There is a Copper Coast walking trail and guided tours for schools. There is also a cafe at the visitor centre which provides information on the Copper Coast beaches, villages, walks, angling, surfing, angling, sea-paddling and diving. The Copper Coast is a stretch of the southern coast of Ireland in County Waterford. It is named after the historic metal-mining industry, the legacies of which now constitute a tourist attraction. This geologically diverse area contains records of Palaeozoic volcanism and the last ice age. The area was declared a European Geopark in 2001 and a UNESCO-supported Global Geopark in 2004. They all use and promote their geology and facets of other heritage (archaeology, culture, fauna & flora) as tools for ecological tourism in their own area.

- **South Tipperary County Museum** in Clonmel features artefacts from military, religious, social history, political, natural history, archaeology, geology, social & townscape photography, sports & industrial collections as well as exhibitions on the history of the county.
- **Museum of Transport** in Clonmel is housed in an old mill and is a privately-owned collection of motor history including cars such as Jaguar, Renault, Morris, Mercedes, an MG and a 1904 Clement Talbot. There are also other motoring automobilia such as signs, light garage equipment, books and posters on display. The museum currently occupies two floors of the restored mill.
- **Waterford County Museum** based in Dungarvan in the old Town Hall building is run by the Waterford County Museum Society. Its aims are to present the history of Dungarvan and west Waterford area through a series of well-illustrated panels and displays; to acquire and preserve individual items or collections of local interest; and to encourage public interest in local history.
- **Cashel Folk Museum** is a good example of a privately-run museum. It is located 250m from the Rock of Cashel and includes historical artefacts and exhibitions including the Easter Rising, War of Independence, Civil War, the Famine, The Old Forge, 6,000 year old Bog Butter, antlers of the Giant Irish Elk Antlers (which became extinct 11,000 years ago), the 4,000 year old Menhir/Standing Stone, and the original Statue of Sean Russell.
- **Bridewell Jail** consists of three buildings: a governor's or keeper's house in the centre with two cell blocks at either side. One of the cell blocks now houses the Family History Research Centre, while the second cell block is in the process of being restored to its former state.

- **Fethard Folk Farm and Transport Museum** is an eclectic, privately-run collection of over twelve hundred exhibits including hearses and horse-drawn carriages, a large selection of old bicycles such as penny farthings, boneshakers and ladies' three wheelers, Victorian perambulators, cameras, laundry equipment and everyday household items used over a century ago. The grounds include a cafe, picnic facilities, toilets, a well-equipped playground and free parking. Every Sunday throughout the year there is a collectors' market and car boot sale, where visitors can find all goods ranging from cutlery to anchors.

Museums and visitor centres within the secondary study area include the De Valera Museum at Bruff, Co. Limerick, and several in Waterford City such as the Bishop's Palace, Medieval Museum and Waterford Crystal Visitor Centre.

3.7.3 Theatres and Cinemas

Theatres include the Friar's Gate Theatre and Arts Centre in **Kilmallock**; the **Fetherd** Abbeymill Theatre; and the **Tipperary** Excel Centre & Simon Ryan Theatre.

Cinemas include the SGE **Dungarvan** Cinema and the **Tipperary** Excel Centre.

Theatres and cinemas within the secondary study area include the Theatre Royal in Waterford.

3.7.4 Art Galleries

Art and craft galleries are located at:

- **Castletownroche:** Blackwater Castle exhibition and gallery
- **Kilworth:** The Village Arts Centre
- **Clonmel:** The Narrow Space Art Gallery
- **Dungarvan:** The Beach House Gallery

3.7.5 Artisan Food & Drink

Towns with artisan food producers located in them, or nearby, include:

- **Cahir:** The Apple Farm which also offers camping facilities
- **Clonmel:** James Whelan Butchers
- **Dungarvan:** Nude Food, and the Eight Degrees Brewing Company
- **Kilmallock:** Ballyhoura Apple Farm at Darnstown and Effin Creamery Handcrafted Irish Cheddar
- **Mitchelstown:** Clotilde's Compote at Ballindangan, Hodgins Craft Butchers and Horgan's Speciality Meats

Food markets located at:

- Cahir Farmers Market
- Carrick-on-Suir Farmers Market
- Clonmel Food Market
- Dungarvan Farmers Market
- Fermoy Country Market
- Kilmacthomas Farmers Market
- Kilmallock Farmers Market
- Mallow Country Market
- Mallow Farmers Market
- Mitchelstown Market
- Stradbally Community Market
- Tipperary Town Farmers Market

Within the secondary study area:

- Dunhill Farmers Market
- Killavullen Farmers Market

A cookery school is located at The Tannery Restaurant in Dungarvan.

3.7.6 Artisan Craft Producers

Towns with artisan craft producers or outlets located in them, or nearby, include:

- **Cahir:** South East Regional Craft Granary, Bridget Breedy Handcrafted Soap
- **Cashel:** Windmill House, Rossa Pottery & Gift Shop
- **Clonmel:** The Narrow Space Craft Gallery
- **Dungarvan:** Ben O'Neill Music Shop, Reflections Crystal/ Slateways, Comeragh Crystal, The Beach House Gallery,
- **Kilworth:** Gallery Crafts
- **Carrick-on-Suir:**
- **Mallow:** Truly Gifted Handmade Irish Craft & Gallery
- **Charleville:** Glen Bridge Forge
- **Glen of Aherlow:** Mandy Parslow Potter

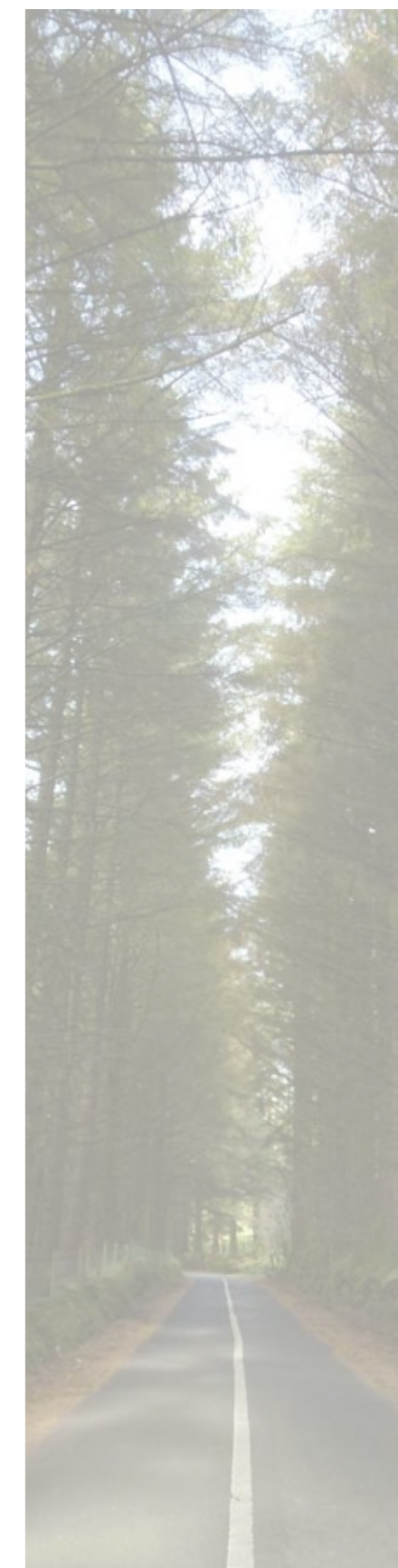
Within the secondary study area

- **Tallow:** Felix Faulkner Jewellery Studio, Glencairn Pottery
- **Waterford:** The Art Hand Art School

3.7.7 Traditional Sports

For those interested in traditional sports, road bowling takes place on the Castletownroche Road near **Doneraile** on Friday evenings between April and September.

Within the secondary study area Copper Coast Road Bowling tutors people in road-bowling in Fenor.





3.7.8 Traditional Music & Dancing

Traditional music venues are located at:

- **Ardpatrick:** Irish Set and Ceili Dancing Classes, Greenwood Inn
- **Glen of Aherlow:** Tig Roy
- **Kilmallock:** Deebert House Hotel Irish Nights
- **Kilfinane:** Cushvreena Lodge Rambling House, Ballinvreena Crossroads dancing
- **Mallow:** Ballyclough Rambling House

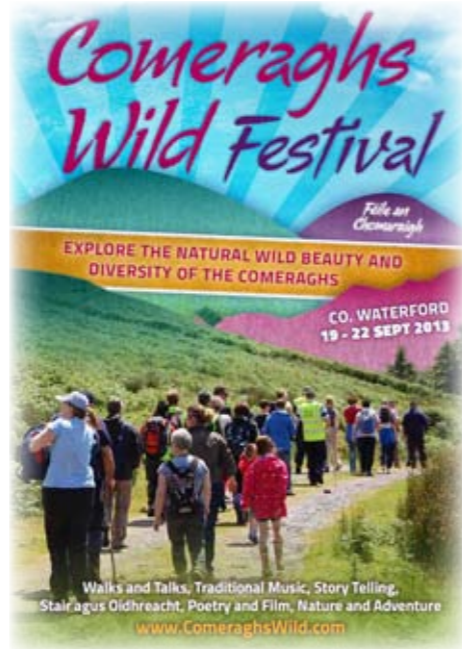
In addition many bars offer traditional music nights within the study area.

3.7.9 Christian & Spiritual Centres

For those seeking an alternative approach to life Christian and spiritual centres are located at:

- **Tipperary:** The Sanctuary Health & Holistic Centre

The secondary study area includes the Nano Nagle Centre near Killavullen.



3.7.10 Literature

- Trevor Bowen Summer School, Mitchelstown

3.7.11 Language Schools

Language schools are located at:

- **Mallow:** Eden Hill Language and Equestrian Centre, Sunfort English Language Centre
- **Dungarvan:** Colaiste Na Rinne
- **Tipperary:** Cullen Summer School

3.7.12 Festivals and Events

There are many festivals taking place each year within the study area. These can be grouped into several categories.

Music, Drama, Dance & Literary

- **Charleville:** North Cork Drama Festival, Castlepalooza
- **Ballyduff:** Waterford Fleadh Cheoil
- **Cahir:** Culture Night at the Craft Granary
- **Carrick-on-Suir:** Carrick Music Theatre Festival
- **Clonmel:** South Tipperary Culture Night
- **Dungarvan:** Storytelling Southeast
- **Glenroe:** Harvest Festival
- **Kilfinane:** Rocky Mayhem
- **Kilmallock:** Festival of Once Act Drama
- **Lismore:** Choir Christmas Concert
- **Mitchelstown:** Independence Music & Arts Festival
- **Tipperary Town:** Tipperary Dance Platform

Festivals within the secondary study area include:

- **Bruff:** The Tommy Brouder Festival
- **Bruff:** Bluegrass Music Festival
- Bloomsday in **Bruff**
- **Bruff:** Lough Gur Storytelling Festival
- **Kanturk:** Arts Festival
- **Cashel:** Arts Fest

Traditional Culture

- **Clonmel:** Junction Festival
- Comeragh Wild Festival
- **Fermoy:** St Patrick's Day Parade
- **Galbally:** Garden Fete
- **Kilbehenny:** Potato Festival
- **Mallow:** St Patrick's Day Parade
- **Mitchelstown:** St Patrick's Day Parade

Festivals within the secondary study area include:

- **Bruff:** Lough Gur Summer Solstice Festival
- **Bruff:** Summer Festival
- **Croom:** Manister Spring Fair
- **Kilmeaden:** First Village Vintage Festival

Adventure Activity

- **Kilmacthomas/Lemybrien:** Walk Waterford Autumn Season
- **Ballyhoura:** Headless Horseman Adventure Race (endurance event), Ballyhoura International Walking Festival, Ballyhoura Autumn Rambling Festival, Limerick Biking Blitz Mountain Bike Event (16-17/02/13), Ballyhoura Mountain Bike Trail Day at the Greenwood Loop (18/03/13), Ballyhoura Country Walk of the Blackrock Loop (21/03/13), Walking Tour of the Griston Bog Outdoor Classroom (23/03/13), Munster XC Mountain Biking Series; Gravity Enduro Mountain Bike Event

- Kilmallock: Kilmallock Cycling Hub Annual Hub Tour
- Ballymacarbry: Nire Valley Drop, Comeragh Mountains Autumn Walking Festival
- Dungarvan: Walk Waterford Autumn Season
- Glen of Aherlow Winter Walking Festival (02-03/02/13)
- Ballyhoura: Lismore: Walk Waterford Autumn Series – Ballysaggart Towers
- Comeragh Wild Festival
- Anglesboro: Anglesboro Mid Summer Walking Festival
- Galtee Crossing/Challenge

Festivals within the secondary study area include:

- **Doon:** The Paddy Dakar

Horse-racing

- **Clonmel:** Racing at Clonmel (all year except January, July & August)
- **Mallow:** Racing Home for Easter

Festivals within the secondary study area include:

- **Tipperary Town:** Racing at Tipperary (April-August, October) and Super Sunday

Food, Craft and Art

- **Cahir:** Michael Collins Great Island Photography Collection
- **Cahir:** Applefest Slow Food Apple and Cider Festival
- **Clonmel:** Face to Place Exhibition
- **Dungarvan:** Waterford Festival of Food
- **Mallow:** Annual Mushroom Hunt
- **Mallow:** Longueville House Harvest & Cider making Tour
- **Mitchelstown:** Mitchelstown Food Festival & Awards

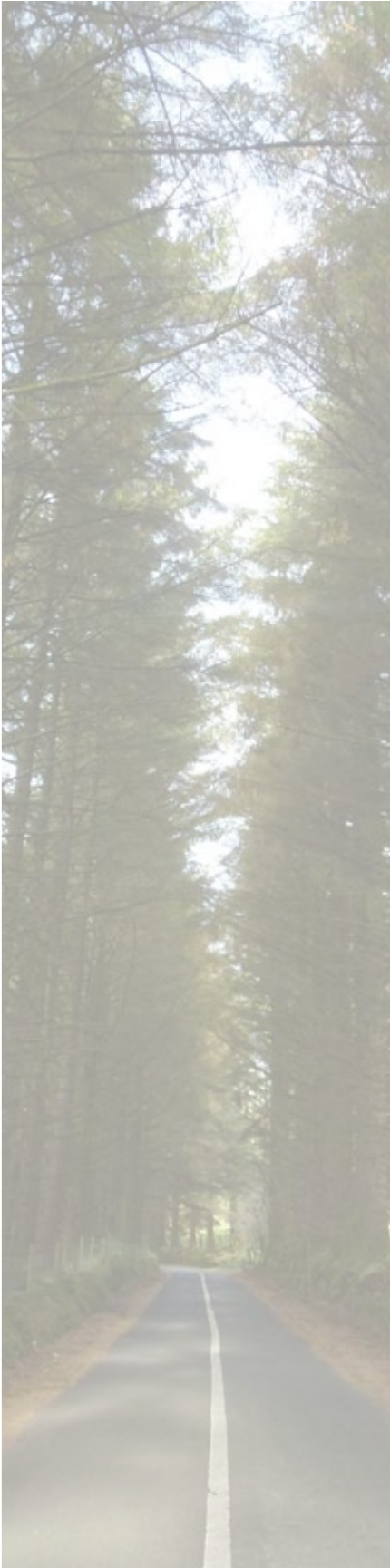
Historic

- **Charleville:** Archbishop Mannix Memorial Weekend
- **Charleville:** Charleville Agricultural Show
- **Fetherd:** Fetherd Medieval Walled Town Festival
- **Kilmallock** Walled Towns Day
- **Lismore:** Robert Boyle Science Week

Children's Festival

Within the secondary study area children's festival's include:

- **Croom** Christmas Festival
- **Kilmeaden:** Spooky Express at the Waterford & Suir Valley Railway, Santa Express at the Waterford & Suir Valley Railway, Teddy Bears Picnic at Waterford & Suir Valley Railway





3.7.13 Driving Tours

The study are offers a wide range of driving trails. These are shown on Table 18, below.

Given the area covered by the study area and the variety of terrain and scenery, a driving tour which joins the surrounding settlements and that is linked by a common theme or themes is an opportunity.

Table 18: Driving Routes Within and Near the Study Area

Driving Route	Length (km)	Route
South East Coastal Drive	210	Wexford-Kilmore Quay-Wellingtonbridge-Fethard-Hook Head-Ballyhack-PassageEast-Dunmore East-Tramore-Annestown-Bunmahon-Stradbally-Dungarvan-Ardmore. Recommended as two drives – Tramore-Ardmore and Tramore to Wexford.
Mountain and Wave Route	196	Clonmel-Carrick-on-Suir-Waterford City-Dunmore East-Tramore-Dungarvan-Cappoquin-Lismore-The Vee-Clonmel
The Copper Coast and Comeragh Mountains	156	Waterford City-Tramore-Dungarvan-Comeragh Mountains Loop-Lemybrien-Kilmacthomas-Waterford City
The Vee Drive	178	Waterford City-Kilmacthomas-Lemybrien-Dungarvan-Cappoquin-Lismore-Clogheen-Cahir-Clonmel-Carrick-on-Suir-Waterford City
Ballyhoura Heritage Trail - Sli Finn	30	Kilfinane-Ardpatrick-Glenosheen-Ballyorgan-Ballylanders.
Ballyhoura Heritage Trail - Golden Vale Drive	112	Limerick-Pallas Green-Emly-Galbally-Ballylanders-Kilfinane-Kilmallock-Bruree-Athlacca-Bruff-Holycross-Lough Gur
Ballyhoura Heritage Trail - Ballyhoura Drive	123	Labbamologga-Ballinvreena-Mitchelstown-Kilbehenny-Anglesboro-Kildorrery-Shanballymore-Castletownroche-Doneraile-Churchtown-Liscarroll-Dromina-Milford-Charleville-Kilmallock-Kilfinane.
Kilkenny Tipperary Heritage Route	155	Kilkenny-Balingarry-Killenaule-Fethard-Cashel-Cahir-Clonmel-Carrick-on-Suir-Windgap-Callan-Kilkenny
Tipperary Towns Route	132	Clonmel-Cahir-Bansha-Tipperary Town-Golden-Cashel-Fethard-Clonmel
Blackwater Heritage Trail	TBC	Blarney-Mourneabbey-Mallow-Buttevant-Killavullen-Balyhooley-Castlelyons-Conna-Lismore-Cappoquin-Ballysaggatsmore-Ballyduff-Kilworth-Glanworth-Fermoy-Castletownroche



3.8 Natural Heritage

Natural Heritage Attractions include forest parks, beaches, natural attractions such as waterfalls and caves, views, notable gardens and visitor farms.

3.8.1 Designated Sites

The study area contains many designated areas which illustrate the considerable valuable natural heritage in the area. These include:

- **National Heritage Areas (NHA's):** The basic designation for wildlife is the Natural Heritage Area (NHA). This is an area considered important for the habitats present, or which holds species of plants and animals whose habitat needs protection – 75 raised bogs and 73 blanket bogs have been given this legal protection in Ireland.

NHA within the study area: Slievenamon Bog (002388)
- **Proposed National Heritage Areas (pNHA):** These were published on a non-statutory basis in 1995, but have not since been statutorily proposed or designated. These sites are of significance for wildlife and habitats. Some of the pNHAs are tiny, such as a roosting place for rare bats. Others are large such as a woodland or a lake, for example. There are 630 pNHA's in Ireland.

There are 44 pNHA's within the study area - See list in Appendix A4: Product Audit Detail.

- **Special Areas of Conservation (SAC):** These are prime wildlife conservation areas in the country, considered to be important on both European and Irish levels. Their selection and designation occurs through the EU Habitats Directive (92/43/EEC), which was transposed into Irish law in the European Union (Natural Habitats) Regulations, 1997 and amended in 1998 and 2005. The Directive lists certain habitats and species that must be protected within SACs. Irish habitats include raised bogs, blanket bogs, turloughs, sand dunes, machair (flat sandy plains on the north and west coasts), heaths, lakes, rivers, woodlands, estuaries and sea inlets. The 25 Irish species which must be afforded protection include Salmon, Otter, Freshwater Pearl Mussel, Bottlenose Dolphin and Killarney Fern.

There are 9 SAC's within the study area:

- Lower River Suir (002137)
- Comeragh Mountains (001952)
- Nire Valley Woodlands (000668)
- Blackwater River (002170)
- Glendine Wood (002324)
- Moanour Mountain (002257)
- Galtee Mountains (000646)
- Ballyhoura Mountains (002036)
- Carrigeenamronety Hill (002037)

- **Special Protected Areas (SPA)** Ireland is required under the terms of the EU Birds Directive (2009/147/EC) to designate Special Protection Areas (SPAs) for the protection of endangered species of wild birds. Ireland's SPA Network encompasses over 570,000 hectares of marine and terrestrial habitats

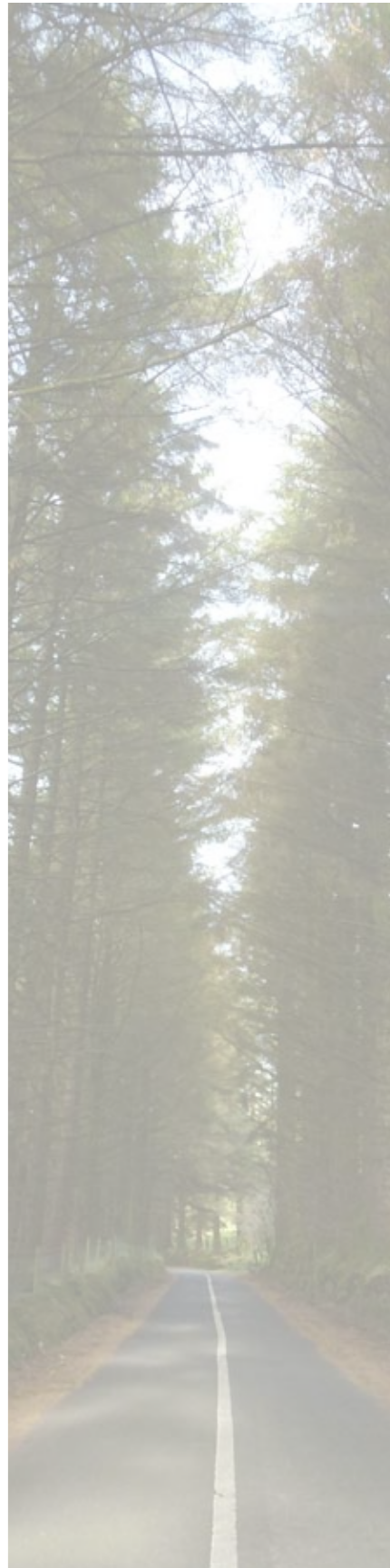
There are 4 SPA's within the study area:

- Kilcolman Bog
- Blackwater Callows
- Mid-Waterford Coast
- Dungarvan Harbour

3.8.2 Forest Parks

There are thirteen Forest Recreation Sites listed on the www.coillteoutdoors.ie website within the study area. These are shown on *Map 5: Study Area Walking Routes and Hubs* and include:

- **Glenshelane** – Gleann Siothláin – “The Glen of the Fairies”, lies adjacent to the picturesque town of Cappoquin near the River Blackwater. This forest includes camping, gardens, picnic site, viewing points and walking trails with three of these laid out in 1999 in a community project involving Coillte and Cappoquin Development Ltd.
- **Colligan Wood**, 8km north of Dungarvan on road to Clonmel. The wood lies in a beautiful scenic valley through which the River Colligan flows and enters sea at Dungarvan Bay. There are steep wooded glens on each side of the river. The area still carries some remnants of the old woodland oaks. There are a variety of forest walks along the riverside and through the mixed woodland of conifers and broadleaves; easy short walks can be enjoyed on either side of the picnic area whereas longer and more strenuous walks can be had by taking in the loop walk from the picnic site. Many trees around the picnic site and along the walks have been labelled for easy identification. There are a number of lovely viewing points of the surrounding area from the loop walk.
- **Kilclooney**, 15km south of Carrick-on-Suir Kilclooney Wood is situated on the lower slopes of the Comeragh Mountains. Coumshingaun Lake, Crotty's Lake and Crotty's Rock are popular local features that are located nearby. Indeed, Coumshingaun Lake is one of the best examples of a corrie lake in Ireland. Facilities include a number of picnic tables which can be found close to the car park.





- **Carey's Castle**, 4km from Clonmel off the Dungarvan Road, within a mixed woodland forest, lies the ruins of the castle from which the forest derives its name. This was built in the 1800's by the Carey family from Clonmel. Part of the East Munster Way passes through the forest which includes picnic sites and walking trails.
- **Caher Park Forest**, on land originally owned by the Butlers of Ormonde in the 18th Century and then by the Charteris Estate, now forms a popular place for visitors to the south of Cahir town. The River Suir, popular for salmon fishing, flows south-eastwards through the forest and Swiss Cottage is 2km downstream from Cahir. All stands of trees are native broadleaf, much of it oak and beech planted around 1790-1800. There are walks through the forest and picnic tables & toilets next to the car-park.
- **Bansha Woods**, 6m from Tipperary Town on the main N24 Road to Cahir. Situated on the lower slopes of Slievenamuck, the woods include picnic sites and walking trails. Walkers can visit Moore's Rock, a promontory that offers fine views of the Galtee Mountains and the rich farmland that lies at the base of the Glen of Aherlow. For the more energetic walker, it is possible to walk to the Millennium Monument at the top of Cordangan or follow the forest roads along the Slievenamuck ridge to Christ the King Statue.



- **Gortavoher Forest** on the hill of Slievenamuck in the Glen of Aherlow, approximately 6.5km from Tipperary town. Aherlow is derived from the Irish Eartharlach that translates to 'low land between two high lands'. Slievenamuck – Sliabh Muice – Mountain of the Pigs, is believed to derive its name from the herds of wild pigs that once roamed the valley. Legend has it that it was on this hillside that Fionn mac Cumhaill slew the dangerous sow - Beo, who was causing havoc in Munster at that time. Also notable, is Charles Bianconi's horse-drawn carriage services that passed through the forest in the 1800's via the local Coach Road stopping point. Bianconi was an Italian who played a major role in the development of coach services distributing both mail and passengers throughout Ireland. A section of one of these routes has been restored within the forest. This scenic destination offers the visitor a wide variety of options. There are a multitude of forest walks to choose from, a nature park to explore, and a number of viewing areas of the Galtees and surrounding countryside. Car parks are provided.
- **Glengarra Wood**, 15km southwest of Cahir on the old Dublin/Cork road, now the R639. The 570ha forest is on the southern slopes of the Galtee Mountains and although mainly consisting of Sitka spruce coniferous forest it also includes 50ha of native oak, birch, and alder. Glengarra property was formerly part of the Shanbally Estate, between Burncourt and Clogheen, which was owned by Viscount Lismore. During the 19th century he built a lodge (which is now An Óige youth hostel) about 3 kms up from the main road. There are two waymarked trails on this site. A 2km loop walk star and the Millennium Walk which is about 7 kms long. There is a small car park about 1 km up the road to the An Óige Hostel. The forest stretches from about 120 metres to about 300 metres above sea level and there are a number of viewing points looking south to the lowlands and the Knockmealdown Mountains.

- **Galtee Castle** located on the southern slopes of the Galtee Mountains close to Mitchelstown and Kilbeheny off the old N8 (R639). The area was once the site of Galtee Castle built in 1740 which, with later additions, became the home of the Kingston family. The last owners were the Buckleys of Galtee Castle Estate. The Castle was demolished around 1940 and the stone was then used to build the local church in Glanworth. All that remains as evidence of the estate are some red sandstone stables and an outline of the tennis courts. The woodland consists of a diverse species block of approximately 450 hectares. Broadleaves include; oak, ash, beech, sycamore, birch, chestnut, rowan, whitebeam and holly. Conifers include; Sitka spruce, Norway spruce, Scot's pine, Western hemlock and grand fir. For walkers, the Attychraan National Looped Walk starts and finishes at the car park. This is a scenic trail with fine views of the mountains, farmlands and rolling countryside, as well as opportunities to walk through some impressive stands of trees.
- **Ballinaboola Forest**, 4km from Ballyhay on the N20 in North Cork and 9km from Charleville, is part of a 6,000 hectare block that is criss-crossed with multiple tracks and forest roads. There are two National Looped Walks starting/finishing from this car park.
- **Ballyhoura Forest** walking trails are accessed from a trailhead near Ardpatrick. Walking trails provide visitors with vistas of the surrounding farmland, old historic estates such as Castleoliver with its prominent house and folly, and unique views of towns such as Charleville and Kilmallock. Views of the neighbouring mountain range of the Galtees and down into the Glen of Aherlow are common, whilst on a good day, the Knockmealdowns may be visible from the higher points. The car park at Greenwood is the main trailhead for the mountain-biking trails but there are a number of walking trails that also begin and finish here. Due to the popularity of this site there are extensive visitor facilities including picnic site, toilets, viewing points, refreshments and car park.

- **Glenanair** is in the heart of the Ballyhoura uplands. It is right on the border between counties Cork and Limerick. This area is famous for its walks as there is varying topography of rolling farmland, forestry and mountain tops to choose from. Visitor facilities include picnic sites, viewing points and walking trails.
- **Glansheskin-Kilworth** located on the outskirts of Kilworth village. A main feature of the forest is the Douglas River, which links up with the Araglin River close by and the two tributaries feed into the Blackwater. This section of river is known for its populations of otter, salmon, brown trout, brook and river lamprey. Red squirrels, badgers, foxes, rabbits, many species of bat, dippers, blackbirds, wrens, cuckoo, coal tits and many more species of wildlife frequent the forest. The diversity of tree species, along with the shrub and ground flora layers, means this amenity site is favoured by nature lovers. There is a picnic area located alongside the car park and close to the river. Walks in the area run either side of the Douglas River and are bridged at a number of points offering the visitor the opportunity to loop back to the car park. The Blackwater Way also makes its way through the forest.

3.8.3 Beaches

To the south east are two Blue Flag beaches at **Annestown** and **Bunmahon**.

3.8.4 Natural Attractions

Aside from the four mountain ranges there are many natural attractions within the study area. These include **Mitchelstown** Caves, the spectacular Mahon Falls near **Kilmacthomas**, Galtee Vee Valley, the Blackwater River and the Comeragh Magic Road near Mahon Falls.

Fenor Bog lies just outside the study area boundary.

3.8.5 Views

There are several notable locations for views including Mahon Falls, Nire Valley, The Vee, Knockmealdowns and Ballyhoura Woods car park. These are shown on *Map 5: Study Area Walking Routes and Hubs*.

3.8.6 Gardens

There are several notable gardens within the study area including those at:

- **Cahir:** Ballyboy House Garden & Woodland, New Haven Garden
- **Cappoquin:** Dromana House & Gardens, Cappoquin House & Gardens, Salterbridge House & Gardens, Tourin House & Gardens
- **Cashel:** Camas Park Garden
- **Clonmel:** Ballyhist Garden, Killmacomma Garden, Killurney Garden
- **Kilmallock:** Terra Nova Gardens
- **Lismore:** Ballyin Garden, Lismore Castle Gardens

Close to the study area there are also gardens at Kilmeaden.

3.8.7 Visitor Farms

There are visitor farms at **Mallow** and **Clogheen** where Parson's Green offers visitors a park, pet farm, farm museum, picnic facilities, crazy golf, garden & river walks and a playground with cable swing.

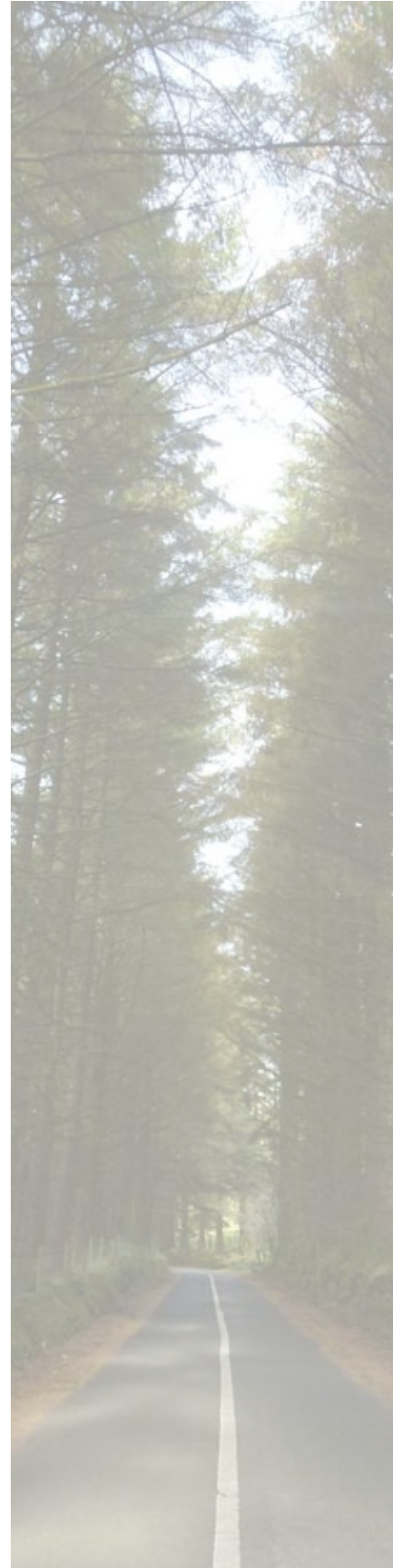
Just outside the study area there is also a visitor farm at Fenor.

3.9 Visitor Facilities

3.9.1 Accommodation

The Tourism Product Audit identified a range of accommodation within the study area including:

- **31 hotels:** The main centres for hotels are **Clonmel** (7), **Cashel** and **Dungarvan** (4 each) and **Mallow** (3). Other towns with hotels include Cahir (2), Mitchelstown (2), Carrick-on-Suir (1), Cappoquin (1), Charleville (1), Fermoy (1), Glen of Aherlow (2), Kilmallock (1), Lismore (2) and Tipperary Town (1). A 5* hotel is Raheen Country House Hotel near Clonmel.
- **83 B&B's, guesthouses, townhouses and country houses:** The main centres are **Cashel** (19), **Mallow** (11), **Dungarvan** (9), **Clonmel** (8) and **Cahir, Kilmallock, Mitchelstown** and **Tipperary Town** (5 each). Other towns with 1 or 2 include Ballyhea, Ballymacarbry, Carrick-on-Suir, Charleville, Bansha, Cappoquin, Doneraile, Glanworth and Tallow.
- **62 self-catering:** The main locations are **Mallow** (11), **Kilfinane** (8), **Cashel** and **Dungarvan** (5 each) and Ardpatrick and Ballyduff Upper (3 each). There are others at Ballyorgan, Bansha, Cahir, Cappoquin, Carrick-on-Suir, Castletownroche, Clonmel, Kilmacthomas, Kilmallock, Mitchelstown and Tipperary Town.
- **7 holiday homes:** There are two at **Glen of Aherlow** and one each at Cahir, Dungarvan, Glenasheen, Kilfinane, Mallow, Clonmel and Rathgormack.
- **12 farmhouses with accommodation:** There are two each near Cashel, Dungarvan and Bansha and one each near Ballymacarbry, Cahir, Clonmel, Kilmallock, Mallow and Mitchelstown.
- **5 historic Houses:** One each at Bansha, Carrick-on-Suir, Castletownroche, Doneraile, Fermoy and Fethard.





- **1 restaurant with accommodation:** The Tannery at Dungarvan.
- **9 camping and caravan parks:** There are two at the Glen of Aherlow (Glen of Aherlow Caravan and Camping Park and Ballinacourty House) and one each at Cahir, Fermoy, Dungarvan, Clogheen and Clonmel.
- **3 hostels:** An Oige and Cashel Lodge
- **1 monastery:** Mount Melleray near Cappoquin
- **3 activity holiday accommodation:** Eden Hill Equestrian Centre in Mallow, Rathgormack Hiking Centre and Hostel, Kilfinane Outdoor Education Centre

Taking all accommodation into account the principal accommodation centres are:

- Cashel with 32 properties
- Clonmel with 29 properties
- Mallow with 27 properties
- Dungarvan with 22 properties
- Cahir with 12 properties
- Mitchelstown with 10 properties
- Tipperary Town with 8 properties
- Kilfinane with 6 properties
- Glen of Aherlow with 6
- Other places with several places to stay include Kilmallock and Bansha (5 each), and Lismore, Fermoy, Carrick-on-Suir, Cappoquin (4 each) and Charleville (3).

3.9.2 Pubs, Bars, Cafes & Restaurants

The majority of towns have a selection of **pubs and bars**. However the key locations appear to be Cashel, Dungarvan and Tipperary Town.

Restaurant hubs include Cashel, Charleville, Dungarvan, Kilmallock and Mitchelstown.

3.9.3 Visitor Information Centres

Visitor Information Centres fall into two categories – official Fáilte Ireland-managed Discover Ireland Centres and smaller Visitor Information Points; and community-run tourist information offices.

Discover Ireland Centres are located at:

- Cahir

Fáilte Ireland Visitor Information Points are located at:

- Lismore
- Carrick-on-Suir
- Cashel Heritage Centre - Visitor Information Point
- Bri Boru Cultural Centre Cashel – Visitor Information Point
- Fermoy

Community offices include:

- Dungarvan Tourist Office
- Glen of Aherlow Community Tourist Office
- Clonmel

Within the secondary study area:

- Waterford Discover Ireland Centre
- Tramore Visitor Information Point
- Mallow Visitor Information Point

3.10 Maps

Map 1: Study Area Context

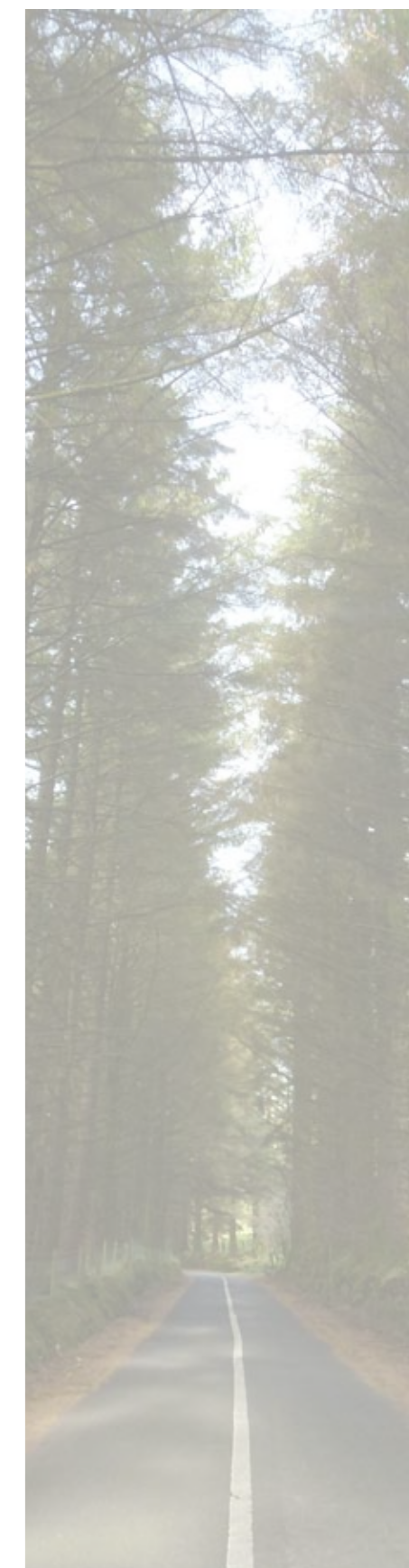
Map 2: Study Area Overview

Map 3: Primary and Secondary Study Area

Map 4: Mountain Areas

Map 5: Study Area Walking Routes and Hubs

Map 1: Study Area Context



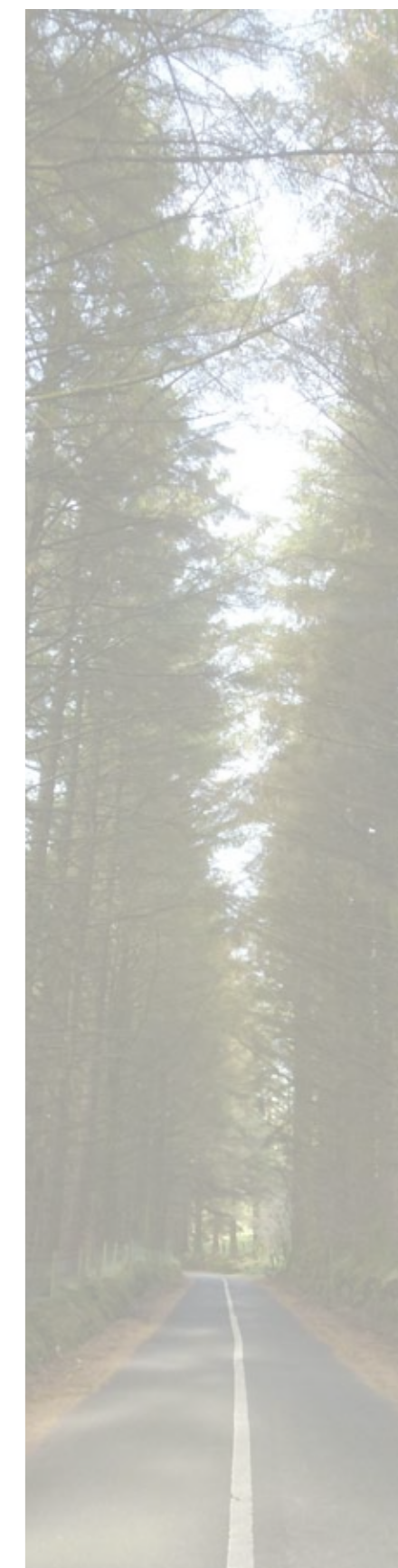
Map 2: Study Area Overview



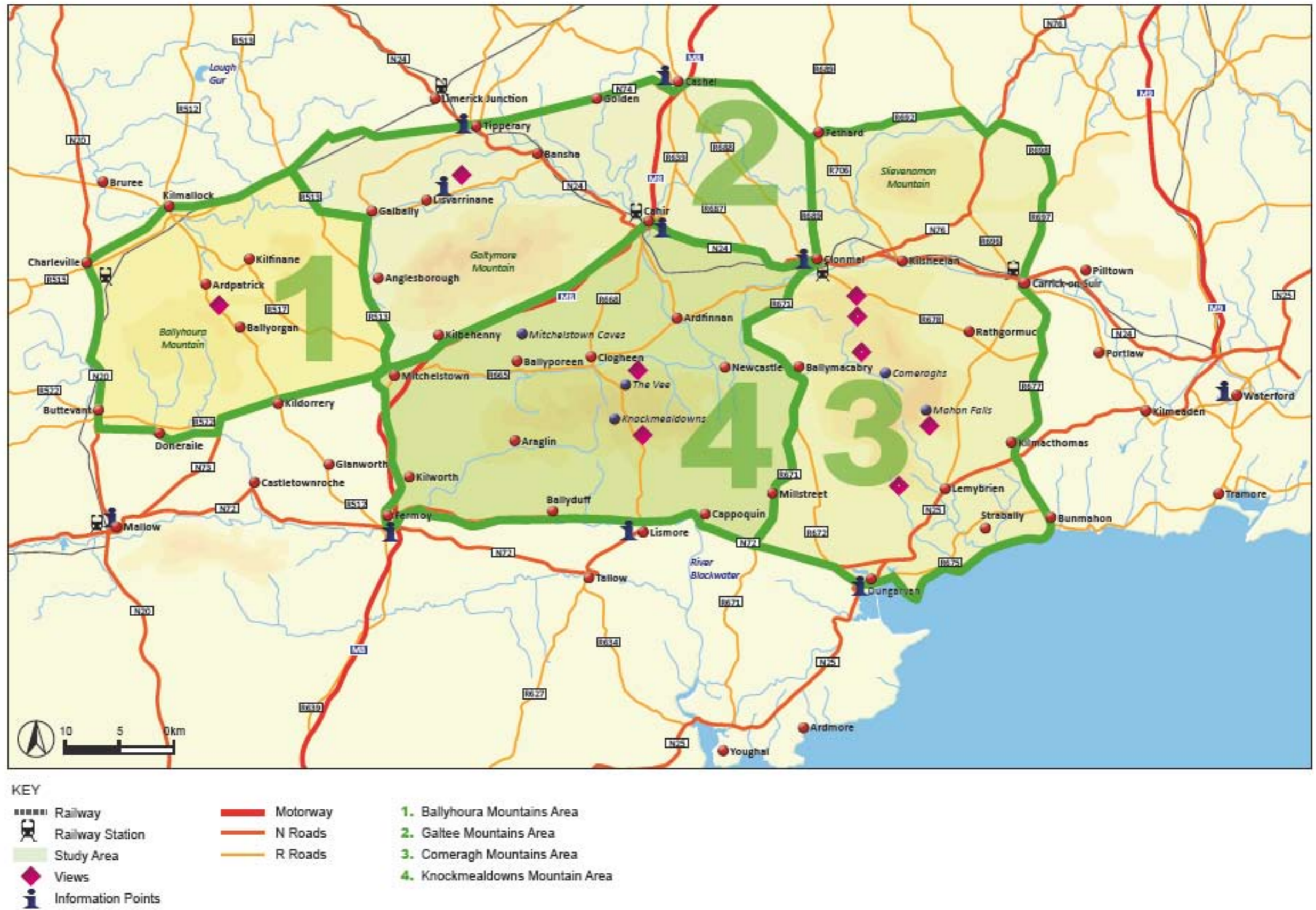
KEY

- | | |
|--------------------|----------|
| Railway | Motorway |
| Railway Station | N Roads |
| Study Area | R Roads |
| Views | |
| Information Points | |

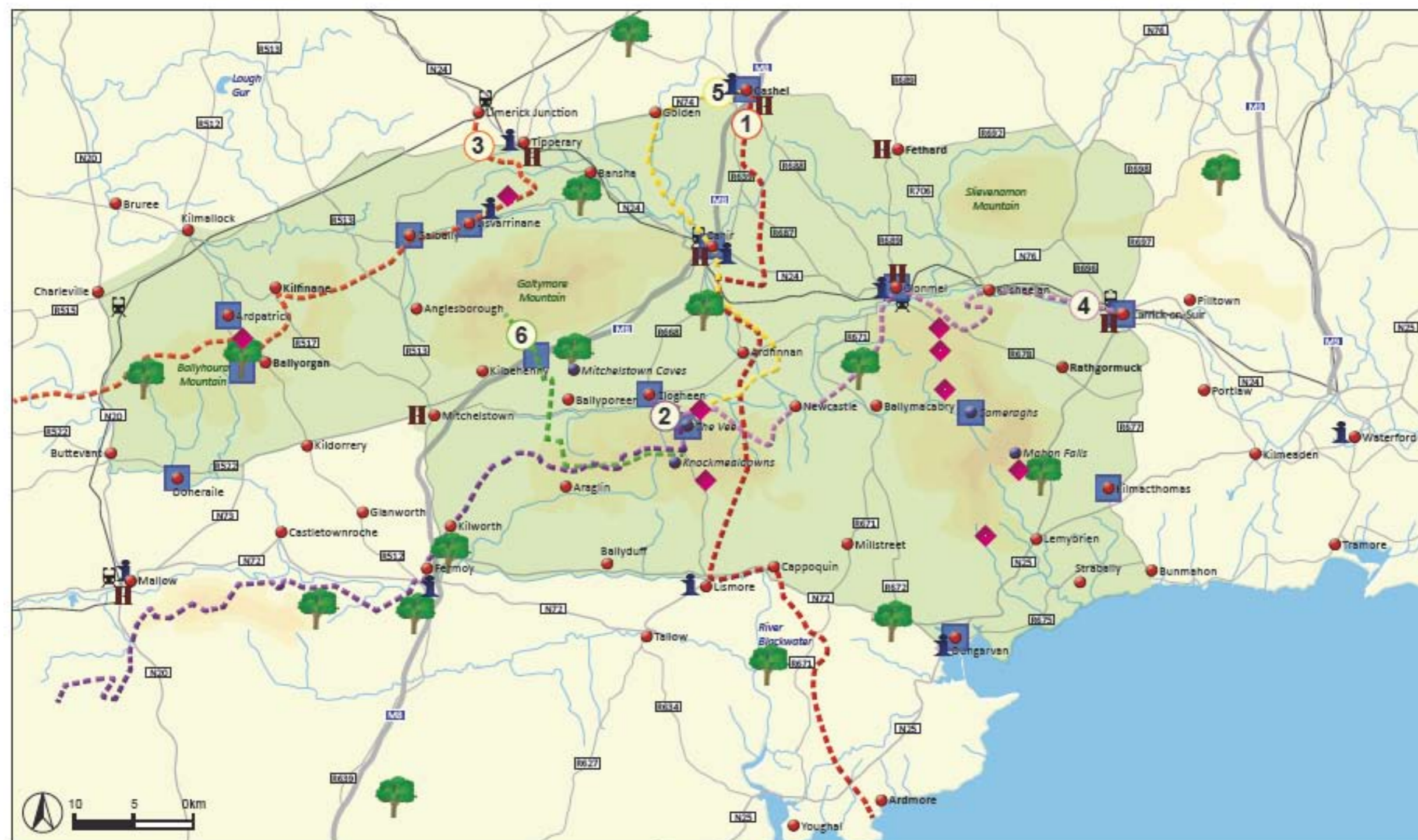
Map 3: Primary and Secondary Study Areas



Map 4: Mountain Areas



Map 5: Study Area Walking Routes and Hubs



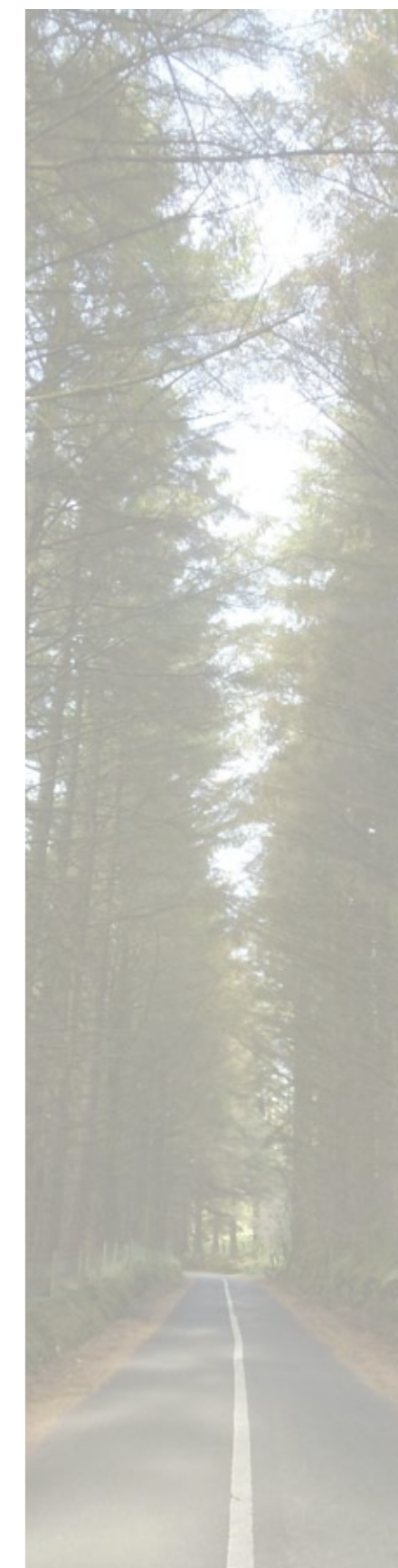
KEY

-  Railway
-  Railway Station
-  Study Area
-  Views
-  Information Points

-  Historic Town Trail
-  Walking Hub
-  Coillte Forest Recreation Sites

WALKS

1. St Declan's Way
2. Avondhu Way
3. The Ballyhoura Way
4. The East Munster Way
5. The Tipperary Heritage Way
6. 4 Counties Route





3.11 SWOT Analysis

TDI research into the study area's strengths, weaknesses, opportunities and threats (SWOT) has been undertaken through a combination of:

- TDI team observations through site visits to all parts of the study area,
- Discussions with tourism and recreation stakeholders in the study area i.e. public authorities, hospitality and attraction operators, and community representatives,
- Discussions with the national agencies responsible for tourism i.e. Fáilte Ireland, Tourism Ireland,
- Study of existing tourism and recreation strategic documents and plans for the four mountain ranges in the study area prepared by planning authorities and interest groups.

The SWOT analysis draws on all these sources. It is presented under each of the four components through a series of themes i.e.

- resources and facilities,
- organisation and support,
- market awareness and demand.



Strengths	Weaknesses
Opportunities	Threats

Resources and Facilities

- **Natural Resources:** natural beauty of the environment, mountains, countryside, forests, rivers and the sea, offering exceptional views inland and to the sea; proximity of Copper Coast Geopark
- **Cultural Heritage:** small towns and villages with extensive history and culture; variety and quality of the built heritage; strong festivals programme; food, craft and traditional activities heritage
- **Recreation Product & Experiences:** wide variety of long distance walks linking the area with surrounding counties, and looped and linear shorter walks suited to novice, family and experienced walkers; excellent variety of soft and hard adventure tourism including hiking, biking, angling, equestrian and orienteering; attractions such as Mitchelstown Caves and Cahir Castle

Organisation and Support

- **Public Authorities:** local authority collaboration
- **Communities:** strong town and village communities and civic pride; strong community groups involved in mountain recreation development, Volunteer networks;
- **Private sector:** strong stakeholder support for single destination concept

- **Performance and Skills:** Centres of Excellence (for Angling at Cahir with River Blackwater also offering angling, for Walking at Glen of Aherlow, and for mountain biking at Ballyhoura); existing skills in the area for destination marketing e.g. Visit Ballyhoura

Market Awareness and Demand

- **Access:** into the study area through transport links with M8 and M9 motorways and network of N roads interconnecting the area and linking it with surrounding towns, and through several Bus Eireann service routes through the area and links Cork, Kilkenny, Dublin, Limerick, Waterford, Wexford and Rosslare; and to the resources in the study area e.g. through forest, river and upland access
- **Market Knowledge:** mountain biking in Ballyhoura; walking in Waterford through the November 2013 Walking Conference in Dungarvan; proximate urban areas e.g. Cork, Limerick, Kilkenny, Waterford

Strengths	Weaknesses
Opportunities	Threats

Resources and Facilities

- **Degradation and Poor Tourism Awareness:** some walking trails are over used and eroded e.g. those near the Vee; dereliction and boarded up shops in villages; high traffic speeds in some areas; anti-social behaviour e.g. car break ins

- **Limited Tourism and Recreation Facilities:** limited 3-4-5 star hotel provision; many B&B's are unregistered; lack of high quality restaurants/pub food; limited children's activities; limited evening entertainment; inadequate recreational parking facilities and picnic stops at access points
- **Attractions and Presentation:** Lack of an iconic visitor attraction – lightening rod/magnet; lack of product/experience bundling; lack of data on tourism at a local level; no single point of contact for all walks information with downloadable maps
- **Development Resources:** scarce financial and human resources
- **Signage:** the Knockmealdowns are currently poorly signed off the M8 Dublin-Cork motorway, the main tourist access route to the southwest. In fact, the first dedicated sign is at the entry to the R668 road out of Cahir (too late for many motorists). Mixed signage from Newcastle to Clogheen, with too many brown signs causing confusion for non-initiated (Munster/Blackwater/ Tipp Heritage/ Suir Drive/ local walks). Also confusion between .Blackwater Way. and .Avondhu Way on OSI Discovery Sh. 74.

Organisation and Support

- **Lack of Designations:** the Knockmealdowns do not enjoy the same environmental protection as e.g. the Galtees have no SAC/ NHA or SPA designations under environmental law, despite the fact that the mountains contain a number of varied habitats (heath, lakes, blanket peat) and are home to many species of birds which are red-listed. (e.g. Red Grouse, Cuckoo).
- **Prioritisation and Collaboration:** study area covers four counties and so is not a priority for any of the local authorities; little history of collaborative marketing amongst accommodation sector; poor history of cross-border collaboration; lack of inter-community knowledge and awareness

- **Identification of the Study Area:** weak sense of a cohesive destination at both local and national levels
- **Community issues:** ageing volunteers; insufficient trickle down of economic benefits of tourism e.g. limited revenue from adventure activities (hiking/ biking) flowing to communities, spin-offs are small at the moment due to day-trippers and short stay visitors
- **Investment:** need for funded drivers of projects due to resource constraints; insufficient business innovation

Market Awareness and Demand

- **Transport** Weak public transport within the study area in particular to mountainous areas of South Tipperary, though daily bus services from Cork through Cloghen-Ardfinnan-Clonmel offer links. Poor access to mountains from towns/ villages apart from car
- **Individual and Cohesive Identify:** no clear identity for the study area; need to manage whole destination approach carefully to avoid customer confusion and dilution of existing brands;
- **Marketing:** lack of international marketing due to lack of identity



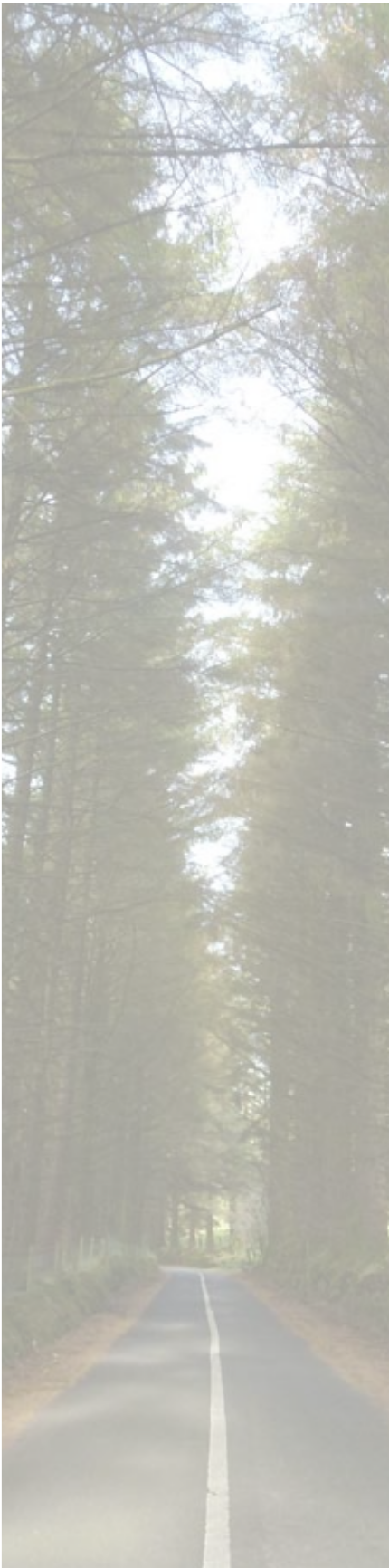
Strengths	Weaknesses
Opportunities	Threats

Resources and Facilities

- **Activity Product and Experience Development:** development of a collaborative recreation destination of excellence; packaging and bundling of attractions and accommodation and transport with range of recreational activities e.g. walking, cycling, angling, equestrian, golf etc; walking festivals; build on success of walking events such as 4 County Challenge and St Declan's Way; development of a walking/cycling trail that links all mountain areas; enhance existing, and develop new, product offering e.g. caving, rock-climbing, white water rafting; provision of access for all
- **Cultural Heritage Product and Experience Development:** presently under-developed medieval architectural heritage; development of education programmes in conjunction with Cahir Castle, Mitchelstown Caves and other heritage attractions; capitalise on educational potential of the geology, built heritage, cultural heritage, caves and language

Organisation and Support

- **Education and Learning:** learning from other mountain destinations; community information campaign; get tourism businesses involved with Fáilte training programmes; encourage tourism businesses to join Green Hospitality programme so that the area can be promoted as a responsible tourism destination





- **Collaboration and Partnerships:** development of partnerships between community-based recreation and tourism organisations e.g. Knockmealdowns Active, Knockmealdowns Forum, Visit Ballyhoura, Comeragh Mountains Forum, Galtee Partnership; developing linkages between the communities; marketing “co-opetition”; strategic development of the area uniting communities behind a common aim with a strong representative steering group and a lead figure/driver
- **Improved Benefits:** measures to increase economic benefits through linkages between tourism and recreation operators and local suppliers

Market Awareness and Demand

- **Study Area Brand Marketing:** development of a branded recreational destination; preparation of branded print media material e.g. maps and brochure with maps of all walking trails in the area; development of an online digital strategy; use of social media to promote the destination; merging customer databases for online promotions; get media articles placed promoting the area; identify and promote themes; annual photo competition



Strengths	Weaknesses
Opportunities	Threats

Resources and Facilities

- **Further Damage of Natural Features from Existing Uses:** overuse of the most popular paths are leading to erosion of peat / tracks and causing slope instability e.g. The Vee trailhead area, near Bay Lough/ Tipp Heritage Trail/ Blackwater Way confluence; litter at beauty spots from general carelessness and fly-tipping (e.g The Vee Trailhead - no litter bins/ recycling points provided); severe broadening and consequent erosion of tracks from quad bikes/4WD vehicles; noise pollution for other mountain users/disruption of nesting/ roosting birds, an issue of key concern to the local Game & Conservation Clubs
- **Additional Damage from New and Increased Usage:** increased recreational use could lead to negative environmental impacts, particularly on designated areas; despite the current strong environmental protection, there is growing environmental pressure from walking/hiking, quad-biking, scrambling, burning scrub etc, and between different recreational uses e.g. walking/cycling/quad-biking/para-gliding; and growing recreational disputes between shooting, 4WD, burning scrub, coillte forestry,
- **Inadequate Development of Signage and Facilities:** inadequate and inconsistent signage on walking trails and roads; continued decline in the B&B sector resulting in a lack of accommodation stock; lack of wet day family attractions

Organisation and Support

- **Leadership and Funding:** parochial self interest; lack of leadership in driving collaboration and creating sense of ownership of tourism and recreation development and operation; lack of financial and human resources to drive the concept at a national, regional and local level;
- **Planning and Implementation:** inadequate coordination of planning; loss of momentum without quick wins; creation of false hope/expectations
- **Limited Local Support:** little increase in economic benefits to the local communities resulting from the destination being used by tourism (with many activities in the area involving free access) rather than using it to generate a return to livelihoods and conservation, leading to community disaffection with tourism and recreation development in general and with the single destination approach in particular; ageing community activists and volunteers

Market Awareness and Demand

- **Market Confusion:** failure to create a distinctive identity and brand awareness among tourist markets for the study area
- **Inadequate Targeting and Packaging:** failure to create market-ready products and experiences in line with the needs of targeted segments in international markets

3.12 Product Audit and Situation Analysis Summary

3.12.1 Key Hub Identification

Visitor hubs in the area are divided into Primary Destination Gateways and Secondary Destination Gateways (see section 3.2). The justification for the selection of the Primary Destination Gateways is as follows:

- **Cashel:** strategic location in close proximity to the Galtee Mountains, strategic location on the M8 motorway from Dublin-Cork and Bus Eireann route 8 connection between Dublin-Cork, key visitor hub with one of Ireland's most visited heritage attractions, the Rock of Cashel (see section 3.4), historic town walk, Visitor Information Point, highest accommodation range of all towns and villages within the study area (see section 3.9.1).
- **Clonmel:** location on the N24 Limerick-Waterford road, proximity to the Galtees, Knockmealdowns and Comeraghs, Bus Eireann route 7 connections between Dublin-Kilkenny and Cork, and 55 from Limerick to Waterford; ease of access to Kilkenny via the N76; county town status and accommodation range, Visitor Information Point, 2nd highest accommodation range (see section 3.9.1).
- **Mallow:** location on the N20 Limerick-Cork road, rail connection to Dublin, Limerick and Cork; location on Bus Eireann route 51 from Cork to Galway via Limerick and significant accommodation range, Visitor Information Point, 3rd highest accommodation range (see section 3.9.1).
- **Dungarvan:** proximity to the Knockmealdowns and Comeraghs; ease of access to Waterford and Cork via the N25 and on the Bus Eireann route 40 and accommodation range, Discover Ireland Centre, 4th highest accommodation range (see section 3.9.1).
- **Cahir:** location on the N24 Limerick-Waterford road, proximity to the Galtees and on the route of the M8 motorway; Bus Eireann route 8 between Dublin & Cork and 55 from Limerick to Waterford; and rail connection to Waterford and Limerick and accommodation range, Discover Ireland Centre, heritage hub with Cahir Castle and Swiss Cottage, Centre of Excellence for Angling, 5th highest accommodation range (see section 3.9.1).
- **Mitchelstown:** strategic location in close proximity to the Ballyhouras, Galtees and Knockmealdowns; Bus Eireann connection to Cork, Limerick, Dublin, Waterford and Kilkenny; and on the route of the M8 motorway, 6th highest accommodation range (see section 3.9.1).
- **Tipperary:** location on the N24 Limerick Waterford road, proximity of Limerick Junction rail station, location on the Bus Eireann 55 route from Limerick to Waterford, accommodation and visitor facilities range, proximity the Glen of Aherlow, 7th highest accommodation range (see section 3.9.1).
- **Charleville:** location on the N20 Limerick-Cork road, rail connection to Dublin, Limerick and Cork; location on Bus Eireann route 51 from Cork to Galway via Limerick and the Charleville Park Hotel.

Justification for the selection of **Secondary Destination Gateways** is as follows:

- Kilmallock – heritage town with wide range of medieval heritage, selection of accommodation including hotel, proximity to Ballyhoura Forest mountain bike trails
- Kilfinane – picturesque town with range of adventure activities, proximity to Ballyhoura Forest mountain bike trails
- Doneraile – attractive town with potential of Doneraile Court as a significant visitor attraction
- Clogheen – location at the confluence of several way-marked way walking routes

- Cappoquin – popular visitor town, selection of accommodation, area popular with anglers, proximity of forest park
- Ballymacarbry – location in close proximity to the Nire Valley for walking in the Comeraghs and angling.
- Carrick-on-Suir – attractive location, Ormonde Castle, heritage centre and selection of accommodation
- Lismore – heritage town, well-run Heritage Centre, Lismore Castle gardens, access town for the Knockmealdowns.
- Lisvarriane – location in the Glen of Aherlow Centre of Excellence for Walking with wide range of walking routes, accommodation range

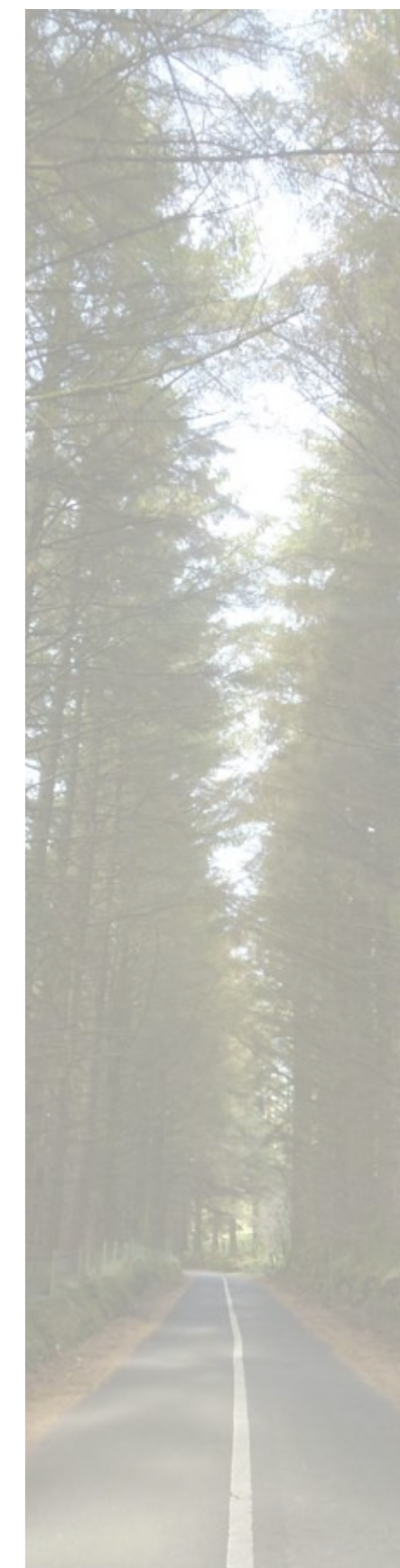




Table 19: Gateways to the Study Area

Tier 1: Large Urban Areas	Tier 2: Towns & Attractions outside study area	Tier 3: Primary Destination Gateways	Tier 4: Secondary Destination Gateways
Cork (190,196)	Youghal	Cashel	Kilmallock
Limerick (91,303)	Midleton (Midleton Distillery)	Mitchelstown	Kilfinane
Kilkenny (24,423)	Blarney (Blarney Castle)	Cahir	Doneraile
Waterford (46,732) ¹		Clonmel	Clogheen
		Dungarvan	Cappoquin
		Charleville	Ballymacarbry
		Mallow	Carrick-on-Suir
		Tipperary	Lismore
			Lisvarriane

3.12.2 Adventure Product

Walking

- There are a very wide range of walks to suit all levels of walkers from beginners to hardened long distance hikers as well as those interested in the historic heritage on historic town walks within the study area. The product is of a high standard - The Glen of Aherlow was designated as a Centre for Walking Excellence by Fáilte Ireland due to the quality of the walking product on offer and some of the Nire Valley walks offer visitors outstanding views over the surrounding countryside. There are many walking clubs and festivals – testament to both the local demand for walking and to the interest in the area from the domestic and international markets.
- St Declan’s Way** pilgrimage route from Ardmore to Cashel offers an opportunity to target the pilgrimage market. However much of this route is currently on-road and there could be an opportunity to increase the proportion of off-road route over time.

- However there are currently no **walking maps** available which link these walks and which provide visitors to the area with a resource with which to plan their activity. There is an opportunity to provide detailed information on the walk in the study area, to provide a dedicated website with downloadable maps and for integrated promotion of the walking product.
- In terms of **visitor infrastructure** many trailheads, particularly The Vee, require upgraded car-parking, litter management and toilet facilities to bring the product offer in line with other destinations within Ireland and other countries.



- There are opportunities for the development of **new products** such as the County Wall walk which may require permissive access agreements with landowners; and for the development of a walking route which links the whole area. One possibility could be development of a **new waymarked way walking route** which combines The East Munster Way from Carrick-on-Suir-Clonmel-The Vee; and the Four-Counties route from the Vee to Galtymore Mountain; then linking Galtymore summit to The Ballyhoura Way in the Glen of Aherlow and on to Kilfinane-Ardpatrick-Kilmallock. This route from Carrick-on-Suir to Kilmallock would take in the four mountains and many of the valleys in between. This route has the advantage of combining stretches of several existing walking routes.
- There is currently no data for walkers using the various long distance and shorter routes. Installation of **track counters** at selected locations would enable monitoring over time leading to better decision making.
- Some on-road routes may be better suited to use as cycling routes. However there may be conflicts on these and other routes between cyclists and walkers unless each uses trails with care.
- Increased synergy is required between the product available and the product providers such as accommodation and facilities/services in the towns and villages in the study area. Increased consideration of the timing of services and use of the Walkers Welcome approach could lead to increased visits by walkers. There are also opportunities or guiding services in the study area – interpreting the natural, cultural and archaeological, and geological features of the area for walkers.

⁴⁴ CSO Census 2011

- **The key message is that there is an impressive walking product offer in the study area that enables national and international comparison. The challenge is to package & promote this and to capitalise on the popularity of walking festivals to encourage greater numbers of walkers into the area. This needs to be combined with measures to offer better services in towns & villages and walker-friendly accommodation.**
- **The focus for the walking product is both on the hard adventurers – those that are likely to arrive on day visits from the domestic market or walking holidays from the international markets but from whom the economic return might not be that significant; and on the Culturally Curious and the Great Escapers segments - who are more likely to engage in shorter walks as an additional activity to visiting heritage attractions, and from whom the economic return is likely to be greater. However the provision of facilities for the former is likely to make the area more attractive for the latter due to the existence value of recreational opportunities.**

Cycling

- Similar comments can be made regarding the cycling product as with walking. When the study area is considered as a whole there is considerable cycling product in terms of attractions (Ballyhoura), routes and tours. There are also many cycling clubs in the area indicating both the strength of the product offer and the local demand.
- **There is an opportunity to provide better information on cycling in the area through use of maps, downloadable cycle routes and better on-road signage. This combined with the provision of better cycling facilities for visitors, through implementation of a Cyclists Welcome type approach and better infrastructure, such as bike parking in towns and villages, could encourage greater use of cycling routes in the area.**

- The Ballyhoura cycle trails offer a premier adventure tourism product in the area yet very few of the accommodation providers offer visitors information on the trails either on their websites or in their establishments. This is surprising given that it could entice visitors to stay another day with associated revenue benefits and is an **opportunity for accommodation product providers.**
- **The same comment regarding product:matching made for walking also applies to cycling.**

Angling

- As with walking and cycling there is a diverse range of high quality angling product in the study area of interest to many domestic and international anglers. The challenge again is to **promote this product and to link it with other products** in the area such as other forms of recreation and accommodation.
- There is a further opportunity for a promotional area body to work with Inland Fisheries Ireland (FI) and local angling clubs to **promote and manage** the area in the most effective way possible to encourage greater numbers of anglers to come to the study area. This includes making day licences easier to obtain and enabling **better access** to rivers and lakes.
- One of the best fly-fishing tackle shops in the country, Clonanav Fly Fishing is based near Ballymacarbry and also offers fly fishing instruction and related accommodation. This presents an opportunity for accommodation to offer this activity as an add-on to their website within their establishment. There are also opportunities for **sea-fishing** with three providers based at Dungarvan.
- **Angling as an activity is more specialised and the core target markets, identified in Chapter 2, should be the focus for driving an increase in angling tourism.**

Orienteering/Hill-running

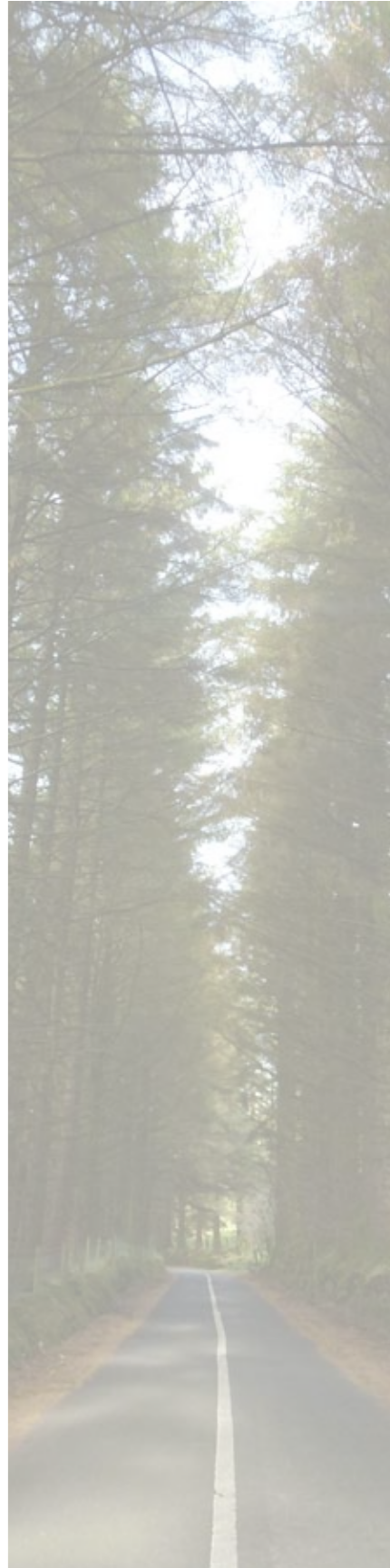
- Cross country adventure races are becoming increasingly popular. While there may be some related economic benefit in terms of additional overnight and ancillary revenue this must be balanced against associated environmental impact. Brecon Beacons National Park has incurred multiple incidences of severe track erosion from concentrated use of trails during running races. Given the relatively fragile peat surface of much of the study area the **potential environmental impacts** from this type of use need to be taken into account when considering promotion.
- **Geo-caching is becoming increasingly popular and may present an opportunity for a marketing focus and for bundling activities with accommodation.**

Equestrian

- There are a range of equestrian options within the study area and, as with other adventure tourism products. The challenge is to make visitors **aware of this product offer** - creating the link between the visitor and the product through better promotion and opportunities to take part.
- Opportunities exist to map existing and develop **new riding routes**. This could be marketed under a similar brand as the 'Horses Welcome' scheme operated by the British Horse Society (BHS).
- **The opportunity for boosting equestrian tourism is in increasing the linkages between the product and the market through the increased use of bundling with accommodation in the area.**

Bird-watching

- While a relatively small market there may be opportunities to **create bird hides, provide interpretation and to promote the product and associated accommodation** to members of the RSPB in the UK and Birdwatch Ireland.





Golf

- As with other forms of adventure tourism in the study area there is a range of quality golf related product that could be used for a marketing advantage if promoted as part of an **integrated activity product** in the area.
- An opportunity could exist in the extension of the Suir Valley Challenge Pass concept to the wider study area.

Multi-Activity Centres

- The four adventure centres offer a wide range of outdoor pursuits and with their trained guides offer a focus for the delivery of adventure activities in the area. Many of these activities could be **offered by accommodation providers** in the area as an add-on and could contribute to raising the profile of the area as an adventure destination and help retain visitors in the area for longer.

3.12.3 Built Heritage

- The study area contains some of the finest mediaeval built heritage in the country including the Rock of Cashel, Cahir Castle, The Main Guard in Clonmel, Ormond Castle in Carrick-on-Suir, Lismore Castle, King John's Norman Castle in Dungarvan, the many structures in Kilmallock such as the Town Gate, town centre buildings and the religious heritage, Doneraile Court, Kilbolane Castle near Charleville and Fethard's medieval town walls.
- While some of these are significant visitor attractions such as the Rock of Cashel and Cahir Castle there are many which have great potential yet are **currently underdeveloped**, such as Ormond Castle, Doneraile Court and the many buildings in Kilmallock, and their tourism potential could be enhanced through targeted development. The majority of these buildings are under the control of the OPW which has now been tasked with maximising the tourism potential of the structures it manages.

- **In addition to maximising asset potential the opportunity here lies in integration with the adventure product and raising awareness amongst visitors about what the area has to offer. The target market segment is the Culturally Curious and Great Escapers segments from the international market and the domestic market, particularly VFR.**

3.12.4 Cultural Heritage

- The study area has a wide variety of cultural heritage ranging from the several heritage centres such as those at Cashel, Carrick-on-Suir and Lismore; several interesting museums with eclectic formal and informal displays of local cultural heritage, such as the County Waterford Museum in Dungarvan, the Fethard Folk Farm & Transport Museum, South Tipperary County Museum in Clonmel and the Copper Coast Geopark Visitor Centre in Bunmahon. Lismore Heritage Centre **'Great Days Out'** is an innovative concept that packages tours for visitors. These include 'The Great Day Out', 'The Foodie Day Out' and 'The Garden Day Out'. These can be tailor made to suit different tour groups. The Heritage Centre staff helps to make all arrangements. This concept could be extended to a wider area and offered by several outlets.
- There are many local food, craft and art producers who could be linked and promoted through use of a trail concept. **However one of the issues with the establishment of similar food & craft trails elsewhere is the degree to which producers are set up to cater for visitors on site. This needs to be investigated prior to the establishment of a trail. Increasing the linkage between food producers and accommodation could also be an opportunity so that accommodation producers stock and use local food and celebrate that in their marketing and menus – providing visitors with a distinctive local experience.**

- Given the area covered by the study area and the variety of terrain and scenery, a **themed driving tour which links the settlements and attractions** is an opportunity.
- There are many festivals in the study area covering a wide range of areas including adventure, music, art and dance. Some attract very large numbers and there also many sporting events capitalising on the resources in the area such as the Ballyhoura mountain bike trails. Further coordination and promotion of these one an area wide basis is a marketing opportunity that will appeal to all target markets. **There is an also an opportunity to develop a new festival to showcase the study area as a unique destination of built, archaeological, cultural and activity excellence.**
- **Again the target market segment is the Culturally Curious and Great Escapers segments from the international market and the domestic market, particularly VFR. Additional opportunities lie in the provision of packaged itineraries to cruise ships visiting Cork and to schools, residential care homes and overseas tour companies.**



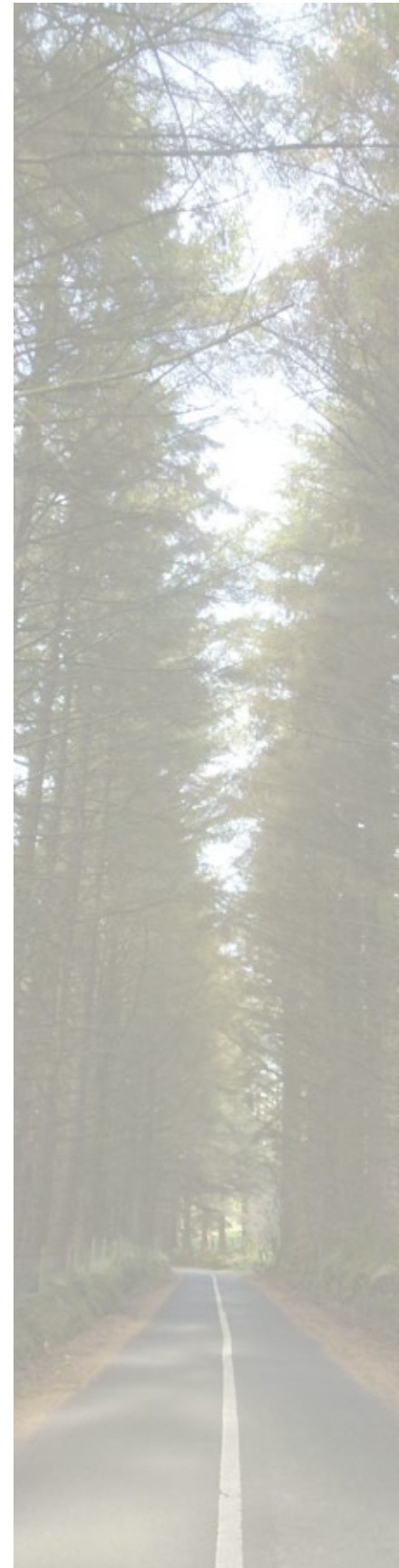
3.12.5 Natural Heritage

- The study area contains much valuable natural heritage as shown by the range of designated areas including 1 NHA, 44 pNHA's and 4 SPA's. There may be opportunities for further development of associated **nature walks, bird-watching opportunities** and for the development of wildlife corridors within the area.
- Perhaps the greatest potential, in terms of natural heritage, for attracting visitors to the area and retaining them for longer are the thirteen **Forest Recreation Sites** operated by Coillte. These offer visitors many looped and linear walks, picnic sites, nature walks, views and opportunities to engage with the history of the area through heritage interpretation. The opportunity here is to increase the provision of information to visitors – increasing their awareness of the existence of the forests and the facilities available within them.
- The geography of the area, with many roads passing over the mountains, particularly at The Vee, the Ballyhouras and the roads around the Comeragh mean there are **exceptional views** inland over traditional farmland and towards other ranges, and out to sea over the Waterford coast. These are an integral part of the product offer for the study area. **It is clear that the spectacular views at various places in the study area would be significantly impacted by the proposals for the Eirgrid pylon network. There is clearly strong community feeling and it is considered that, in the interests of visual amenity and the long term value of the scenic nature of the area, the preferred option in this part of the country would be the under-grounding of the pylon network.**
- As with Crafts and Food there is an opportunity to develop a **Gardens trail** in the study area. By their nature gardens are more likely to be able to cater for visitors so this may be a more achievable option.

- **The target market segment for this area includes hard adventurers drawn to forest-based activity and the Culturally Curious and Great Escapers segments likely to be drawn to nature walks, views, gardens, food, art and craft.**

3.12.6 Accommodation

- From the data it can be seen that the primary accommodation centres within the study area are Cashel, Clonmel, Mallow, Dungarvan, Cahir, Mitchelstown, Tipperary Town, Kilfinane and the Glen of Aherlow.
- Currently there is no marketing advantage to be gained by promoting the area as a centre of sustainable tourism as only one business, Charleville Park Hotel, is listed on either the www.ghawards.ie or the Fáilte Ireland Green Pages as having environmental accreditation. **Increasing the profile of the area as a responsible tourism destination could be an opportunity for the future** e.g. an annual percentage increase in the proportion of accommodation with an environmental management accreditation driven through education, training and support.
- **Opportunities for accommodation also include maximising linkages with the food sector within the study area, using local produce on the menu and for sale within establishments. Linkages with recreation activities and local guiding could increase new businesses and encourage visitors to stay for longer in the area.**



CHAPTER FOUR: BEST PRACTICE CASE STUDIES

This chapter discusses best practice for the tourism and recreational development of inland rural areas with strong natural resources involving multiple administrations. Relevant examples are drawn from the UK, the USA and Estonia.

4.1 Key Findings and Conclusions

- **Leadership** and **organisation** are the principal prerequisites to the successful development of a collaborative regional development across multiple administrations and communities. A “champion” is needed – ideally a set of “champions” - to communicate the merits of coordination and cooperation across all sectors of society in the project area. These leaders cannot work in isolation; they need a supportive institutional framework with all levels of stakeholders being represented.
- A preparedness to subjugate narrow territorial and parochial interests for the **greater benefit of the wider region** is equally vital, though this may only be achieved through a programme of information dissemination using local media and personal involvement in meetings etc of the project’s leader(s).
- It is a **long term process** since the twin imperatives of **building support from throughout the region** and **getting the product offer right** (including directional signage, road and other forms of access including appropriate vehicle parking, trail development and maintenance, interpretative signage, accommodation and catering outlets of the right type and in the right locations, personnel training) **should all precede any extensive and intensive market launch and promotional activities**.

- **Partnerships and alliances** are important both to garner wide support for the project and also as active partners in components of the project that are not directly related to tourism and recreation but that facilitate sustainable use of natural features and cultural heritage sites. **Membership schemes** represent effective ways to reinforce support and contribute to the finance of the organisation responsible for overseeing the development and marketing of the area.
- **Information/visitor centres are valuable** both in terms of aiding visitor enjoyment of the area and in generating income through sales of goods and services
- The **availability of funding** will determine to a major extent what can be done and, in all likelihood, limit the ambition of the project in the short term. However, well-designed and –executed small project components as part of a coherent plan that is fully supported across the region can:
 1. act as a powerful persuader for funding agencies to support the project, and
 2. demonstrate the mutual benefit of working with the project to individual operators and community groups.



4.2 Mountain Rural Areas in the UK

The three case studies examined are:

- The Lake District
- The Peak District
- The Brecon Beacons

They are frequently used as case studies, not only because they have been the subject of much monitoring and analysis over the years, but also because they provide outstanding examples of the beneficial impacts of managing natural resources for tourism and recreational use.

4.2.1 The Lake District

History

- Lake District tourism was popularised from the late eighteenth/early nineteenth centuries through the writings of Wordsworth, Southey and Coleridge promoting the beauty and splendour of the landscape to a nation eager to escape the growing cities.
- Political problems in Europe also meant that wealthy tourists, who might otherwise have done a grand tour of the great cities of Europe, were looking for opportunities to travel closer to home.
- The “working classes” soon joined the ranks of holiday makers, partly because improved working conditions led to a shorter working week, increased wages and paid leave. The railway reached Windermere in 1847 followed by further lines to Keswick and Lakeside. These allowed many more people from a wide range of social classes to visit on day trips from the industrial areas of the North East and North West of England.

- Improvements in the roads and widespread car ownership led to ever increasing numbers of visitors from the 1960’s despite competition from low cost foreign charter holidays.
- The Lake District National Park was established in August 1951. It is one of 15 in the UK, the others being: Brecon Beacons, the Cairngorms, Dartmoor, Exmoor, Loch Lomond and Trossachs, Northumberland, North York Moors, Peak District, Pembrokeshire Coast, Snowdonia, South Downs, the Yorkshire Dales, the Broads and the New Forest.

The Area

- The Lake District National Park is England’s largest and covers 2292 square kilometres or 885 square miles.
- It stretches 53 km from west to east, and 64 km from north to south
- It is home for over 40,000 people, representing a population density of 18.4 per square kilometre (source: 2011 census).
- Of the total 22,930 dwellings, two-thirds are owner occupied, one third are rented, with 15% being second or holiday homes (source: Corporate Information Unit at Cumbria County Council).



Role, impact and management of tourism

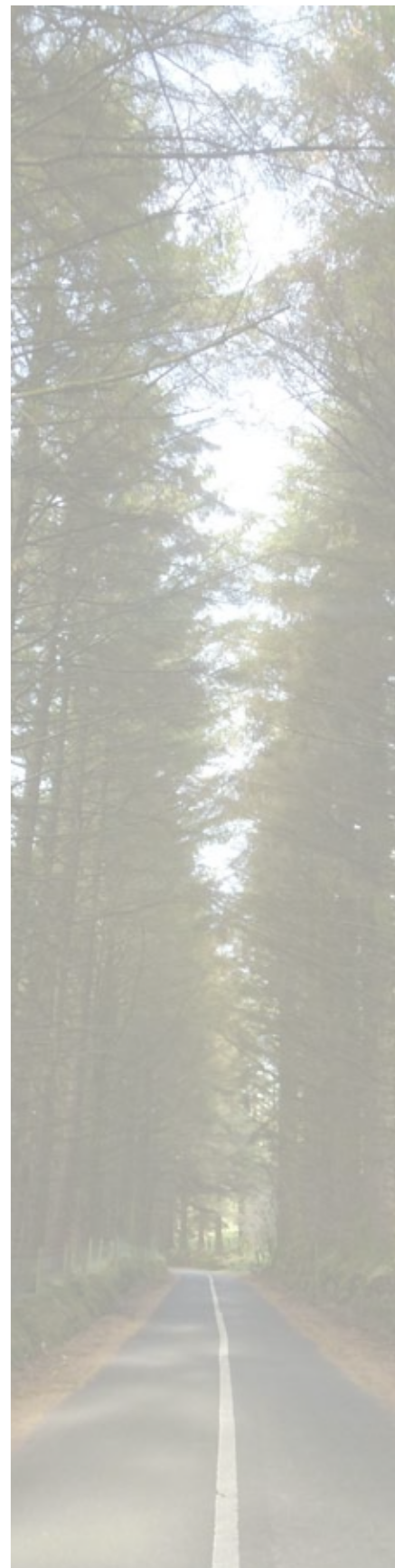
Tourism is the mainstay of the Lake District economy. In common with many rural areas it has taken over from farming as the main source of income. Many farmers have diversified into tourism by providing accommodation and services for visitors.

Tourism brings great benefits to the area. Visitors spend money on accommodation, food, drink and leisure activities and indirectly support other business such as wholesalers and the building trade. Tourism statistics from STEAM 2012: Cumbria Tourism:

- Income: In 2012 visitors spent £994 million in the Lake District
- Numbers: In 2012, 14.8 million tourists visited the Lake District
- Employment: Tourism provided 11,903 jobs (full time equivalents) in the National Park
- Almost nine-out-of-every-ten visitors to the Lake District come by private motor vehicle

Tourism has to be managed to maximise the benefits while preserving the area’s beauty that visitors come to experience. Main challenges are:

- Traffic congestion and parking
- Footpath erosion
- Affordable housing for local people resulting from prices being pushed up by demand for holiday homes
- Pollution and litter
- Jobs are often seasonal and wages are low





Lake District National Park Authority and Lake District National Park Partnership

It is run by a local government body, called the Lake District National Park Authority (LDNPA), funded by UK government. As set out in the Environment Act 1995, the LDNPA's statutory purposes are:

- To conserve and enhance the natural beauty, wildlife and cultural heritage of the Lake District National Park; and
- To promote opportunities for the understanding and enjoyment of the special qualities of the National Park by the public.

It also has a duty in pursuing those purposes to seek to foster the economic and social well being of local communities within the National Park by working closely with the agencies and local authorities responsible for these matters, but without incurring significant expenditure.

It does this through working in partnership with a range of different organisations such as:

- Landowners
- Farmers
- The tourist industry
- Local councils
- Conservation organisations
- Local businesses.

The Lake District National Park Authority differs from a local authority because:

- instead of councillors, the LDNPA has a board of 22 Members, some being elected members of the District and County councils, while others are appointed by the Secretary of State for their knowledge of relevant issues such as conservation, tourism education and transport.

- National Park Authorities do not have the same responsibilities as a local council in respect of activities such as rubbish collections, or road repairs.

The LDNPA's main areas of responsibility are for planning, countryside management, access, information and education.

Its stated future aims are to:

- sustain the landscape, wildlife and cultural heritage which have always attracted visitors.
- improve the visitor experience by providing better services such information, public transport and improved public toilets
- improve access to the countryside and water
- provide more opportunities for adventurous activities and things to do when it is raining
- offer local food and crafts distinctive to the area
- ensure that good quality accommodation is available at a wide range of prices

In 2006, key organisations with a role in the Lake District National Park combined to form Lake District National Park Partnership (The Partnership) and agreed the Vision for 2030 for the Lake District National Park to be an inspirational example of sustainable development in action, comprising four strands: a prosperous economy, world class visitor experiences, vibrant communities which together sustain the spectacular landscape, its wildlife and cultural heritage.

The Partnership is made up of representatives from the public, private, community and voluntary sectors (see members listing attached). The Partnership owns the Vision. They work to make it happen through the Partnership's Plan which contains actions. The LDNPA is a member of the Partnership, acting as an equal partner. It has a well-defined role to develop new planning policies which manage development in the National Park. These are contained in the Local Plan comprising Process and Development Documents. The Partnership works together to resolve potential areas of conflict and to seek solutions. It is the first in the English family of National Parks to come together in this way and remains unique in its approach.

All National Parks are funded from central government, not from the people who live there. In Wales and Scotland the money is allocated by the Welsh and Scottish Governments.



Table 20:

Authority	2010-11	2011-12	2012-13	2013-14*
Brecon Beacons	3,302,269	3,215,500	3,402,253	3,387,834
Broads	4,229,502	4,002,149	3,774,799	3,547,447
Cairngorms	4,946,000	4,756,000	4,646,000	TBC
Dartmoor	4,739,642	4,484,867	4,230,095	3,975,321
Exmoor	3,978,580	3,764,715	3,550,853	3,336,989
Lake District	6,921,279	6,549,233	6,177,190	5,805,144
Loch Lomond & The Trossachs	7,122,000	6,768,000	6,648,000	6,499,987
New Forest	4,028,096	3,811,570	3,595,046	3,378,520
North York Moors	5,428,266	5,136,475	4,844,687	4,552,897
Northumberland	3,311,334	3,133,337	2,955,341	2,777,344
Peak District	8,298,814	7,852,720	7,406,630	6,960,536
Pembrokeshire Coast	3,462,640	3,368,100	3,554,853	3,540,433
Snowdonia	4,435,091	4,316,400	4,503,153	4,488,733
South Downs	7,290,000	11,373,133	10,981,271	10,589,405
Yorkshire Dales	5,398,563	5,108,369	4,818,178	4,527,984

* Figures for 2013-14 are forecasts

National Park Authorities also get some money from other sources such as the European Union and from earning money themselves.



THE VISION FOR THE LAKE DISTRICT NATIONAL PARK
2006-2030

Agreed by the Lake District National Park Partnership 4 May 2006

The Lake District National Park will be an inspirational
example of sustainable development in action.

A place where its prosperous economy, world class visitor
experiences and vibrant communities come together
to sustain the spectacular landscape, its wildlife and
cultural heritage.

Local people, visitors, and the many organisations
working in the National Park or have a contribution to
make to it, must be united in achieving this.

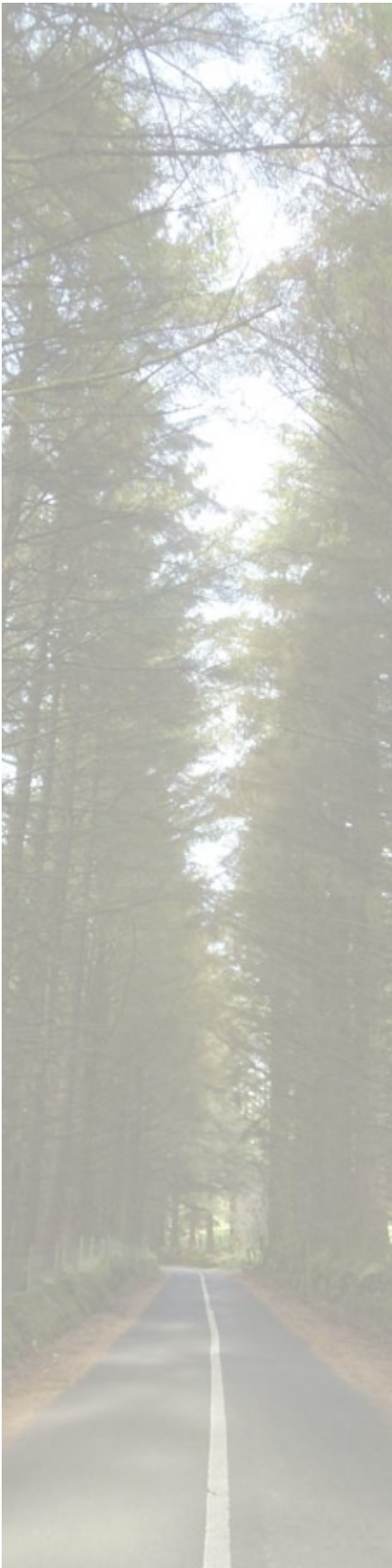
What will it actually look like?

The 4 key elements of the Vision will act as one and we will
see:

A prosperous economy – Businesses will locate in the
National Park because they value the quality of opportunity,
environment and lifestyle it offers – many will draw on a strong
connection to the landscape. Entrepreneurial spirit will be
nurtured across all sectors and traditional industries maintained
to ensure a diverse economy.

World class visitor experiences – High quality and unique
experiences for visitors within a stunning and globally
significant landscape. Experiences that compete with the best
in the international market.

Vibrant communities – People successfully living, working
and relaxing within upland, valley and lakeside places where
distinctive local character is maintained and celebrated.





A spectacular landscape, its wildlife and cultural heritage – A landscape which provides an irreplaceable source of inspiration, whose benefits to people and wildlife are valued and improved. A landscape whose natural and cultural resources are assets to be managed and used wisely for future generations.



4.2.2 The Peak District

History

The Peak District National Park is an area of 1,438 square kilometres, spread over parts of the counties of Derbyshire, Staffordshire, and Cheshire. In 1951 it became the first National Park to be designated in the UK.

Peak District National Park Authority

The Peak District National Park Authority (PDNPA) administers the Park, its purpose being to:

- conserve and enhance the natural beauty, wildlife and cultural heritage of the Peak District
- to promote opportunities for the understanding and enjoyment of the Peak District's special qualities

It has an obligation also to foster the economic and social well-being of the local communities through improving the quality of people's lives without using up natural resources that cannot be replaced.

There are 30 members of the National Park Authority; 16 are appointed by county, district, city or borough councils and 14 are appointed directly by the Secretary of State; of these 8 are appointed because they are specialists in the issues that affect the national park, 6 are parish councillors.

The PDNPA's members come from a range of backgrounds, offer a wealth of knowledge and experience, and share a passion for the Peak District National Park.

The Peak District attracts over 16 million visitors a year; it is home to some 38,000 residents and provides over 3,000 jobs, many of which are based on the special qualities of the landscape.

The Management Plan 2012 – 2017 is structured around four interlinked themes which allow partners to deliver in ways which integrate the many issues facing the national park. The themes of a sustainable economy and thriving communities are given a high level of prominence in the plan which was prepared jointly by the many stakeholders in the national park, and reflects a joint responsibility for delivery. The plan embraces new ways of working and contemporary issues whilst staying faithful to national park purpose.

The Vision is The Peak District National Park as a place where beauty, vitality and discovery meet at the heart of the nation. This will be delivered through four planks. In addition to the delivery plan a number of high level measures are selected to track progress over time under each of the four planks. These are long term measures which will be updated annually or biannually. These are as follows:

A Diverse and Cherished Landscape

- Number of cultural heritage assets at risk
- Number of agri-environment agreements by area
- Number of key species and habitats
- Per capita CO2 emissions

A Welcoming and Inspiring Place

- Overall satisfaction of visitor experience to the national park
- Number of people who have developed a deeper understanding of the special qualities of the Park
- Number of volunteers
- Number of people participating in outdoor recreation
- Number of overnight stays

- Number of people arriving or using sustainable means of transport

Thriving and Vibrant Communities

- Resident awareness of and satisfaction with community life which supports the sustainability of the village
- Delivery of affordable housing given the available subsidies
- Access to services by public transport
- Access to high-speed broadband
- Number of local people volunteering
- Number of communities with village or neighbourhood plans

An Enterprising and Sustainable Economy

- Value of the Peak District by agri-environment schemes
- Value of visitor spend within the Park
- Employment floorspace managed in line with the LDF core strategy
- Number of planning applications approved which provide business opportunities in accordance with the LDF core strategy
- Contribution of businesses to the management of the landscape and cultural heritage

Partnerships and Alliances

The PDNPA works with an extensive range of organisations and groups to look after the Park. These include the following main partnership groups and projects.

[Dark skies](#)

The Peak District National Park Authority, Nottingham Trent University and the Science and Technology Facilities Council have announced the creation of several new national dark sky discovery sites. One of these sites is located at the Peak District National Park's Access for All site at Surprise View near Hathersage.

[Fire Operations Group \(FOG\)](#)

The Fire Operations Group (FOG) was formed in 1996 after a serious moorland blaze. It brings together a partnership of six fire services, national park rangers, National Trust wardens, water companies, major landowners and gamekeepers. The group draws up fire plans, oversees specialist fire-fighting equipment, raises awareness of moorland fires and the consequences, and prepares and trains for emergencies.

[Friends of the Peak District](#)

Friends of the Peak District is an independent charity working to protect and enhance the Peak District's landscapes and countryside for everyone – both visitors and residents – to enjoy. Its vision is of a living, working countryside that changes with time, but remains beautiful forever.

[Local Access Forum](#)

The Peak District Local Access Forum is an independent group that meets regularly to review and advise the National Park Authority and Derbyshire County Council on improvements to public access to the countryside of the Peak District. The forum first met in December 2000 following the Countryside and Rights of Way Act 2000. It was re-established in 2003 with new members.

[Local Nature Partnership](#)

The Local Nature Partnership (LNP) is a partnership of individuals, businesses and organisations working together to better understand, appreciate, value and enhance the local natural environment. Its ambition is to see a thriving and inspiring landscape richer in bio- and geo-diversity; where a valued natural and cultural environment, central to decision-making, is managed for wildlife, promotes healthier lives and benefits the local economy.

[Moors for the Future](#)

Moors for the Future is a partnership project to restore large parts of the internationally important Peak District moors. Moors for the Future, launched in 2002, is a partnership project funded by the Peak District National Park Authority, National Trust, Natural England, RSPB, United Utilities, Severn Trent Water, Yorkshire Water, Environment Agency and Derbyshire County Council.

[National Trust](#)

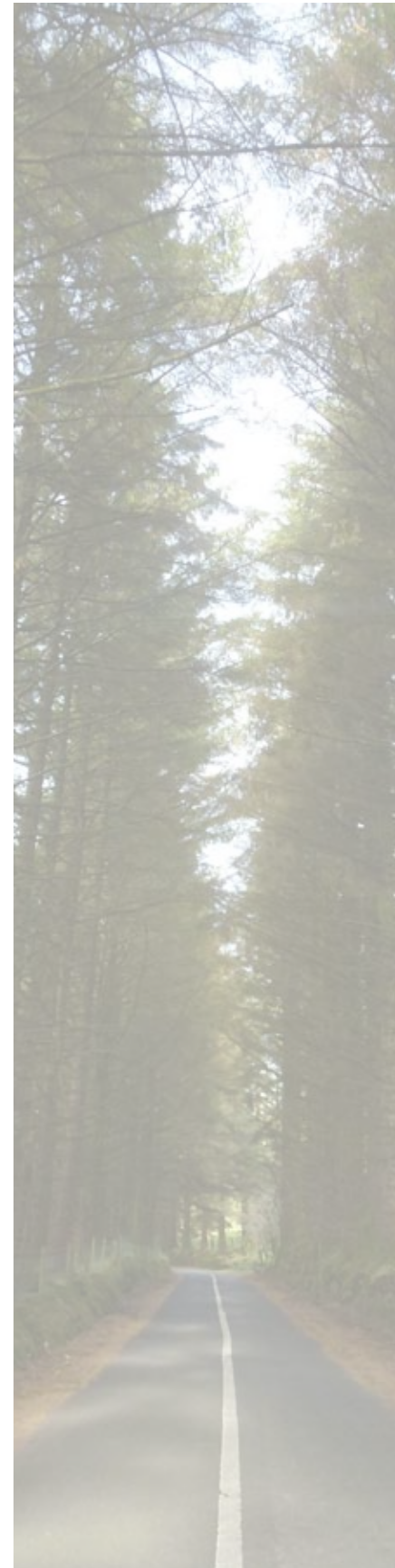
The National Trust is the biggest individual landholder in the Peak District National Park, responsible for 12% of land (17,507 hectares). This includes land that has been covenanted to the National Trust, but which is not actually owned by them.

[Peak Park Conservation Volunteers](#)

The Peak Park Conservation Volunteers (PPCV) enables people of all ages and backgrounds to take part in conservation projects within the Peak District National Park. Volunteers carry out a wide variety of projects that would not normally be done by the national park's own staff, local craftspeople or outside contractors.

[Peak Park Parishes' Forum](#)

The Peak Park Parishes' Forum (PPPF) was established in April 1994 to work for, and on behalf of, local councils (i.e. Parish or Town Council or Parish Meeting) within the Peak District National Park.





Stanage Forum

The Stanage Forum is a ground-breaking process which began back in 2000. It has found agreement on how to manage one of the best loved areas of countryside in the UK, by consensus with all of its many stakeholders. The area in question is the Stanage/North Lees Estate near Hathersage in Derbyshire, which is owned by the Peak District National Park Authority. The forum provides opportunities for everyone to become involved in its management.

Trails Steering Group

The Trails Management Plan covers a five-year period and focuses on the management of the four Authority-owned recreational trails: the Monsal Trail, the Tissington Trail, the High Peak Trail and the Thornhill Trail. All four trails are popular with a wide variety of users, including walkers, cyclists and horse riders. The trails steering group, which represents the main interest groups and user groups associated with the trails, was instrumental in developing the Trails Management Plan.

Visit Peak District

Visit Peak District & Derbyshire is the official Tourist Board for the Park. It has just launched its first-ever television commercial as part of a £150,000 multimedia campaign to tempt more visitors to the area and boost the economy, targeting viewers in ITV's Anglia and Central (East and West) regions.

The advert launches the second phase of the Visit England-led campaign 'Growing Tourism Locally', financed by the government's Regional Growth Fund.

Visit Peak District & Derbyshire is forging ahead with marketing campaigns worth £600,000 with the RGF's help, including match funding from a range of private sector partners, in an attempt to boost tourism spend and create thousands of jobs until 2015.

The commercial will be broadcast in two phases: a significant push on the main ITV network during January and February and then a follow-up using Video on Demand (VOD) in February and March.

"Our 'World Away' campaign has been crafted to target and appeal to specific audiences – young couples without children, couples with pre-school children, over 55s and people organising multi-generational group get-togethers," David James, the tourist board's chief executive, said.

"While we are an all-year-round destination catering for all kinds of people, we are especially keen to encourage staying visitors to come to the area during off-peak periods, when the Peak District is not so busy and they can enjoy an affordable, relaxing and rejuvenating break in one of the most accessible holiday destinations in England."

List of Partners and Stakeholders in Peak District National Park Management Plan

- Adrian Russell Associates (Architects)
- Aggregates Industries
- Bakewell & Eyam Community Transport
- Bakewell and District Civic Society
- Bakewell Town Council
- Barnsley Metropolitan Borough Council
- Beechenhill Farm
- Biodiversity Action Plan Partnership
- British Aggregates Association
- British Mountaineering Council
- Broad Ecton Farm Partnership
- Business Link
- Business Peak District
- Buxton Volunteer Centre
- Calver Weir Restoration Project
- Campaign for National Parks
- Campaign to Protect Rural England
- Chamber of Commerce
- Chamber of Commerce Sustainability Forum
- Chatsworth Estate

- Cheshire East Council
- Coke Turner & Co.
- Country Land and Business Association East Midlands
- Cycling England
- Dark Peak Public Lands Partnership
- Defra
- Derbyshire & Peak District Regionally Important Geological Sites Group
- Derbyshire Constabulary
- Derbyshire Council for Voluntary Service
- Derbyshire County Council
- Derbyshire County Primary Care Trust
- Derbyshire Dales and High Peak Local Strategic Partnership
- Derbyshire Dales District Council
- Derbyshire Economic Partnership
- Derbyshire Wildlife Trust
- Early Mines Research Group
- East Midlands Development Agency
- East Midlands Heritage Forum
- East Midlands Trains
- East Peak Innovation Partnership
- English Heritage
- Environment Agency
- Environmental Quality Mark
- Forestry Commission
- Friends of the Peak District
- Glebe
- Greater Manchester and High Peak Area Ramblers Association
- Haddon Estate
- Heritage Lottery Fund
- High Peak Borough Council
- High Peak Volunteering

Highways Agency
 Hulleys of Baslow
 Kingsmen Consultants
 Kirklees Metropolitan Council
 Lafarge Cement
 Land Managers Forum
 Local Energy Partnership
 Longcliffe Group
 Lower Hurst Organic
 Marches Energy Agency
 Minerals Products Association
 Moorland Association
 Moors for the Future Partnership
 Mosaic Partners
 National Farmer's Union
 National Forest Company
 National Grid
 National Stone Centre
 National Trust
 Natural England
 Network Rail
 Northern Rail
 Northwest Regional Development Agency
 Oldham Metropolitan Borough Council
 Peak Connections
 Peak Cycle Links
 Peak District Educators Group
 Peak District Interpretation Partnership
 Peak District Land Managers Advisory Service
 Peak District Local Access Forum
 Peak District Renewables
 Peak District Rural Housing Association

Peak District Sustainable Energy Group
 Peak Horsepower
 Peak Park Parishes Forum
 Peak Park Watch
 Peak Partners for Rural Action
 Peak11
 Pedal Peak District
 Penny Anderson Associates
 Planning Aid
 Rocking the BOAT
 RSPB
 Rural Action Derbyshire
 Rural Housing Group
 Severn Trent
 Sheffield Area Geological Trust
 Sheffield City Council
 Sheffield City Region Local Enterprise Partnership
 Sheffield Moors Partnership
 Sheffield Wildlife Trust
 Sheldon Parish Council
 Shuttleworth Estate
 South Yorkshire and North East Derbyshire Area of Ramblers
 South Yorkshire Passenger Transport Executive
 Stancliffe Stone
 Staffordshire Council for Voluntary Service
 Staffordshire County Council
 Staffordshire Moorlands District Council
 Staffordshire Moorlands Local Strategic Partnership
 Staffordshire Wildlife Trust
 Stepping Stones to Nature Project
 Sustrans
 Taddington and Priestcliffe Parish Council

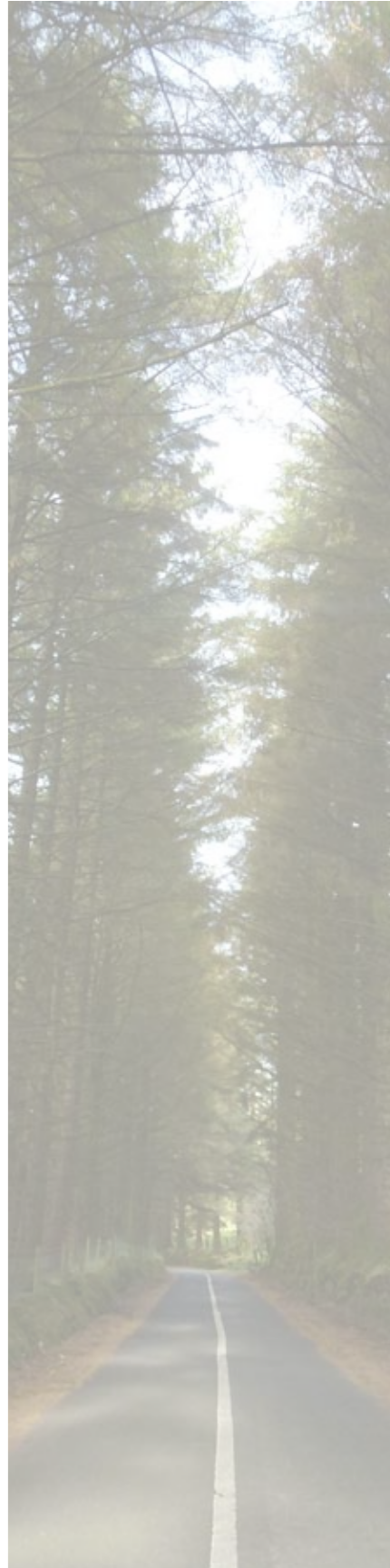
Tameside Metropolitan Borough Council
 Tarmac
 The Coal Authority
 The Ramblers Association (New Mills and District Group)
 Tissington Estate
 TM Travel Ltd
 Trail Riders Fellowship
 Transport for Greater Manchester
 Trent Barton
 Trent Rivers Trust
 United Utilities
 University of Derby
 Visit Peak District
 Walking for Health
 West Yorkshire Passenger Transport Executive
 Yorkshire Forward
 Yorkshire Water
 Youth Hostel Association

References:

www.peakdistrict.gov.uk/

www.visitpeakdistrict.com/

www.peakdistrict.gov.uk/npmp Park Management Plan, 2012 – 2017



WI1 - A WELCOMING AND INSPIRING PLACE

The national park will strengthen its role as a welcoming place and premier destination, synonymous with escape, adventure and enjoyment

	Delivery Aim What are we trying to achieve?	Delivery Action How do we intend to achieve it?	Partners	Delivery Milestones
1.1	1.1 Promote opportunities for tourism across the Peak District as one of England's most significant tourism brands, renowned for its sustainability credentials and high quality visitor experience	1.1.1 Develop and implement a tourism strategy for the wider Peak District holiday destination, consistent with national park purposes and duty, and linking to marketing plans	Visit Peak District Destination Management Partnership , Peak District National Park Authority, High Peak Borough Council, Derbyshire Dales District Council, Derbyshire County Council and Staffordshire Moorlands District Council, National Trust, tourism industry , recreational user groups	Interim Peak District Tourism Strategy to be agreed Dec 2012
1.2	1.2 Enhance the quality of the visitor experience by developing connections to neighbouring urban areas, integrating financially sustainable travel within key corridors, and managing development at popular visitor hubs and 'gateways' to the national park	1.2.1 Identify gaps, opportunities and priorities to: -improve visitor experience and impact at visitor hubs and gateways to the national park -make better connections to the national park using Right of Way and footpaths	Peak District National Park Authority , Derbyshire County Council, High Peak Borough Council, Staffordshire Moorlands District Council, Staffordshire County Council, Pedal Peak District, Local Access Forum, land managers, transport operators, neighbouring urban authorities, Natural England	Opportunities and priorities for hubs and gateways identified by Mar 2013; Data on gaps in ROW and footpaths assembled collectively by Mar 2013;;Walking for Health' grant launched and opportunities for the Peak District explored
		1.2.2 Pursue opportunities such as piloting a community transport service in the Hope Valley that assists visitors as well as residents	Bakewell & Eyam Community Transport , Peak District National Park Authority, private sector, Northern Rail, Visit Peak District, National Trust	Research into route options complete by Sept 2012; Potential sources of funding identified for pilot and potential partners consulted by Mar 2013
1.3	1.3 Encourage people to reduce their environmental impact through the choices they make about: travel to and within the area, their purchasing choices and their recreation and other activities	1.3.1 See reference to action WI 3.2 for transport element		
1.4	1.4 Champion and support the development of environmentally orientated products and services that contribute to quality and green experiences	1.4.1 Create a brand toolkit to help businesses improve their marketability through promoting a sense of place	Visit Peak District , Business Peak District, Environmental Quality Mark, National Trust	Brand toolkit available for wider consultation by Jun 2012

4.2.3 Brecon Beacons National Park

History

Brecon Beacons National Park was designated in 1957. The intention was to safeguard our beautiful, rough and dramatic landscapes, considered a priceless national asset. It is around 42 miles wide, covering approximately 1,350 square kilometres of South and Mid Wales, just west of Herefordshire, and includes parts of Powys, Carmarthenshire, Monmouthshire, Rhondda and Merthyr Tydfil.

Tourism

Each year Brecon Beacons National Park is visited by some 4.1 million people who spend around 5.1 million days¹ and £206 million during their visit (2011 figure). Three-out-of-every-four visitors make a day trip to the Park

The many tourism businesses in the National Park and the communities that rely on their income benefit greatly from these visits. The National Park Authority works closely with them to ensure that tourism brings as many benefits to the community and environment as possible whilst minimising and managing the impacts those visitors have.

Two major strategic plans shape the development and marketing of tourism in the Park:

1. Brecon Beacons Visitor Management Plan, 2013
2. Brecon Beacons Walking Tourism Strategy, 2005

The Visitor Management Plan sets out the short and medium term actions to ensure that enjoyment of the National Park by existing and new visitors can continue hand in hand with the conservation of its natural beauty and the needs of local communities and businesses. It sets out 35 separate recommendations under three high level themes for action i.e.

1. Site-based Interventions
2. Communication and Influence
3. Institutional Arrangements

Site-based interventions include:

- Distinguishing between sites capable of absorbing large visitor numbers and environmentally-pressured sites and routes in need of protection, path restoration and other remedial measures
- Imposing tighter control on unsuitable activities on unenclosed land
- Improving experiences and facilities in villages through the provision of toilets and places to purchase food and drink during the day
- Traffic management intervention at problem locations

Under Communication and Influence the Visitor Management Plan stresses the need to focus on marketing and promotion of outdoor recreation activities to ensure that consistent messages are used to provide visitors with high quality experiences that support the conservation of the National Park. Other actions include:

- Training and information dissemination on national codes of conduct
- Closer liaison with farmers and landowners, and the police, to report and take action against perpetrators of activities such as off road vehicle use
- Increased volunteering programmes and gifting schemes

While most actions will be taken on a multi-agency basis, requiring a focus on how organisations work together and how projects are planned and delivered, the Visitor Management Plan stresses the need for strategic leadership to ensure its coordinated delivery. The advocacy role needs to be implemented as a shared endeavour between conservation, tourism and community interests. This will involve continuing and new levels of engagement with communities in the National Park (including through Rural Alliances and Community Council Clusters) and in neighbouring areas (through the Valleys Regional Park and local inclusion initiatives) and with farmers and landowners (through regular meetings with the National Park Authority and other agencies). Closer co-ordination will be needed between the National Park Authority and its partners and also between the Directorates of the Authority itself.

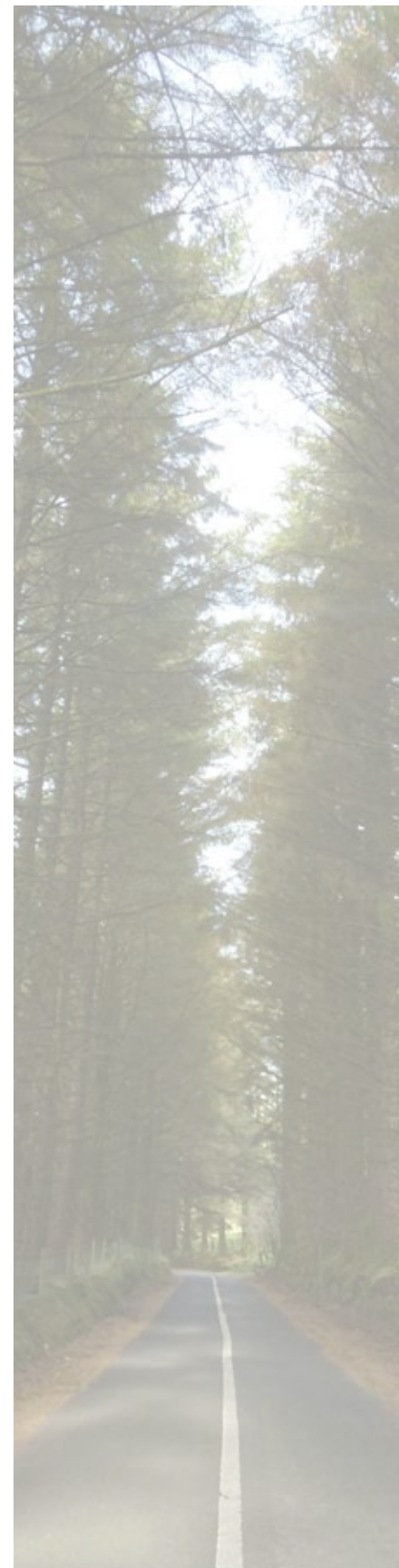


Walking – defined as “holiday and day visits where recreational walking is a significant part of the visit (source: Wales Walking Tourism Strategy, Wales Tourist Board) - provides 50% of the tourism income in the Brecon Beacons. The Brecon Beacons Walking Tourism Strategy² identifies three main types of visit that fall within this definition:

- Walking holidays – holidays and short breaks where walking is the main purpose of the holiday.

¹ Brecon Beacons Visitor Management Plan, September 2013. <http://www.beacons-npa.gov.uk/the-authority/working-in-partnership/tourism-new/visitor-management-plan-draft>

² Brecon Beacons Walking Tourism Strategy, 2005. <http://www.beacons-npa.gov.uk/the-authority/working-in-partnership/tourism-industry/pdfs-for-tourism-partnership/bbwtsfinal.pdf>





- Holiday walking – where walking is an important part of a holiday (although not the main purpose) and where good walking country is an important factor in holiday destination choice.
- Walking day visits – day visits where walking is the main purpose of the visit.

The key findings of the Park's Walking Tourism Strategy that have relevance to the study area:

- The importance of walking in attracting visitors to the Brecon Beacons National Park is well recognised amongst tourism enterprises
- Walking in general is significant to all ages and lifecycle groups, appealing to young and old alike
- Walking is relatively up-market with two thirds from ABC1 socio-economic groups
- Holidays associated with walking appeal particularly to couples and to those aged 45-64
- Important segments for holidays associated with walking in Wales are affluent retired, affluent working empty nesters, low income /no family
- Young professionals may also offer good prospects
- Walking (more than 2 miles (3.2km)) is marginally more important amongst long holiday takers (37% participate) than short holiday takers (22%), both as an activity and as a purpose of visit
- Most walking holidays are DIY holidays, where people have arranged their own accommodation, planned their own routes and made their own travel arrangements. These walking holidays are fairly equally spread across long walking holidays and short breaks
- Packaged walking holidays appeal primarily to singles or couples and are most popular with the 45 – 54 age group

- Walking holidays are slightly less seasonal than general holidays, and particularly popular in June and September
- There is a need to align the presentation of the walking product of the Brecon Beacons National Park with the identified interests of those who wish to make visits there that are associated with walking

National Park Authority

The Park is administered by the Brecon Beacon National Park Authority (BBNPA) made up of 24 members i.e. 16 councillors appointed by local authorities with land in the National Park, and 8 members appointed by the Welsh Government with experience or specialist knowledge of a particular area, such as environment, tourism, farming or community work. It has 130 staff and a number of volunteers.

The remit of the BBNPA is:

- to protect the natural beauty of the Park;
- to help visitors enjoy and understand it; and
- to foster the wellbeing of local people.

Its aims are:

- to achieve widespread understanding and support for the National Park as a protected landscape, which will be recognised as a valued local, national and international asset.

While its vision is that:

- the Park's landscape is managed sustainably with widespread appreciation of its special qualities and where local communities benefit from its designation.

The BBNPA's administrative area covers parts of 9 of Unitary Authorities. It serves as the planning authority, while the Unitary Authorities retain responsibility for all other local government services within their areas of the Park. The BBNPA's business is conducted in accordance with a number of regulations and protocols.

All National Parks are funded from central government, not from the people who live there. In Wales and Scotland the money is allocated by the Welsh and Scottish Governments.



Table 21:

Authority	2010-11	2011-12	2012-13	2013-14*
Brecon Beacons	3,302,269	3,215,500	3,402,253	3,387,834
Broads	4,229,502	4,002,149	3,774,799	3,547,447
Cairngorms	4,946,000	4,756,000	4,646,000	TBC
Dartmoor	4,739,642	4,484,867	4,230,095	3,975,321
Exmoor	3,978,580	3,764,715	3,550,853	3,336,989
Lake District	6,921,279	6,549,233	6,177,190	5,805,144
Loch Lomond & The Trossachs	7,122,000	6,768,000	6,648,000	6,499,987
New Forest	4,028,096	3,811,570	3,595,046	3,378,520
North York Moors	5,428,266	5,136,475	4,844,687	4,552,897
Northumberland	3,311,334	3,133,337	2,955,341	2,777,344
Peak District	8,298,814	7,852,720	7,406,630	6,960,536
Pembrokeshire Coast	3,462,640	3,368,100	3,554,853	3,540,433
Snowdonia	4,435,091	4,316,400	4,503,153	4,488,733
South Downs	7,290,000	11,373,133	10,981,271	10,589,405
Yorkshire Dales	5,398,563	5,108,369	4,818,178	4,527,984

* Figures for 2013-14 are forecasts

Partnerships, Alliances and Other Organisations

The Brecon Beacons Sustainable Destination Partnership (the Partnership) coordinates and plans the tourism development work undertaken by its members within the direction given by the agreed Sustainable Tourism Strategy. All the key stakeholders in tourism are represented on the Partnership including Local Authorities, Tourism Associations and Regional Tourism Partnerships covering the National Park area; together with a wide number of voluntary, community and environmental organisations connected with tourism. In total there are 34 organisations involved incorporating 40 individuals.

RURAL ALLIANCES is a sustainable tourism project within the Brecon Beacons. It is funded under the Interreg IVB North West Europe programme. The project contributes to a more cohesive EU Society as it derives from a cooperation of people from different countries working on common issues that touch the lives of EU-citizens. It involves innovative approaches to

- Distinguish and improve your business
- Be part of an active and really interesting community
- Create new and better prospects for people to work and live in rural areas
- Gain a reputation for being a fun and friendly place to visit and stay
- Improve and safeguard essential services

There are 12 partners in Rural Alliances from France, Ireland, Belgium, Netherlands and Germany as well as two from Wales, BBNPA and Trinity St David's University. The BBNPA is the Lead Partner for this project.

The Brecon Beacons Park Society (the Society) is a registered charity, consisting of a Chairman, Vice Chairman, Secretary and Treasurer. Its Executive Committee consists of the Officers plus up to eleven other members of the Society. Membership is open to anyone over the age of 18.

The Society's aims are:

- To advance the enhancement, protection and conservation of the countryside and other amenities of the Brecon Beacons National Park for the benefit of the public.
- To advance the education of the public in the ways in which to achieve the above, including the provision of opportunities for healthy recreation and in particular walking.

The Society works with the BBNPA:

1. On issues of importance within the National Park, through its membership on the BBNPA's Advisory Committees.
2. To obtain "dark skies" status for the National Park, the objective being to combat the growing encroachment of light pollution into the Park and the surrounding area, mitigate the adverse effects of this pollution, and raise awareness and understanding of this special quality of the Brecon Beacons National Park.

The Brecon Beacons Trust (the Trust) is a charitable company established to help people, communities and voluntary organisations achieve positive environmental conservation and enhancement within the Brecon Beacons National Park so as to contribute to the overall quality of life for people who live, work in or visit the Park. **The Trust was established in 2009 with initial funding from the National Grid.** To date the Trust has awarded some £500,000 to support projects furthering these objectives within the Park.

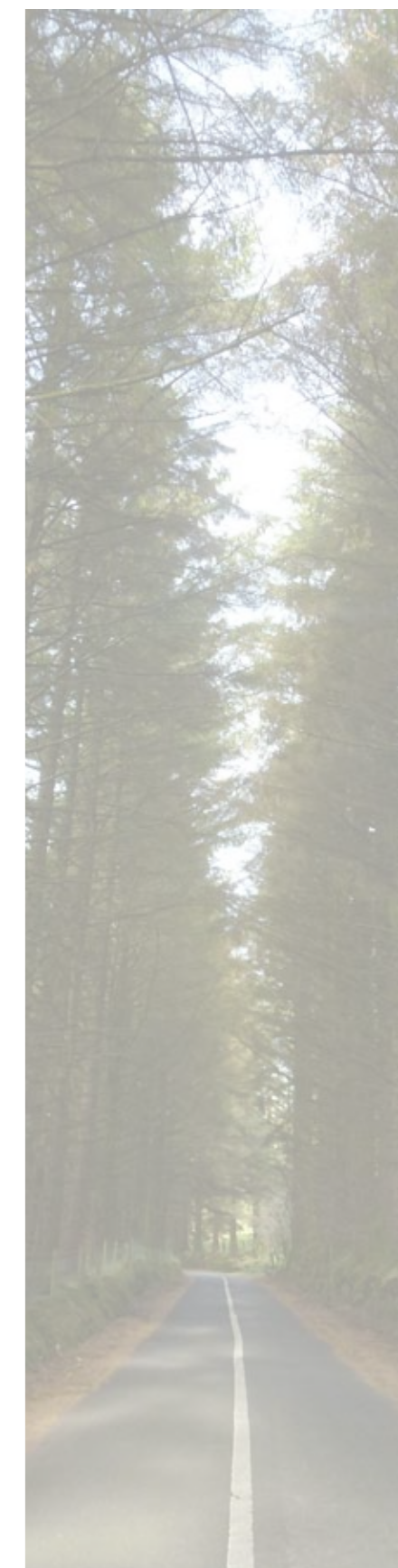
References:

<http://www.breconbeacons.org/>

<http://www.beacons-npa.gov.uk/>

www.breconbeaconsparkociety.org/

<http://www.breconbeaconstrust.org/>





4.3 USA – Eastern South Carolina Heritage Region (ESCHR)

History

Between 2008 and 2010 8 regional tourism product development plans were prepared by the South Carolina State Department of Parks, Recreation and Tourism (SCPRT). Each of the regional plans:

1. had a distinctive brand theme that reflected its own attributes and complemented those of the other 7 regions, and
2. involved multiple counties and local administrations.

Consensus was achieved through a series of public meetings, media features, and extensive stakeholder consultations (i.e. public and private sectors). The regional brands are integrated under the umbrella statewide marketing of the SCPRT. The 8 regional themes are:

Upstate: outdoor activities related to the mountains and rivers, along with cultural heritage – Cherokee native Americans, moonshine/bootlegging

Central: capital city centre for the arts

Pee Dee: agricultural (historical tobacco and green beans centres of production) and small town cultural heritage

Catawba: native American and settler heritage, focussed on the Catawba river and expressed in the Catawba Indian reservation and small towns

Scenic Savannah: equestrian activities centered on Aiken, and river activities on the Savannah

Charleston: historic centre as the entry point into the US for African slaves

Grand Strand: large scale traditional beach resort and golfing area (Myrtle Beach), coupled with tours and activities in the hinterland along the interstate waterway

Lowcountry: up market resort area of Hilton Head, and ecotourism in the low lying inland river and swamp areas

TDI probed progress in meeting the primary objective of the plans to create a coordinated collaborative approach to tourism development with the rural areas linking closely with those of the established tourism areas within the region in order to broaden the appeal to tourism markets in line with the development and brand theme and thereby spread the socio-economic benefits from tourism across all communities in the region. Approaches were made to two regions characterised by an important centre for tourist activity and rural areas with significant natural and cultural heritage resources where little tourism development had taken place to the time of the studies, namely the Upstate and the Pee Dee regions.

Upstate

Greenville was envisaged in the regional plan as the hub with five county administrations incorporated – theme: outdoors nature and activities, with cultural heritage related to the Cherokee native Americans as a sub-theme.

Feedback:

- Initial interest but lack of day-to-day leadership keeps it from advancing
- SCPRT support fluctuates: main problem is lack of investment in State Park assets in the Upstate region that is necessary to attract out-of-state visitors
- Hub destination of Greenville becoming more successful with no significant dispersal of visitors to other parts

Cause: lack of leadership, finance, genuine product that is marketable, commitment of neighbouring partners to come together for common good

Pee Dee

Interstate 95 runs through the region taking travellers from the north east and mid west to Florida in the south, with a significant number diverting off it at Florence to the Myrtle Beach region on SC coast. In essence, though Florence is a strong transit point, the region is principally a pass through area, the inherent problem being to get travellers to break their journey in the area.

Themes: no outstanding single theme but a mix of agriculture, arts and architecture, African American heritage, culinary, motorsports (Darlington Raceway) and military history based on the swamp exploits of US forces against the British in the War of Independence.

Feedback:

- Eastern SC Heritage Region established as a pilot for the State
- Well supported by the counties and municipalities, linking both the Pee Dee and the neighbouring coastal region of the Grand Strand
- Enables the rural areas of the Pee Dee to be promoted in the high tourist traffic region around Myrtle Beach (14 million tourists a year)
- Interpretive panels paid for by counties and municipalities, SCPRT assisted with matching funds and support for it as a Statewide pilot project, Florence CVB meeting rest of costs



Eastern SC Heritage Region

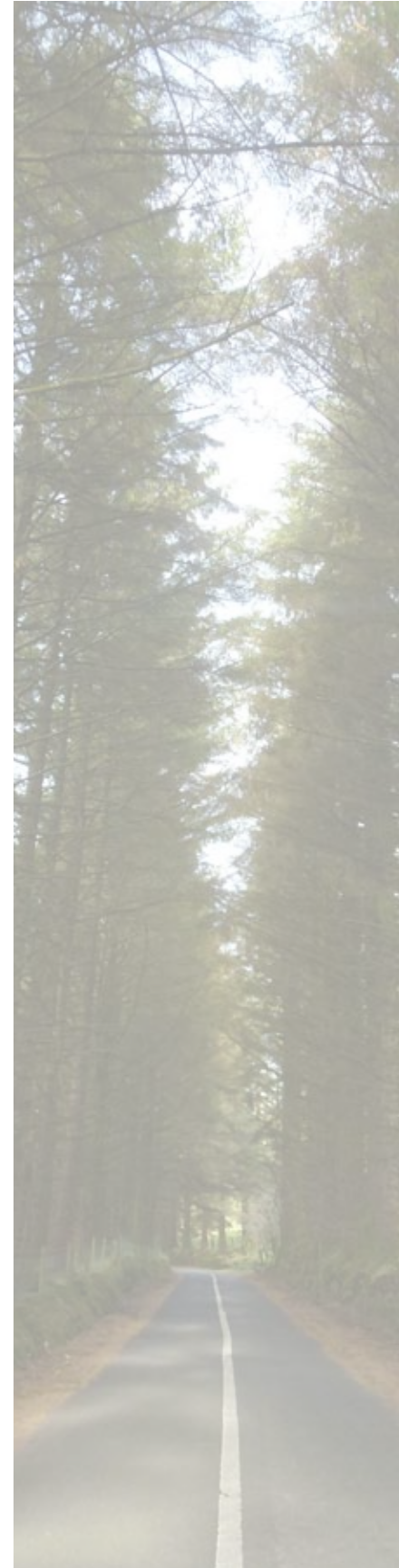
The Eastern South Carolina Heritage Region (ESCHR) was established, with the encouragement of the SCPRT, through dialogue between the steering committees of the Pee Dee and Grand Strand regional development plans and aims to unify the low and high tourist volume areas in recognition of the trend towards beach PLUS holidays whereby visitors want more than spending their time on the beach. The ESCHR promotes the more rural areas in the high tourism traffic region of Myrtle Beach. The themes are agriculture, arts and architecture, African American heritage, culinary, nature, military history, and motorsports. Launched in spring 2013, with strong support from the counties and municipalities, progress has been steady though there are no economic impact figures yet.

A coordinator is in place recruited from the Pee Dee Land Trust with extensive experience of the region and its resources. SCPRT has met part of the Coordinator's salary. The ESCHR works particularly closely with the Florence Convention and Visitors Bureau (CVB) which has taken on all other costs apart from interpretative panels at certified sites that are met by the local administrations. The Florence CVB has contracted former SCPRT personnel to develop the ESCHR programme, currently involving 65 certified sites and over 200 other sites that participate in promotion etc (i.e. restaurants, antique shops etc). SCPRT and the State Department of Agriculture are working on a Tourism Oriented Directional Signage programme for privately-owned sites.

One of the primary reasons for both the establishment of the ESCHR and its initial set of programmes is the leadership being exercised by the its Coordinator and the Director of the Florence CVB, both strong and dedicated officers able to bring influence to bear on other key players both in the rural areas and in the Grand Strand region.

The focus of the collaboration between the ESCHR and the Myrtle Beach and Georgetown tourism entities (these being the two main collaborators in the Grand Strand region) to date has been:

- development of brochures which highlight a variety of the attractions in each of the counties - the Georgetown and Myrtle Beach tourism centers are willing to provide the brochures as a cross-marketing piece since it includes them. See most recent brochure - http://visitflo.com/pdf/eschr_brochure2013b.pdf
 - providing day trip itineraries to their group travel representatives - for optional add-ons for motorcoaches
 - placement of interpretative signage at several sites in Horry County / Myrtle Beach which provides awareness of the programme and a website for a list of all sites across the region
 - placement of smaller logo signs on the Georgetown (pre-existing) interpretative signs to note that they are also certified sites for ESCHR
 - within the various themes, focus has been on nature and military history through the creation of the two rivers in the area – the Lynches and Great Pee Dee – as “South Carolina Revolutionary Rivers”, with application made for National Recreation Trail designation
 - building cheerleaders - while the larger tourism centers' focus is on marketing the larger sites rather than on heritage tourism or preservation, ESCHR has built a relationship with the smaller sites and historic preservation interest in the Grand Strand region. These entities are willing to promote the ESCHR since they feel they can offer assistance through access to a larger tourism population.
- Conclusions from the ESCHR's initial year of operation are:
1. The greatest challenge is persuading the large tourism operators in the Grand Strand region to participate in, and support, the concept of collaboration with the ESCHR. That this has been achieved to the extent it has is a tribute to the persuasive abilities of the combined efforts of the heads of the ESCHR and the Florence CVB along with a retired former staff member of the SCPRT – three dedicated and committed professionals.
 2. The large population areas – Myrtle Beach in the Grand Strand region – and Florence – in the Pee Dee region – recognise the need to broaden and diversify their tourism offering but prefer the day trip rather than longer itineraries. The ESCHR sees this route as the way to build buy-in with a more extensive set of product/experience offerings over time.
 3. Other advantages of day trip itineraries are: they are a good fit to be offered to the significant volume of convention attendees in Myrtle Beach; and they help make the rural areas more of a draw since few single tourism sites in the ESCHR would attract tourists from their principal destination.
 4. Communication between ESCHR and the managers/owners of the approaching 300 sites is regular and active so that they feel it is worth their while to participate in the programmes.
 5. Funding is, and will remain, an issue. Half of the rural sites that have been certified by ESCHR are publicly funded and any effort by ESCHR to raise funds from local government in these poorer areas could be perceived as an intrusion on their limited resources.
 6. If additional funds were made available through the State legislature - decision awaited at time of drafting end February 2014 - for a statewide heritage programme, ESCHR would market more heavily and work with the certified sites and those close to certification to improve their visitor-readiness.
 7. The ESCHR's campaign has been assisted by the change of direction in the State's tourism marketing using the theme *Undiscovered South Carolina*.



4.4 European Example of Local Authority Cooperation: Lake Võrtsjärv Foundation³



Features and History

Lake Võrtsjärv is the largest lake in Estonia with a shoreline of 100km and an area of 270km². It is a Natura 2000 bird and nature reserve. Although the lake has attracted visitors for many years its full potential as a recreational resource had not been fully developed. The seven municipalities bordering the lake, Rannu, Rõngu, Puka, Põdrala, Tarvastu, Viiratsi and Kolga-Jaani, recognised the development of Lake Võrtsjärv as a common resource was in their joint interests and actively co-operate in the development of tourism and recreation.

³ www.vortsjarv.ee

The Lake Võrtsjärv region is made up of seven communes bordering on the lake. The communes are situated on the territory of three different counties: Rannu and Rõngu communes in Tartu County; Puka and Põdrala communes in Valga County, and Tarvastu, Viiratsi and Kolga-Jaani communes in Viljandi County. The above-mentioned communes are the subjects of the development of the Lake Võrtsjärv region. The decisions of their governments are crucial to the future of the region. The communes are united by their location in the immediate vicinity of the lake and the traditions of cooperation. See details of Partners and Supporters below.

The Võrtsjärv region has three major strengths. First of all, Võrtsjärv is itself a unique natural resource, being a Natura 2000 bird and nature reserve area and home to hundreds of plant and animal species of interest. Second, Kaljuvee highlights the region's rich historical and cultural tradition and sustainability of these traditions. And third, high-quality and multifaceted tourist packages are available, which were developed as a result of effective cooperation between all parties in the region – rural municipalities, non-profit associations and local firms in the tourism sector.

The Võrtsjärv region is home to ancient fishing villages, and has a historical fishing vessel endemic to the region – the kalepurjekas. The lake, which is rich in eel, carp bream and pike-perch, also features Estonia's only freshwater fish museum. There is also a vernacular bagpipe tradition which dates back many centuries. Tourists can get the best preview of the sights and activities in the Võrtsjärv region online at www.vortsjarv.ee or on location at the Võrtsjärv visitor centre in at Jõesuu – at the mouth of the Suur Emajõgi.

Lake Võrtsjärv Foundation

The above-mentioned local governments established the The Lake Võrtsjärv Foundation to develop and implement the Lake Võrtsjärv Development Plan 2000-2005 for the joint development of the Region. The key aim was to balance tourism development with protection of the environment. The Foundation manages the lake's development; jointly funded by the seven municipalities and via grants sought from national and international aid funds.

The wider aims of the Foundation are:

- Raising the environmental awareness of the public
- Developing unified views on the balanced development of the Lake Võrtsjärv region
- Preserving and protecting Lake Võrtsjärv as a sensitive body of water, and
- Promoting the image of Lake Võrtsjärv as a rapidly developing recreational region both in Estonia and beyond.

The Foundation has 2 board members and an executive director. There are also 7 council members – one from each of the local authorities, elected on a 4 year cycle. Paid staff include a manager (also on a 4-year contract), a Visitor Centre manager (8 months a year), and an information specialist from May to September.

The Development Plan introduced the concept of five 'Võrtsjärv Gates' in different lake areas. These visitor centres and recreational areas, operating as a network of regional tourism destinations with different attractions, are connected by a cycle track and include landing stages to facilitate movement around the lake. Construction of the 'Võrtsjärv Gates' began in 2005-2006 with a €187,000 grant from the European Regional Development Fund (ERDF).

The Lake Võrtsjärv Visitors Centre, built in 2009, was funded by the EU Structural funds, the EU LEADER programme and the seven municipalities and is administered by Lake Võrtsjärv Foundation. The Visitor Centre by the lake at Jõesuu provides information about the lake's biodiversity, recreation and tourism. It is possible to book different tourism services and to lease the building for training courses and seminars. Smaller information centres are open during the summer season at Valma Village and Pikasilla recreational area. Several annual events have been initiated by the Foundation e.g. fish and handicraft market in early June at Jõesuu, Võrtsjärve biking tour at end July, Tondisaare folk dance fest.

The Foundation also organises training programmes for tourism entrepreneurs, as well as collecting and disseminating market information and visitor feedback to operators in the area.

The Lake Võrtsjärv Foundation has been successful in attracting a range of funding including a €874,000 grant from EU structural funds for the Development of the Gates of Lake Võrtsjärv, Stage II (2008-2010). This project included further development of the recreational areas, bicycle path signage and production of related maps.

Achievements

It won the 2010 Estonia's Hidden Treasures aquatic tourism award, on the grounds of its strong, diverse tourist products, well-functioning cooperative networks, and preservation of rich traditions.

In presenting the award, Estonian Tourist Board Marje Braunbrück said that the strength of the Võrtsjärv region was its very well-organized cooperation network, which spans the entire region and is expressed in real terms in municipal development plans and investments into tourism.

"As a result of the investments, Võrtsjärv today has five primary gateways, all of which are tourist destinations in their own right."

She also emphasized the diversity of the tourist products of the Võrtsjärv region and the fact that they are orientated to people with different interests. "Võrtsjärv offers recreational opportunities for people seeking cultural, nature and active holidays and its tourist products succeed in uniting history and the present-day in superb fashion," said Braunbrück.

In 2010 Lake Võrtsjärv won the best EDEN (European Destination of Excellence) award in Estonia for aquatic tourism. The judges highlighted the strong and diverse tourism products, well functioning cooperative networks and preservation of cultural traditions. The range of tourist packages, which are of interest to visitors seeking cultural, nature and active holidays, were developed with input from the local municipalities, non-profit associations and local private sector tourist firms.

Funding

The participating local authorities each contribute an annual fee – five paying Euros 5,750, and two Euros 3,450, making a total local authority contribution of Euros 35,650. The Foundation itself derives income from the sale of products and services (e.g. rental of seminar rooms, training programme/workshop fees, canoe and boat rental, sales of souvenirs, drinks and snacks) generating approximately Euros 15,000 to 20,000 a year.

At least half the Foundation's income comes from the EU or state programmes through different development projects.

- Between 2010 and 2013, the European Fisheries Fund (FLAG) supported the Foundation to the tune of Euros 15,000 to 20,000 a year
- Between 2009 and 2013 the Foundation was a partner in a project supported by the Interregi IV A programme. The COMCOT programme – an innovative tool for improving the competitiveness of community-based tourism – was led in Estonia by the Estonian University of Life Sciences, with the Foundation's share being around Euros 50,000
- European Regional Development Fund – between 2008 and 2010 large scale investments were made totalling Euros 1,022,500
- EU Leader programme – around Euros 10,000 each year between 2009 and 2013
- National projects supported by the Environmental Investment Centre, Enterprise Estonia – though there have been no project support over the past 3 years

The Foundation advises that where projects involving co-financing are beyond its financial resources, local authorities step in, with the municipality directly benefitting from the investment contributing the most.

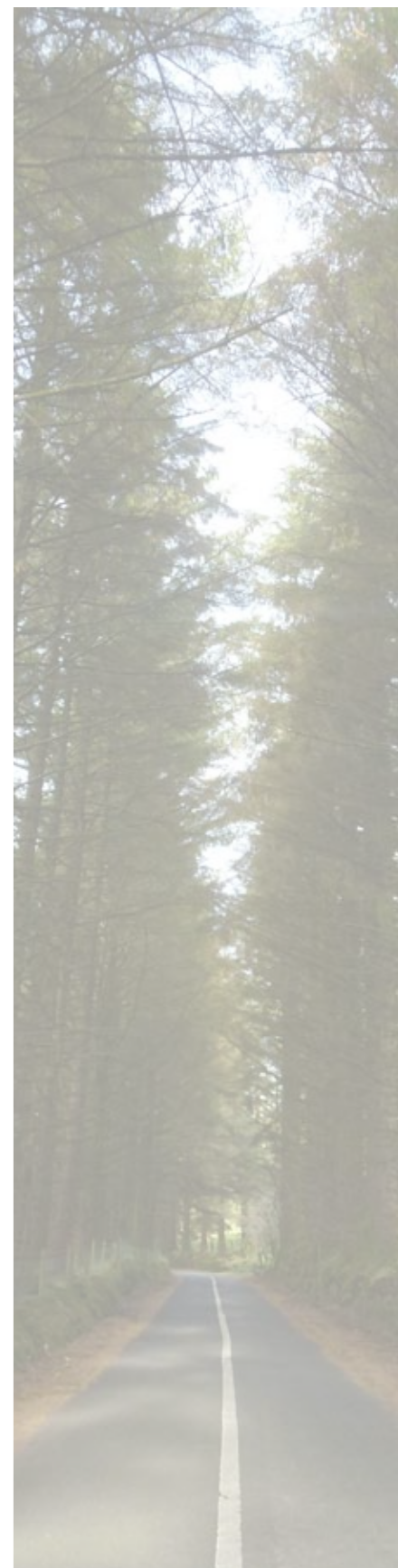
The Foundation claims to be confident that it has sufficient streams of finance to continue with the implementation of the Development Plan, even after the discontinuation of the EU Leader programme since, to quote its Director's words "Leader programme support to our organization has not been the only, or critical, support to us".

Success Factors

The redevelopment of Lake Võrtsjärv is a good example of collaboration between different local authorities in pursuit of a common goal.

Key aspects of the organisation that make the Foundation successful are:

1. joint vision and strategies for whole region
2. sustainable work of local authorities and willingness to support foundation annually
3. cooperation with local entrepreneurs and local people
4. monitoring our activities to answer better to the expectations of visitors
5. cooperation with other tourism organizations to be "on picture" and visible also on international level through the Estonian Enterprise Tourism Agency, the South-Estonian Tourism Foundation, the Living Lakes network, and the EDEN network.



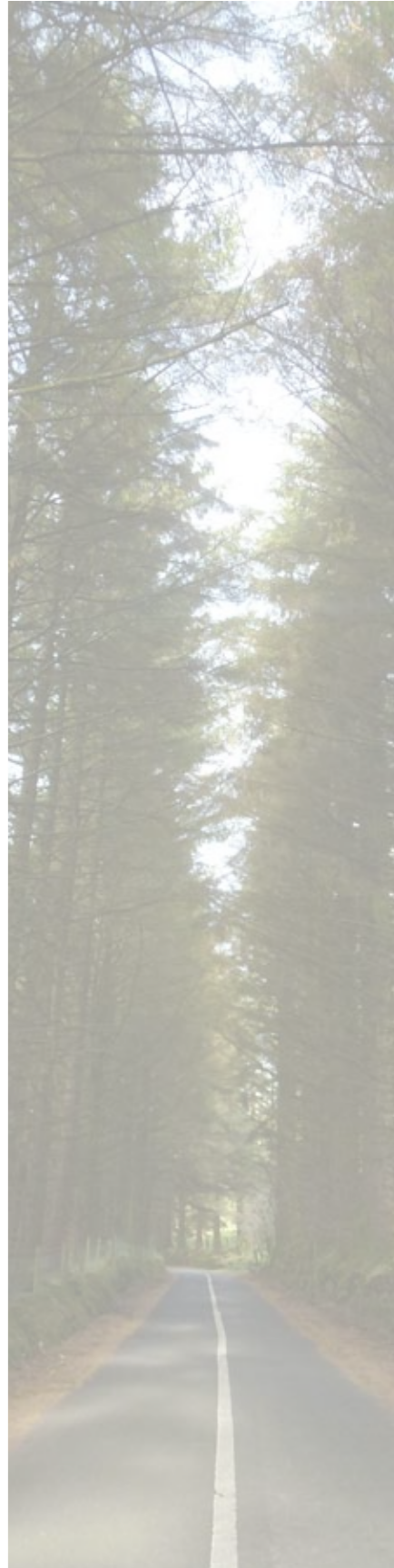
Partners and Supporters

- Tartu County and its Rural Municipalities of Rannu and Rongu
- Valga County and its Rural Municipalities of Puka and Podrala; and Viljandi County and its Rural Municipalities of Tarvastu, Viiratsi and Kolga-Jani
- Estonian Fund for Nature
- Estonian Historic Ship Society
- Region Dalarma (Sweden)
- Centre for Limnology (Estonian University of Life Sciences)
- Ministry of the Environment
- Estonian Ecotourism Association
- Global nature Fund
- Peipsi Center for Transboundary Cooperation
- Tartu Tourist Information Centre
- Tartu Tourist Information Centre
- Võrtsjärv Fisheries Development Agency
- Estonian Handicraft Online Shop



Part 2:

Vision, Opportunities and Action Plan



CHAPTER 5: VISION, BRAND PROPOSITION AND STRATEGY

5.1 The Imperatives

5.1.1 Market: Product Matching

Products and markets should be mirror images of each other. Products should only be developed if there is evidence of demand, with the scale and phasing of development related to the size and growth rate anticipated in market demand. The standard approach to tourism product development planning for a destination involves the preparation of a comprehensive assessment of the overall situation (i.e. administrative, economic, socio-cultural) and an audit/inventory of tourism resources and assets – natural, cultural and historical – and existing products. Combined with a SWOT analysis (see section 3.10.) this enables a comprehensive assessment and understanding of the present situation to be developed. The process of planning involves the marketing planner gathering information regarding the expectations of the possible target markets and segments which are then used to develop appropriate products and services in the destination.

Many destinations both in Ireland and elsewhere around the world have a wealth of natural and cultural resources with the potential to meet the needs and expectations of many tourist market sources and segments. However, these resources have not been developed to attract and cater for their market potential. These destinations do not have weak potential; it is a case for the resources and attributes of the destination to be developed into a set of cohesive and dynamic tourism products. Such developments must, however, be market need/interest-based and in fulfilment of an integrated market: product development strategy.

5.1.2 Integrated Development and Marketing Approach

The European Travel Commission/UN World Tourism Organization Handbook on Tourism Product Development¹ identifies a series of reasons why comprehensive, integrated and inclusive planning for the tourism sector is vital. Tourism represents a temporary addition to the permanent population of the areas where it takes place creating extra pressure on the resources, facilities and amenities serving local residents along with additional needs for specific facilities such as places to stay. Given these characteristics, government planning and management is necessary. As a sector undertaken by the private sector and involving direct contact with the local population, tourism thus has a triumvirate of interests – government, private sector and community.

The complexity of tourism planning requires the process to be conceptualised to incorporate the tourism system of demand, supply and distribution, values (of the host community and visitors), stakeholder relationships, definition of planning goals and parameters, the issues of scale, and the means by which development is dealt with in terms of concerns over sustainability. All travel and tourism operators are subject to market conditions and standards of operation of other businesses which supply to, or purchase from, the operator in question. All tourism businesses are inter-linked in one way or another.

These considerations apply fully in the case of planning for the four mountain ranges spread across four county administrations in the study area. The situation is made especially complex by the fact that multiple authorities are involved at national, county and municipal levels. Coordination between all these parties is vital so that there are no weak links in the chain of planning, development, operation, management and marketing. Each group of stakeholders need to be involved in the planning consultation with their ideas and needs fully incorporated in the conceptualisation of the development plan and their respective roles determined in its implementation

¹ Handbook on Tourism Product Development, 2011. European Travel Commission/UN World Tourism Organization

The four mountain ranges have attributes and current and potential attractions to cater for a range of markets and segments – and to develop and market these in a way that is complementary and inter-dependent. The towns and villages and their communities across the study area have their own needs and each of the mountain ranges falls under different county administrations. The mountain areas cannot gain maximum benefit for their respective stakeholders if developed, operated and marketed in isolation from each other. As detailed in chapter 7, a multi-stakeholder Development Partnership is proposed for the study area. This body will need to ensure that the counties work closely together with full integration and collaboration in planning activities, facilities, events and their marketing. They will also need to coordinate their activities to the maximum extent possible with the national agencies tourism and recreational development and marketing agencies.



5.2 Product Development Vision and Strategy

In the five months of the study, TDI has maintained regular contact with the Steering Committee in developing and undertaking an extensive programme of research and analysis comprising:

- a series of site visits to all parts of the study, amounting to 60 mandays,
- discussions with national tourism agencies and a full range of public and private sector stakeholders, as well as with community groups, amounting to a total of 60 personal interviews and group meetings,
- studies of over a dozen other areas in Ireland, the UK, the rest of Europe, North America and New Zealand with a similar mixture of outstanding natural resources situated in rural and small town communities between major centres of population,
- identification of the principal attributes of the study area that can be featured in a branding proposition to attract recreationists and tourists from various sources, and
- testing the branding proposition with 30 tour operators.

The concept as outlined in the Tender Document was to ascertain whether, and to what extent, the formation of a singular proposition umbrella brand and inter-county collaborative structure for the four mountain ranges (and the associated valleys and coastline within the overall area) would generate both economic and social benefits for the populations of the towns, villages and rural areas of the broad region. In essence, would developing recreational and tourist features and activities on a cooperative, coordinated basis be more productive than going it alone?

Developing answers to this question, and substantiating the case for it, was the central focus of the wide-ranging programme of investigations conducted by TDI. In drawing together the results of the research and analysis undertaken, TDI is guided by the vision statement presented in the Consultant's Brief, i.e.:

'The primary vision for the 'Munster Peaks' is the development of a coherent, unambiguous and market-ready branded tourism destination of singularity and scale that will significantly increase the future tourism performance of the area.'

With minor modification, TDI believes this can constitute the basis for the vision statement for the study area. The modifications proposed are in respect of:

1. the name for the study area, and
2. the need to incorporate reference to the area's principal appeal to visitors, namely active recreation, in the vision statement.

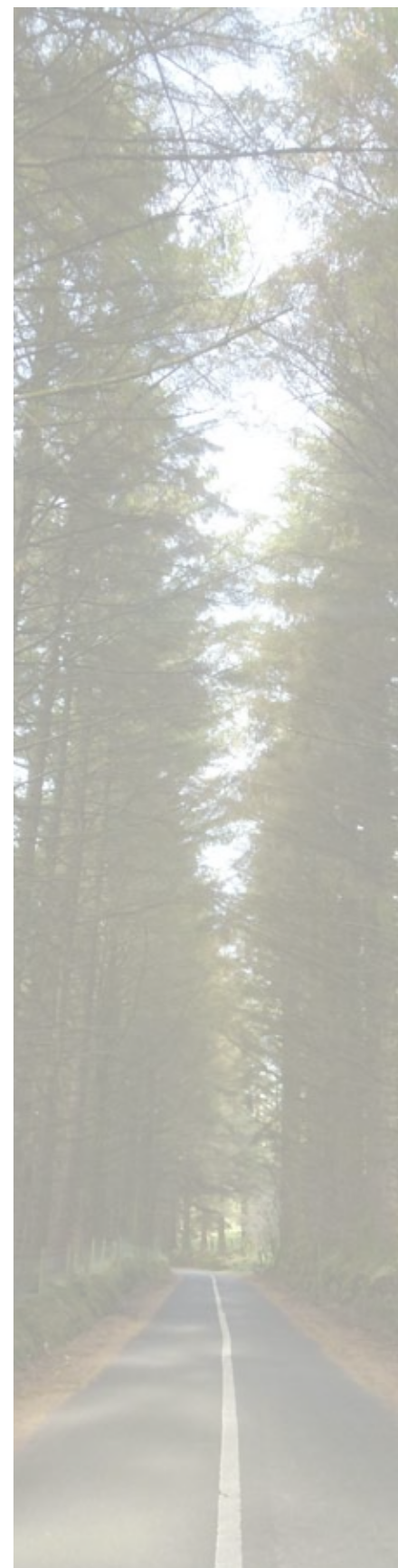
Name of the Study Area

There is a dilemma concerning use of the geographic locator "Munster". On one hand, it is the most precise name for the geographic area encompassed in the study (though other parts of the Province are not included); while, on the other hand, the use of "Munster" is not perceived by the international travel trade as a significantly positive hook for the area because of its association with a television comedy series.

A second issue concerns the use of the word "peaks". This term is widely understood in tourist markets to mean snow-covered mountains which could result in visitor dissatisfaction with the expected environment.

TDI believes that the name for the area to be used in marketing communications should be both:

- clearly identifiable to the study area, and
- have a resonance that appeals to prospective visitors.





Identifying an accurate yet distinctive and unambiguous geographic locator component of the brand name with market appeal is highly problematic. Clearly the most accurate single word is Munster reflecting the region in which the study area falls. Though the use of **“Southern”** is somewhat vague and there are other mountain areas in the south additional to those of the study area that could claim this geographic designation (as with “Munster”), it remains a valid term to use. That said, final determination of the geographic locator should be determined by the communities of the region itself since it is the term through which their home region will be known.

In Edmund Spenser’s epic poem *The Faerie Queen*, reference is made to the gods sitting in the mist atop the Galtees with the term “great hills”. Use of the word **“Great”** can therefore be justified and gives a valid link to the historical and cultural heritage of the study area incorporating its important intangible assets.

The study area is dominated by the four mountain ranges so while much of the recreational and tourist activity takes place in the lowland areas, on and along the waterways and coastline and in the towns and villages, it is the mountain element that represents the area’s key identifier. For that reason a word denoting this feature is needed and given the difficult connotation of “peaks”, referred to above, and the relative weakness in tourists’ perception of the word “hills”, it is considered that **“mountains”** should be the descriptor incorporated in the study area title.

The significance of walking, biking and, to a lesser extent, other activity pursuits needs to be adequately reflected through the use of a word that denotes that the study area is a major centre of excellence for these many forms of recreational activity. At the same time, it is vital in respect of gaining acceptance among international tour operators that the different county and local administrations should be seen to be developing products and experiences and marketing them on a combined, integrated basis. The use of the word **“park”**, with its definition as *‘a large public garden or area of land used for recreation’*,² can meet both the requirements of recreational activity association and coordinated, collaborative strategies and plans across multiple administrations.

² www.oxforddictionaries.com

TDI has taken cognisance of the reported common interpretation of “park” in Ireland as constituting an area subject to a series of usage restrictions, but we propose its use both because:

1. it is a term that is widely accepted in international markets as denoting an area where the encouragement of recreational activities is fully compatible with the preservation and protection of its natural features (e.g. as in the national parks of the UK and USA), and
2. the lack of a suitably strong alternative (e.g. “district” as in the Lake District is not a term used in Ireland while “area” and “region” are too broad failing to denote the possibility of recreational and tourist attractions and activities).

The options to be considered for the name of the study area are suggested as follows:

1. Great Southern Mountain Park
2. Great Munster Mountain Park

Given the importance of the international tourist market for the future economic benefits to the study area, TDI proposes that it should be known as:

GREAT SOUTHERN MOUNTAIN PARK

The distinguishing aspect of the study area from other rural areas in Ireland with strong natural features and cultural heritage, where vestiges of a traditional lifestyle and values remain, is the abundance of opportunities afforded by the mountains, lowland areas, inland waterways and coast for outdoor pursuits – both activities and adventure pursuits of differing degrees of physical arduousness i.e. “soft” and “hard” recreation. This quality represents a significant **competitive strength** and needs to be a central part of the vision statement.

At the same time, for many prospective visitors in the “sightseeing and cultural heritage” segment the attraction of the study area is the fact that outdoor activities can be **combined** with visits to the area’s towns and villages; involving visits to the wide range of **nationally significant built** heritage, interaction with residents and exposure to their way of life, away from the urban hustle and bustle in which many such potential visitors spend their lives. This is a second aspect on which the study area has a clear **competitive strength**.

It is this combination of natural and cultural heritage, manifested through the diverse range of outdoor activities possible, exposure to the history of the area, and interaction with its people that creates the **competitive advantage** of the Great Southern Mountain Park; and should drive the proposition for it as a coherent and cohesive region for recreational and other visitors from overseas and within Ireland.

Promotion of the area can be as a zone of recreational excellence targeted at:

- Visitors seeking hard & soft adventure activities
- Sightseers & Culture Seekers (Culturally Curious) looking to combine soft/ hard adventure activity with heritage-related activity.

The focus on the first market will underpin the area’s originality, while the attraction of the latter will generate the most local economic benefit. Both these aspects should be reflected in the vision statement.

Proposed vision statement

Taking account of the forgoing explanation, it is proposed that the appropriate vision statement for the study area should be:

‘The guiding vision for the ‘Great Southern Mountain Park’ is the development of a coherent, differentiated and cohesive destination offering a diverse range of outdoor recreational activities, and living and built cultural heritage, a combination that will bring significant socio-economic benefits to the people of the area.’

Development and promotion of this area as a single destination will:

- seek to **conserve, enhance and interpret** the natural, built and cultural environment of the area,
- provide a range of **enhanced recreational opportunities and experiences** for local people and visitors,
- provide a range of opportunities for a **high quality and authentic experience** for visitors to the area,
- generate **local economic benefit**, contributing to sustainable rural regeneration,
- raise the profile of the study area as a **premier outdoor activity destination**, and
- facilitate **understanding, appreciation and protection** of the natural environment.

The development and promotion of the *Great Southern Mountain Park* as a single cohesive destination, combined with an activity and heritage enhancement programme, will drive participation in a range of activities with a focus on adventure and culture. This vision is pragmatic – the goal of this strategy is to increase visitor numbers and visitor revenue in the towns, villages and attractions within the study area supporting a **sustainable rural economy based on low-impact activity tourism**.

For the study area this means:

- **Get Out There Centres** (or Jump In! Centres) – adventure information hubs in key towns
- **Destination Gateways** – tourism and recreation hubs
- Adventure and Cultural **Product Enhancement Initiative**
- **Multi-themed Great Southern Mountain Park Driving Route** – linking attractions

The wider vision is to ensure the *Great Southern Mountain Park* as a destination is ‘fit for market’ and to encourage the tourism trade to participate in collaborative marketing initiatives.

5.3 Development and Marketing Strategy

5.3.1 Approach to Destination Branding

In developing a tourism brand proposition it is important to recognise:

1. the difference between a place brand and a destination brand,
2. the need for a destination brand of an area within a broader region or country to complement and be a key component of the destination brand for the wider geographic area, and
3. a brand is not a product, logo, slogan/strapline, imagery, design style or a marketing campaign though the brand should be embedded in them all so that they consistently reflect the destination’s brand values in all marketing communications.³

The term “place” is broader than “destination” and embraces the total economic activity and ambience of an area. It does not relate solely to tourism. Place branding and marketing are focused on influencing the decision of people to live, work, or study (as well as visit) a place, bringing with them wealth and investment.⁴

³ *Handbook on Tourism Destination Branding*. United Nations Tourism Development Organization and European Travel Commission, 2009

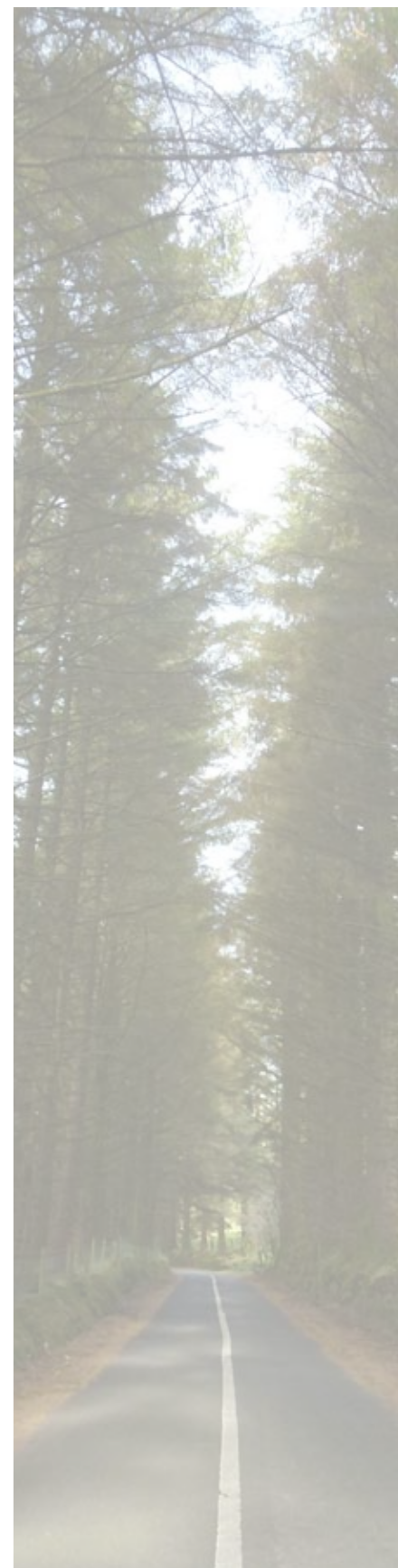
⁴ *Op cit*

5.3.2 Destination “House of Brands” and Sub-brands

The ability of a region within a country to develop a successful destination brand is a function of the perception of that country gleaned from word-of-mouth, the way it is portrayed in films, books, news reports, websites and social media, and the marketing of tourism authorities which is focused on the image of the country. The work of the national agencies in establishing market perceptions of Ireland as a country for inward investment and study – and of the tourism authorities in creating a positive image for visitors to choose to select Ireland over other destinations – determines to a significant extent the ability of the authorities and operators in the study area to develop and sustain a distinctive and appealing brand to attract visitors.

The national tourism branding and associated marketing campaigns for Ireland constitute the “house of brands” a la Disney or Ford. Under this umbrella brand, sets of sub-brands are developed based on products structured for different market segments. Clearly, there has to be synergy and a degree of consistency and compatibility between the sub-brands and the national or regional brands. The **Wild Atlantic Way** represents the umbrella brand under which the individual destination areas along the west and south-west coasts of Ireland, and associated inland areas, can develop their own tourism identities. Similarly, the ongoing Fáilte Ireland **Thematic Tourism Brand Proposition and Identity study for the East and South of Ireland**, which encompasses the study area, will establish the overarching brand identify for the region.

Given that the Failte Ireland study on the East and South of Ireland branding had not commenced at the time of TDI’s proposition development and validation, it was not possible to assess the “fit” of the proposed proposition for the study area with that being developed for the wider region. However, the fact that a detailed destination brand, based on detailed research and analysis, has been prepared for the study area, this will be welcomed by the team charged with the branding strategy for the East and South of Ireland as a valuable contribution to their work.





To achieve maximum, sustained market, the marketing and promotional strategy and activities to launch and develop the destination brand for the study area will need not only to be in line with the regional and national brands but also closely coordinated with the individual county and other local brands within the study area. The marketing for the study area as a whole will not replace individual county destination marketing efforts but support and strengthen them. Close coordination will be vital to ensure this objective is met.

It is essential that the proposition for the study area:

- is consistent and compatible with the overall branding of the country as well as the (in development) umbrella regional brand for the East and South of Ireland,
- is representative of the truth of the study area's distinctive characteristics and attributes,
- maximises the advantages that the four mountain ranges hold over competing areas, and
- is coordinated through the proposed Destination Partnership Tourism Development and Marketing Sub-Group to ensure that the overall marketing strategy and activities for the study area complement, and are compatible with, those of the component counties and other local groups.

5.3.3 Brand Building

A destination brand refers to the qualities of an area as an attractive place to visit, with the specifics related to the prospective visitor's interests coming at a later stage in the promotional funnel. A destination brand needs to communicate its "sense of place" and build an emotional link with the prospective visitor. This entails telling a story that gives an insight into the place, its people, its history, the way it views the world and how it relates to its environment – in other words making the place alive and relevant to the audience.⁵

⁵ Op cit

The brand pyramid is a simple tool that builds up a brand logically from an assessment of the destination's main strengths to a distillation of its essence. There are five stages in this process, as illustrated in the accompanying table. Applying the principles to the study area, the essence of the study area to be incorporated centrally into the brand are the characteristics of:

- Natural
- Stimulating
- Refreshing
- Community spirit
- Welcoming

Stage	Feature	Question to be answered	Great Southern Mountain Park
Rational attributes	Main assets	What do visitors like to see and do	Outdoor activities, visiting natural and built heritage sites, interacting with local people and their culture
Emotional benefits	Visitors' emotional take-out	How do visitors feel about the place	Sense of escape from normal lives stimulated by a combination of physical activity, visual beauty, historic sites and warmth of reception by communities
Brand personality	Main character traits	How would it like to be seen and described by its main audience	Ireland's premier area for outdoor activities and built and living culture
Positioning statement	Strongest competitive features	What makes it stand out from everywhere else	The combination of three major elements: ideal natural environment and terrain for outdoor recreational activities and sightseeing, long history manifested through buildings, events and stories, and communities adhering to traditional values and way-of-life
Brand essence	DNA	What is its essential nature and character	Natural, stimulating, refreshing, community spirit, welcoming

Source: TDI research based on model outlined in Handbook on Tourism Destination Branding. United Nations Tourism Development Organization and European Travel Commission, 2009

A destination's **brand positioning statement** provides the guide for its brand communications strategy. It outlines the strengths and associations that make the brand not only different but also meaningful. As such, it drives the proposition.

It is proposed to use the following brand positioning statement for the study area:

"The people of the Great Southern Mountain Park are open and friendly. They make it easy to enjoy the outdoor recreational activities, stories, music and food, whether in the mountains, along the rivers, on the coast, or in the small towns and villages. You don't just visit the Great Southern Mountain Park, you experience it in every way."

The associated **brand proposition** links closely with the positioning statement and describes what makes the brand a unique recreational and tourist destination:

“In the Great Southern Mountain Park you step into an unspoilt environment of great natural beauty and rich cultural heritage, letting you be as active or as relaxed as you want. The unique experiences you have and the people you meet will make you feel refreshed and energetic.”

The main challenge in branding is to develop a destination brand that has a rich personality and yet is complex and appealing to the target audiences. The brand personality is the set of human characteristics that are associated with a brand, including gender, age, socio-economic class as well as personality traits such as warmth and sentimentality. A brand's personality has both a head and a heart; its head refers to the logical attributes of the brand features, while the heart refers to its emotional benefits and associations. Therefore, the success of any destination brand is critically dependent on the extent to which the destination's personality interacts with the target audience on both the emotional and the rational levels.

The personality characteristics are emotionally driven and relate to how the destination presents its brand to its target audiences. In the case of the study area, with both highly active and more passive appreciators of the natural and cultural heritage of the mountains, lowlands and communities to target, the balance has to be between high energy and the time to appreciate all around them. The proposed **brand personality** should include:

“Welcoming, down-to-earth, strong values, active with a purpose, time for others”



5.4 Guidelines on use of the Great Southern Mountain Park brand

The overriding need is for all stakeholders – at national and local authority levels as well as attraction, activity and hospitality operators and the area's local communities themselves – to endorse and use the term **Great Southern Mountain Park** in describing, discussing and in all communications dealing with the tourism products and experiences available in the area. In essence, all stakeholders have to own the brand, and present a consistent, standard identity to the outside world.

Within the overarching brand of the Great Southern Mountain Park as an area of recreational activity excellence combined with rich cultural heritage experiences, individual sub-brands can be developed in line with the specific product/experience offer of the different locations e.g. walking in Waterford, mountain biking in Ballyhoura. Again the consistency and standardisation of use of the sub-brand within the umbrella Great Southern Mountain Park designation is vital.

Maintenance of the Brand Promise and Core Values

The promise of the Great Southern Mountain Park is of an unspoilt environment of great natural beauty and rich cultural heritage, in which visitors can be as active or relaxed as they want, where they will have both invigorating experiences and make new friends, and leave feeling both refreshed and enlivened. The core values are the traditions and lifestyles of the communities of the Great Southern Mountain Park based on family, a strong work ethic and respect, manifested in the warmth of reception accorded to visitors by the people of the area and the efficiency of service provided in the delivery of tourism and recreational services.

The key elements in any destination living up to its promise and delivering its claimed core values are:

- The products/experiences provided being of a type and standard in line with the expectation created,
- The people of the area embracing visitors through willing and friendly interactions, and taking service with a smile to the ultimate, and

- Destination marketing and promotion that accurately reflects the product/experience offer of the Great Southern Mountain Park in such a way that it draws visitors to the area but does not create false expectations.

Clearly, for these three elements to be delivered to the full, there are needs for;

- effective coordination and leadership in planning and developing tourism,
- education and training programmes both in tourism awareness for the population at large and for industry professionals (i.e. vocational, management), and
- well-designed, adequately-funded and effectively-delivered marketing and promotional programmes. NB The marketing and management of the brand going forward, and the communications strategy for how the visitor will engage with the product from planning right through to experience re detailed in Chapter 7

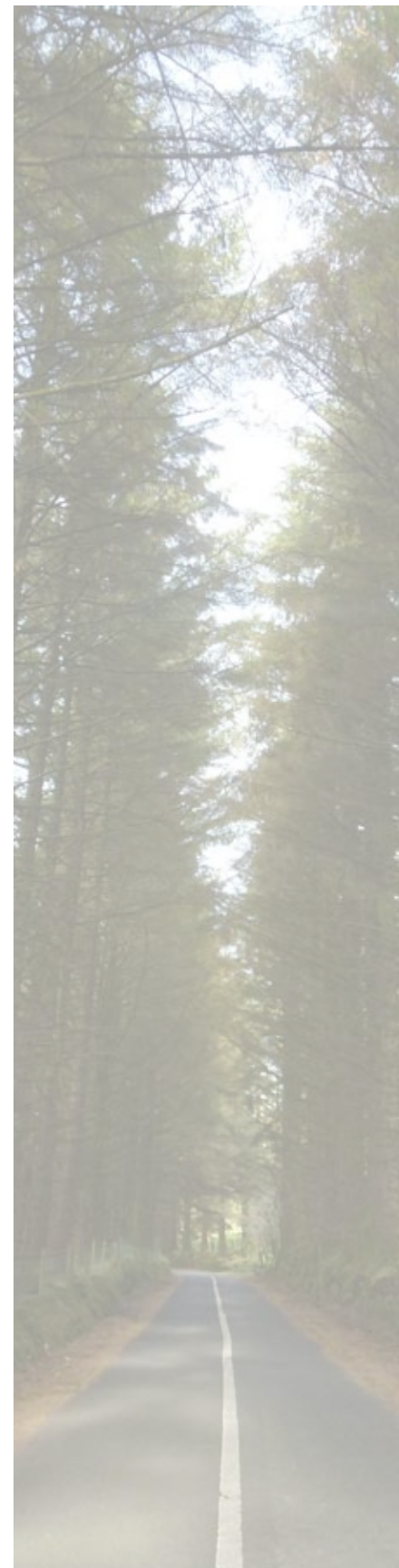
Managing Risks

The tour operator survey produced strongly positive feedback concerning the proposition of grouping the four mountain ranges under a common identity and majoring on a combination of recreational excellence combined with direct access to local culture, and the creation of sub-brands within the overall Great Southern Mountain Park brand. However, a significant minority considered realising this ambition would be highly challenging for the stakeholders of the region, while others saw the imperative for swift and substantive action.

There are five main risks – mainly in the short-medium stages – to the initiative:

Absence of strong leadership and effective coordination between all local authorities, main operators and community groups across the four mountain ranges.

This will result in the initiative having a faltering start leading to increasing scepticism both among local communities and the travel trade about the serious intent and commitment to develop the concept of the Great Southern Mountain Park as a major destination.





Inability to integrate the brand proposition for the Great Southern Mountain Park within the brand framework being developed for the Failte Ireland East and South of Ireland region.

The new branding strategy for the East and South of Ireland represents a major opportunity for the Great Southern Mountain Park to be a significant component of the overall region's tourism and recreational offering and image, thereby reducing the finance needed for its own marketing and promotional campaign by allowing the Great Southern Mountain Park to "piggyback" on, and complement, that of the wider region. If this opportunity is missed, the marketing and promotional costs of establishing and maintaining the identity of the Great Southern Mountain Park will increase.

Failure to agree and begin implementation of an integrated tourism and recreational product/experience development plan, and the marketing and communications programme to establish the identity of, and create momentum of visitation to, the Great Southern Mountain Park.

The present study is the first step in a process. The endorsement of the concept of a common identity and approach to tourism and recreation development and marketing across the four mountain ranges needs to be immediately followed by both the establishment of the necessary organisational/institutional arrangements to plan and guide implementation, and the preparation and actioning of an integrated tourism and recreational product/experience development plan in which gaps in the provision of infrastructure, attractions/activities, and hospitality provision, and manpower capability shortcomings, are identified and plans prepared to address them.

At the same time – working in concert with the national tourism agencies – a brand and marketing strategy and plan should be developed and implemented, with the goal of establishing the reputation of the Great Southern Mountain Park as a region of recreational excellence combined with rich cultural heritage. Failure to address either the development planning and marketing communications actions within the next year will result in a loss of interest and momentum among stakeholders, and lead to the area remaining largely ignored by the outside travel industry.

Inadequate funding sourced to meet the needs of the marketing and promotional activities

A key determinant in the successful establishment of the Great Southern Mountain Park as a significant tourism and recreational destination will be the ability of the proposed institutional body to raise financial contributions from European and national sources to complement contributions made by local authorities and members – if a membership scheme is introduced – to meet the costs of the necessary marketing and promotional campaigns.

If fund raising proves inadequate for the implementation of the marketing strategy, then the impact in the marketplace will necessarily be limited.

Inadequately prepared communities and insufficient supply of appropriately educated and trained personnel for tourism and recreational services

The Great Southern Mountain Park will major in its destination brand on the warmth of welcome and efficiency of service received by the visitor. If either of these aspects fails to deliver to the full, then the reputation of the area will fall. To ensure this does not occur, it is necessary for:

1. tourism awareness among local communities – from schools through to seniors groups – to be promulgated through local media and special presentation/events, where necessary and possible, and
2. vocational skills and management training programmes to be designed and delivered to produce the appropriate numbers and grades of trained personnel for the area's tourism and recreational operations.

5.5 Key Objectives

The key objectives of this development and marketing strategy are to:

- Develop the *Great Southern Mountain Park* as a major tourist attraction in its own right, increasing dwell time and driving increased expenditure on accommodation, food and recreation services contributing to a sustainable local rural economy
- Position the *Great Southern Mountain Park* as Ireland's premier adventure activity place
- Provide a focus for the cohesive development of *The Great Southern Mountain Park*
- Provide enhanced recreation opportunities for all
- Connect people, communities and countryside
- Create a set of memorable/broader tourism experiences for visitors
- Increase visitor numbers and revenue for key visitor attractions
- Maximise the potential provided by the high volume of road traffic passing through the area between Dublin and Cork, and the relatively easy access to the large populations in these cities
- Aid the promotion of exercise and activity and reduce sedentary behaviours
- Enable the *Great Southern Mountain Park* to act as an outdoor classroom for people of all ages
- Promote the appreciation and understanding of natural, cultural and built heritage within the boundary of the *Great Southern Mountain Park*

5.6 Key Components of the Strategy

5.6.1 Key Hub Identification

Having considered the results of the tourism and recreation product audit; the SWOT analysis; and intensive study area familiarisation, four types of **hubs** are proposed for the *Great Southern Mountain Park*. The traditional meaning of a 'hub' is the central activity area with a series of spokes emanating from it. Given the large area covered by the proposed boundary for the Park and the diverse range of things to do with various areas having different priorities there is justification for several hubs each inter-connected and radiating to nearby attractions and activities.

Some of these hubs are of a more significant nature than others and for this reason hubs can be divided into 'primary' and 'secondary' hubs which are to be termed 'Destination Gateways'. It is proposed the majority of these 'Destination Gateways' will have 'Get Out There Centres' to enthuse visitors about the range of things to see and do in the area and to give them the opportunity to access those activities with ease.

5.6.2 Destination Gateways

Primary Destination Gateways are those towns with the greatest visitor flow, visitor facilities & services and that are the most accessible. These towns were identified earlier in section 3.2, which also indicates justification for their selection, and are:

- Cashel
- Mitchelstown
- Cahir
- Clonmel
- Dungarvan
- Charleville
- Mallow
- Tipperary

Secondary Destination Gateways are those towns which offer a similar range of visitor facilities and services but not the same extent as those identified as Primary Destination Gateways. In addition they may be in close proximity to significant recreational resources or visitor attractions. These towns were also identified earlier in section 3.2 and are:

- Kilmallock
- Kilfinane
- Doneraile
- Lisvarriane
- Clogheen
- Cappoquin
- Ballymacarbry
- Carrick-on-Suir
- Lismore

5.6.3 Get Out There Centres

Get Out There Centres: It is proposed the majority of these primary and secondary gateways will host local offices with information on recreation and activities in the area provided in local information offices (TDI recommend these be branded 'Get Out There Centres' to align with Fáilte Ireland's Get Out There adventure activity initiative).

The purpose of these 'Get Out There Centres' is to excite visitors, providing a full range of information on the culture and history of the area; as well as information regarding attractions, outdoor activities and accommodation and bike and car/hire. It is proposed that the larger towns offer also booking facilities for accommodation and activities.

Recommended locations for the primary Get Out There Centres include:

- Cashel (Cashel Discover Ireland Centre)
- Mitchelstown (TBC)
- Cahir (Cahir Discover Ireland Centre)
- Clonmel (Clonmel Community Tourism Office)
- Dungarvan (Discover Ireland Centre)
- Mallow (Mallow Visitor Information Point)

It is recommended that a Get Out There Centre is not located at Charleville due to the proximity of Kilmallock and Kilfinane.

Locations for secondary Get Out There Centres include:

- Kilmallock (Kilmallock Heritage Centre – currently closed)
- Kilfinane (TBC)
- Doneraile (TBC, possibly Doneraile Court Tea Rooms)
- Lisvarriane (Glen of Aherlow Community Tourism Office)
- Carrick-on-Suir (Carrick on Suir Visitor Information Point at the Heritage Centre)
- Lismore (Lismore Visitor Information Point at the Heritage Centre)

It is recommended that, to avoid unnecessary duplication, Get Out There Centres are not located at Clogheen, Cappoquin and Clogheen due to the proximity of other centres. It is suggested that a roving mobile Get Out There Centre could be employed at peak season months which could visit a number of places such as The Vee car park, Doneraile, Kilfinane, Clogheen and Ballymacarbry.

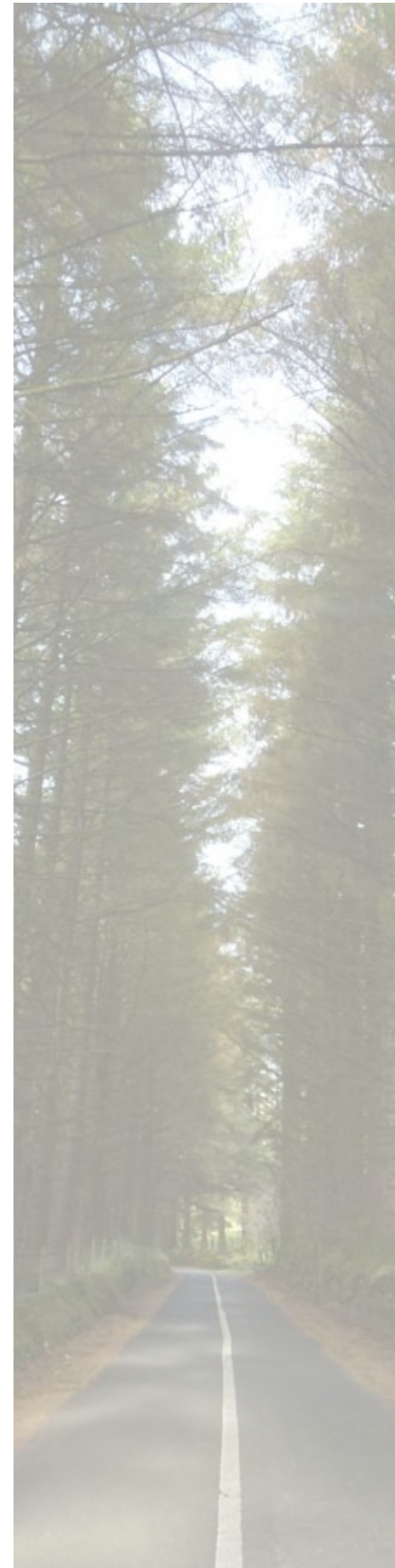




Table 22: Proposed Location of Primary and Secondary Destination Gateways and Get Out There Centres

Primary Destination Gateway with Get Out There Centre	Other Primary Destination Gateway	Secondary Destination Gateway with Get Out There Centre	Other Secondary Destination Gateways
Cashel	Charleville	Kilmallock	Clogheen
Mitchelstown		Kilfinane	Cappoquin
Cahir		Doneraile	Lismore
Clonmel		Lisvarriane	Ballymacarbry
Dungarvan		Carrick-on-Suir	
Charleville		Lismore	
Mallow			
Tipperary			

Proposed location of these Primary and Secondary Destination Gateways is shown on *Map 3: Primary and Secondary Destination Gateways*.

5.6.4 Adventure and Heritage Product Enhancement Programmes

A key aim of this overall initiative is to get more people using the *Great Southern Mountain Park* and to ensure they have a memorable experience whilst doing so. The development of visitor experiences as well as creating a range of recreational opportunities for visitors does not need a wide variety of new products but rather the enhancement and harmonised promotion of those that currently exist.

The *Great Southern Mountain Park* area currently offers visitors a wide range of outstanding adventure and heritage products but requires a boost to ensure people living within the Park boundary and other parts of Ireland as well as visitors to Ireland are aware of what is on offer and the ways and means in which to engage with that product offer.

A range of recreation opportunities enhancement actions are identified in section 6.2 in the action plan along with a range of measures to enhance heritage products in section 6.3. Marketing and promotion measures are discussed separately in section 6.5.

5.6.5 Multi-themed *Great Southern Mountain Park* Driving Route

Analysis of the tourism product audit produced several types of attractions/sites which fit into patterns/themes along with others of or related to its type, which together could generate potential interest from visitors. These include:

- Medieval Heritage
- Religious heritage
- Outdoor Activity/Adventure
- Artisan food and farmers markets
- Arts and craft

A touring route is proposed for The Great Southern Mountains Park Touring Route is proposed which would link the four mountain areas. This route is shown on *Map 8: Proposed Great Southern Mountain Park Touring Route*.

While this route would form the basis for a driving route it is envisaged that there would be a network of spurs off this route depending on the theme followed which would be promoted as a package in the same format as the Grand Tour driving routes for County's Kildare and Wicklow. Greater detail on the various products that could be included in these themes can be found in Appendix A4: Product Audit Detail.

5.7 Market Targets and Tools

5.7.1 .Target Market and Segments

The matrix outlines the major product development opportunities related to markets and market segments identified in the present tourism marketing strategies for Ireland, as summarised in Chapter 2.

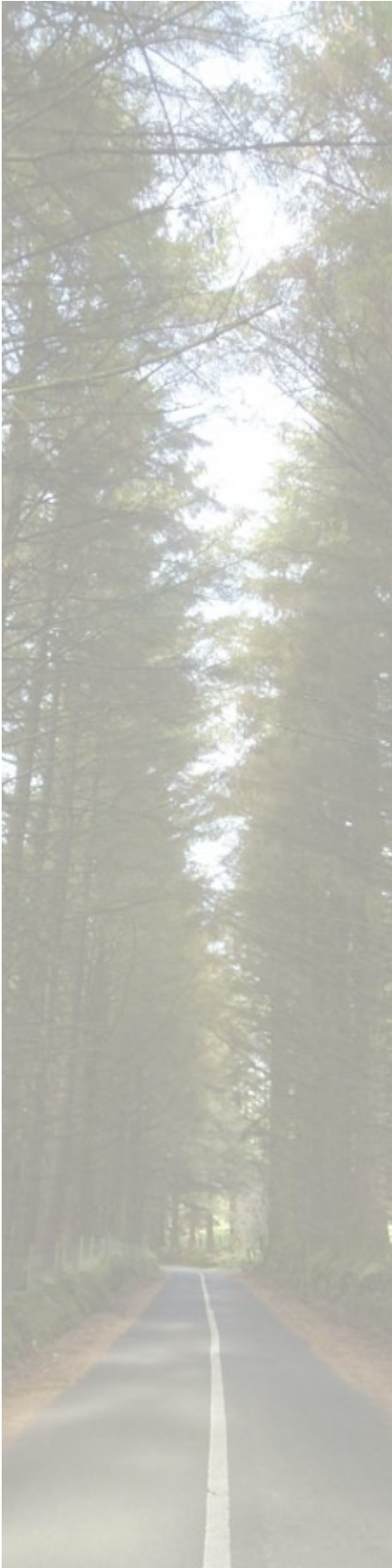
The key principles governing the market:product matching exercise are:

1. the strength of international market segments for:
 - outdoor activity pursuits,
 - combined sightseeing and cultural heritage interests, and
 - those seeking respite from urban lifestyles
2. the development of "experiences" (i.e. things to see and do) that can occupy a one to 4 day stay in the area – vital to attract the domestic Irish visitor market, as well as the overseas holidaymaker
3. the need to develop a distinct and distinctive identity that complements and fits within the branding of the regions within which the *Great Southern Mountain Park* is located.



Table 23: Product Market Matrix

Markets/market segments Product	Domestic (Ireland)		International		GB				GB, Germany, France, Netherlands	All Markets
	Recreation – short trips	Overnight or longer holidays	Sightseers & Culture Seekers/ Culturally Curious	Social Energisers	Culturally Curious	Great Escapers/ Scenic Relaxers	Social Energisers	Top Tanners	Adventure/Activity Enthusiasts	Coach Tours
Walking/hiking	●	●	●		●	●		●	●	●
Cycling (inc Mountain Biking)	●	●	●			●		●	●	
Angling	●	●				●			●	
Other outdoor activities (equestrian, river-based etc)	●	●	●			●		●	●	
Nature – soft adventure, bird watching, etc	●	●	●			●		●		
Culture/heritage – sites (day visits)	●	●	●	●	●	●	●	●		●
Culture/heritage – events/ festivals	●	●	●	●	●	●	●			●
Combined Nature & Culture/ heritage - touring routes		●	●		●	●				●





5.7.2 Information Dissemination Strategies and Tools

Having carried out market research to identify the likely markets and developed a product that will fit that market it is essential that the product is presented in the best way possible. In recent years the advent of new technology has increased the range of ways to do this i.e. maps, apps and brochures.

While print media is still a valid form of presenting a trail route, and some visitors are more comfortable with this, use of smartphone/tablet applications to present maps, interpretation and stories offers more flexibility, greater breadth of communication and easy updates. The more successful marketing campaigns use a combination of print media, downloadable maps and information, online information and fully interactive apps.

Capitalising on national and international tourism marketing from Fáilte Ireland/Tourism Ireland is considered to be essential, through close interaction with their product support teams and ensuring product information is made available on the www.discoverireland.ie and www.ireland.com websites.

Fáilte Ireland recently commissioned research into demand for conventional travel-guides and for smart-phone applications⁶. The key recommendations from this report are:

- Don't forget about traditional travel guide use such as guide books
- Cost of travel guides
- Create or incentivise free Wi-Fi zones
- Promote free Wi-Fi zones
- Tourist offices should be plugged in and make the visitor experience more interactive
- Charging stations will help with business
- Get familiar with the technology
- Update on an ongoing basis
- Collect data from your travel app

⁶ An Assessment of Tourist Demand and Use for Travel Guides, Fáilte Ireland/IT Sligo, 2012

- Promote your app well
- Integration of Social networking, reviewing and sharing is King
- If you have the finance to invest in this area consider next generation functionality
- Develop enterprise solutions based on target demographics and related use patterns
- Always think about independent travel service providers

The information dissemination strategy for the proposed *Great Southern Mountain Park* is ultimately dependent on the resources and funding available to the Destination Partnership. However the strategy should include the following elements:

- Website
- Print media
- App
- Social media
- Physical signage

Specific detail relating to action regarding a website, app, print media, social media are given in section 7.5 and detail regarding physical signage is outlined in section 7.9

5.8 Projected Growth Rates and Destination and Marketing Costs (5 Year Plan)

Projected tourist arrival growth rates for Irish tourism as a whole – percentage rise over previous year - are as follows:-

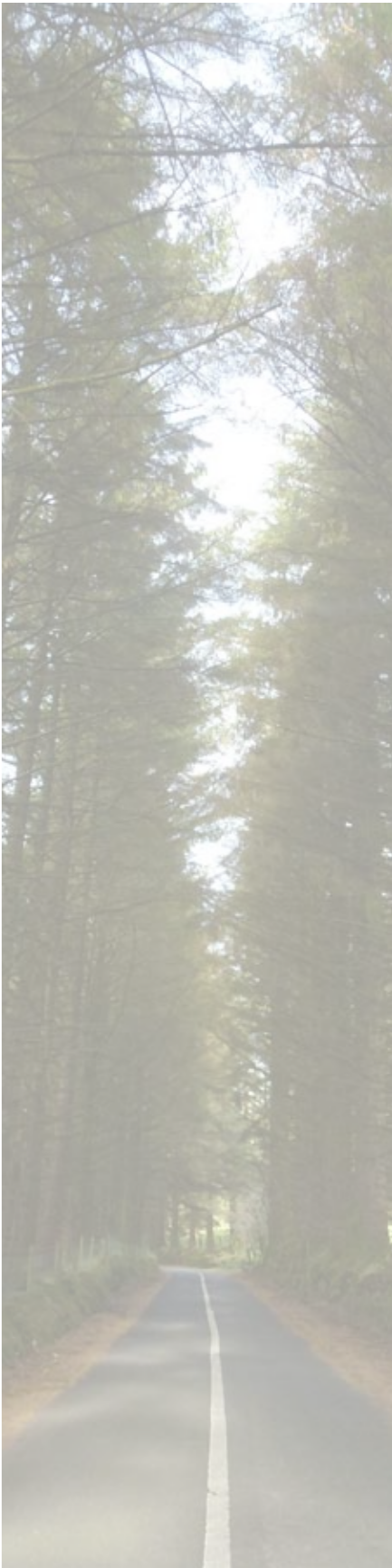
Period	Overseas Tourism	Domestic Tourism
2014-2016	+5 – 6%	+1%
2017-2020	+3 – 4%	+2 – 3%

TDI estimates that:

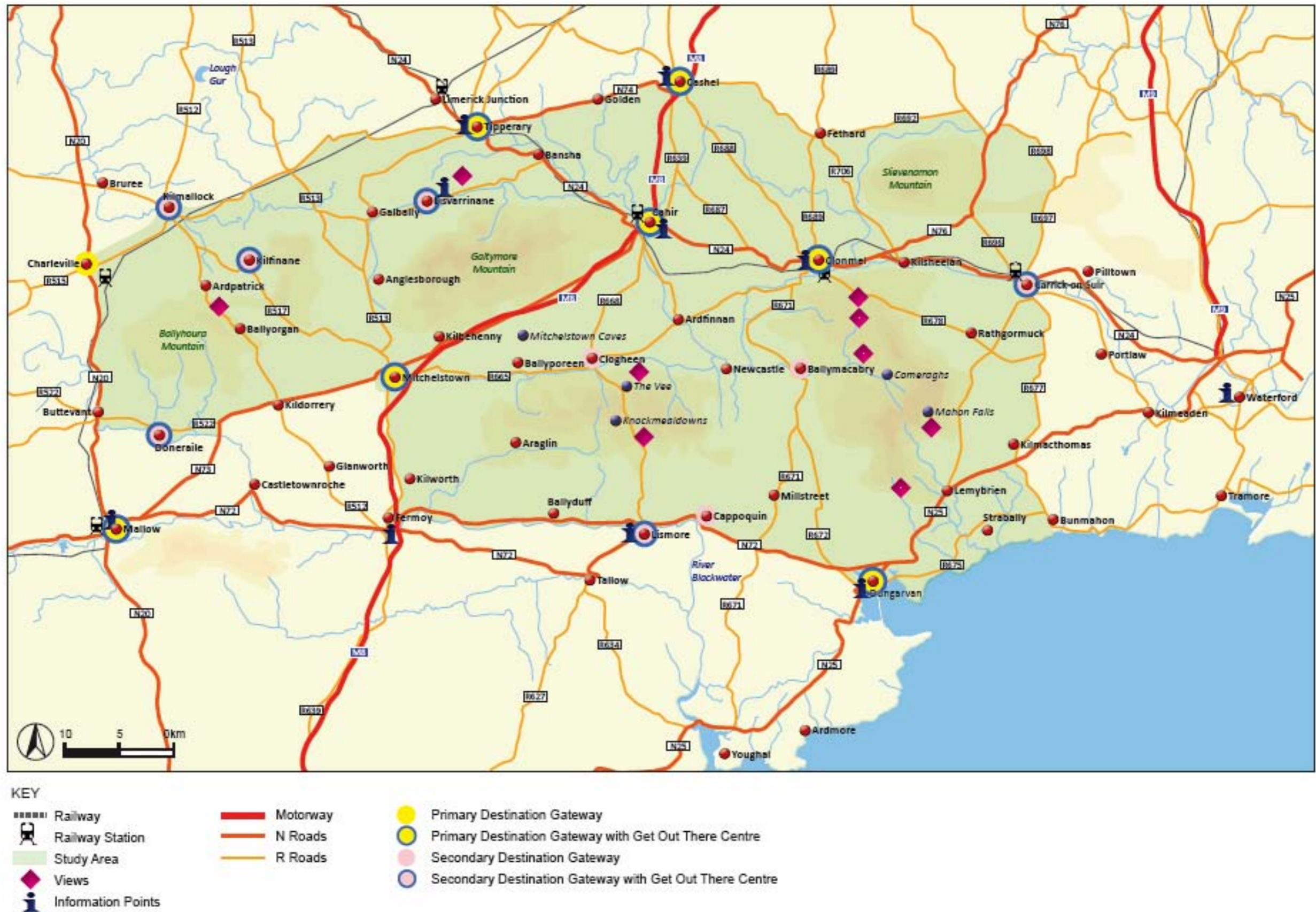
1. the cost of implementing the proposed destination development and marketing plan for the Great Southern Mountain Park for a period of 5 years will be € 1.3 million. € 1 million of this has been allocated to development and marketing and a further 300k has been allocated towards the salary of the dedicated Mountain Park Manager (5 years @ 60k); and
2. this level of investment will be necessary to enable the region to match the projected growth rates for Irish tourism as outlined above. Failure to invest in the study area as outlined will lead to a loss of market share for the Great Southern Mountain Park destination.

5.9 Great Southern Mountain Park Maps

- Map 6: Destination Gateways
- Map 7: Great Southern Mountain Park Way
- Map 8: Southern Mountain Park Touring Route



Map 6: Proposed Location of Primary & Secondary Destination Gateways and Get Out There Centres



Map 7: Proposed Great Southern Mountain Park Way Walking Route



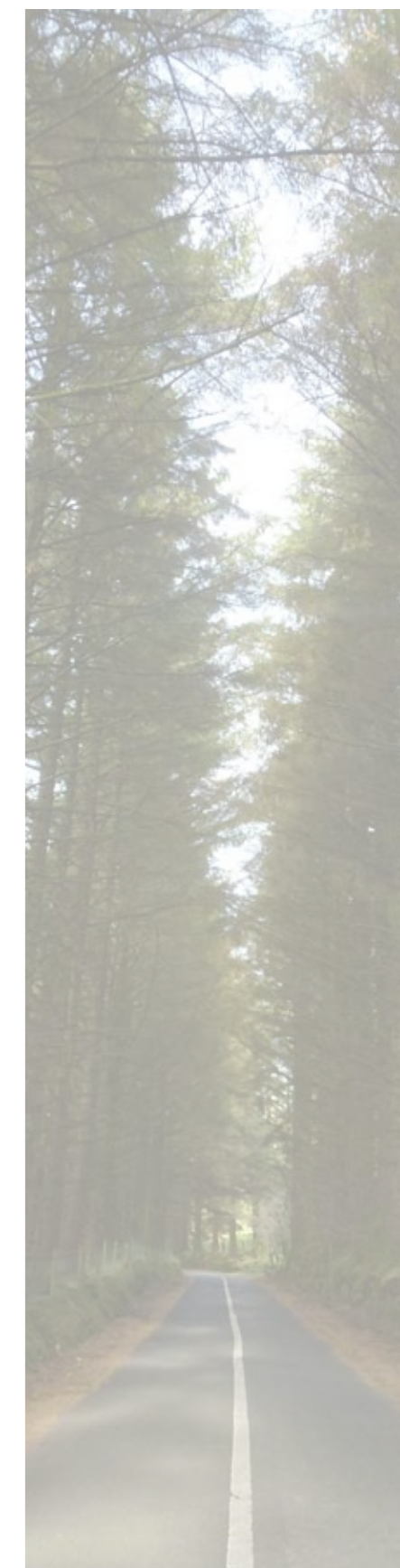
KEY

-  Railway
-  Railway Station
-  Study Area
-  Views
-  Information Points

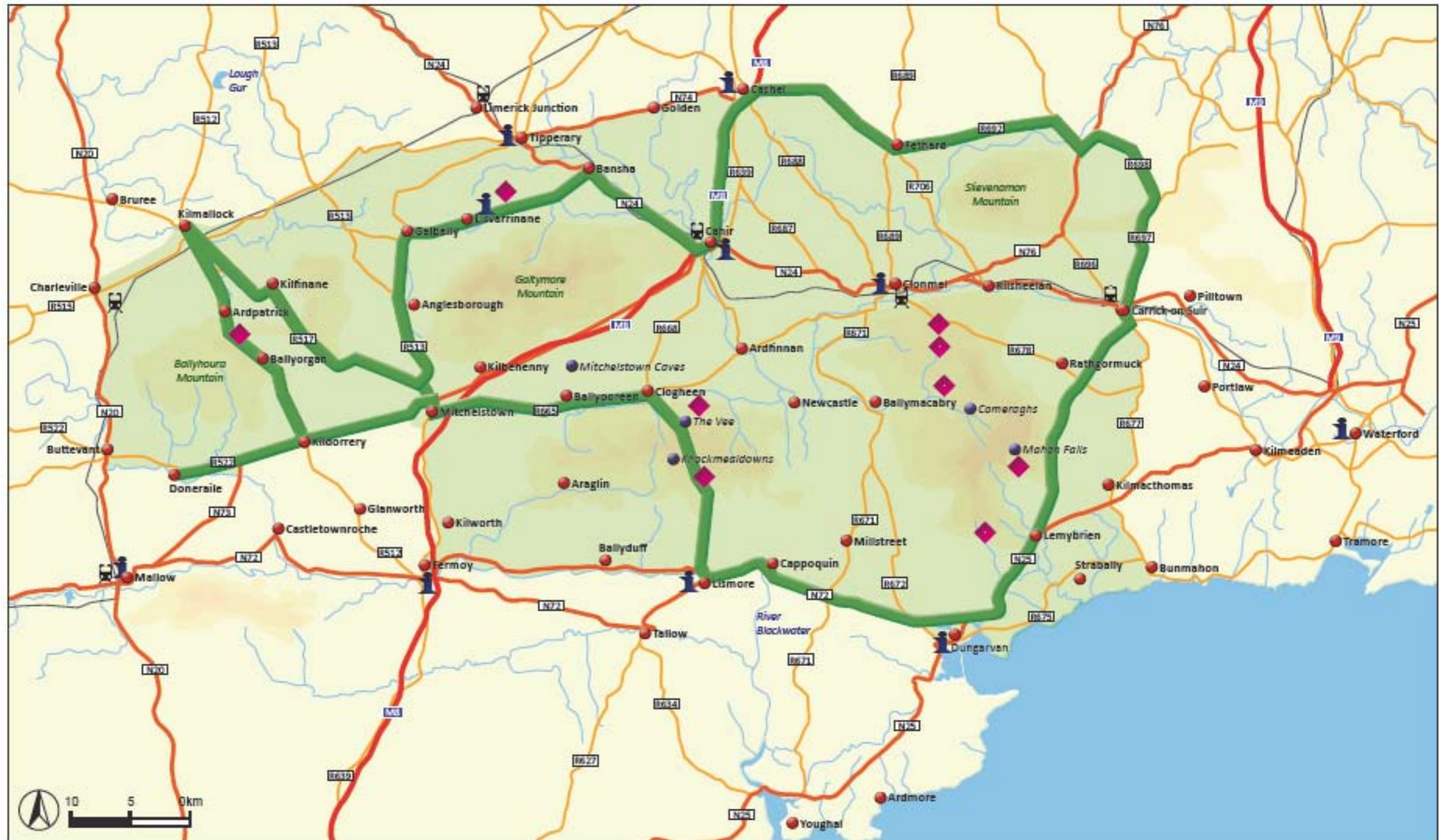
-  Historic Town Trail
-  Walking Hub
-  Proposed Great Southern Mountains Park Way

WALKS

1. St Declan's Way
2. Avondhu Way
3. The Ballyhoura Way
4. The East Munster Way
5. The Tipperary Heritage Way
6. 4 Counties Route

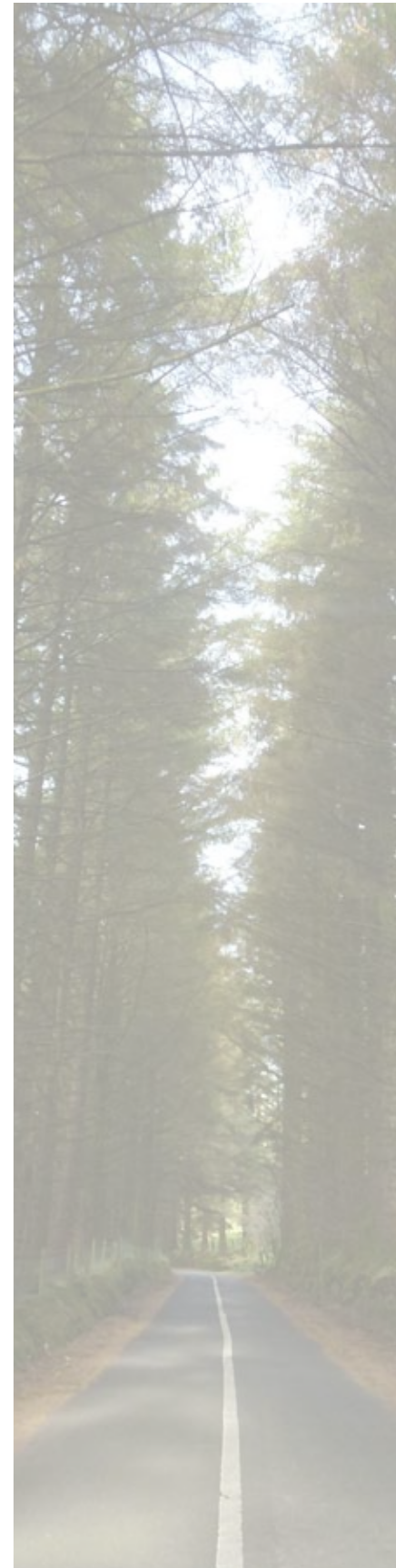


Map 8: Proposed Great Southern Mountain Park Touring Route



KEY

- | | |
|--------------------|---|
| ----- Railway | Motorway |
| Railway Station | N Roads |
| Study Area | R Roads |
| Views | Indicative Great Southern Mountain Park Touring Route |
| Information Points | |



CHAPTER 6: CONSUMER TESTING OF PROPOSITION AND RISK ASSESSMENT

6.1 Structure of Validation Testing

TDI conducted interviews related to the emerging brand proposition for the study area in two stages:

- First, in the period December 201/January 2014 when interviews were carried out with 15 tour operator members of the Incoming Tour Operators Association, dealing with a wide range of travellers i.e. coach tours, FIT and independent travellers, educational groups, incentive groups and general activity tourists; and,
- Secondly, between mid January and end February with 18 overseas adventure and activity tour operators from 8 countries.

This testing was supplemented through an interview programme with operators of attractions, accommodation and catering establishments from across the study area.

The testing is reported on separately for the two tranches of the tour operator survey, in each case outlining the background to that part of the survey, the main findings and conclusions drawn from the results, and a selection of the most helpful direct quotes from respondents. The full results of both parts of the survey in PowerPoint presentation format are included in the report as Appendix A5.

6.2 ITOA (Incoming Tour Operators Association) Survey

6.2.1. Background and Briefing

The interviews with ITOA members were carried during a period when the proposition was in development and had not been fully clarified. The briefing provided to respondents was, therefore quite broad so as not to compromise and impose a straitjacket on the ideas elicited from respondents.

The purpose of this round of consultations was to gauge tour operator feedback on the likelihood of the study area being capable of delivering the primary objectives of increased visitor flow, nights, spend and satisfaction through the:

- development of products and experiences in an integrated way across the area, and
- marketed under an umbrella brand proposition of both scale and singularity.

The interviews focused on identifying appropriate product/ experience types and bundles, the improvement of linkages between attraction/activities (both within and in areas contiguous with the study area), as well as with service providers, and the exact delineation of the study area.



6.2.2. Main Findings and Conclusions

Three-quarters of the ITOA sample supported the contention that promoting the study area as a brand has real merit, stressing that it will be the combination of “adventure” coupled with “an old fashioned rural and authentic Ireland” that is its main appeal. However, the challenge was noted of the need to “halt corridor tourism” for the concept to work in practice.

Half of the sample identified outdoor activities as the feature with greatest appeal, while 40% stated rural towns and villages as having the most potential. While it might have been expected that a higher proportion would have indicated outdoor activities, this finding reflects the fact that the sample was widely drawn with few adventure/activity operators featured. There was strong interest in packaging mountain activity with local communities in order to offer “an authentic rural and historical Ireland experience”, equal weight being given to activities and cultural heritage. The role of local people was seen as especially important, going the extra mile in terms of welcome and service.

In facilitating direct access for visitors to the cultural heritage of the study area, a recommendation was made that “a hands-on demonstration of traditional crafts/trades should be provided” while “knowledge of area’s unknown treasures or historical spots” could be increased by developing them more for tourist visitation.

Of the activities proposed for the study area, the development of integrated walking trails **with more things to do** was supported by two-thirds of ITOA respondents.

Over a half of respondents would be prepared to promote the study area on their websites, and a similar proportion considered that the key would be for the development of branded itineraries focused on elements that are “authentic, rural and unique”

In terms of target markets, responses tended to reflect the focus of the business in which the individual respondent operated e.g. coach tours, student/education visits, incentive trips. However, in respect of overseas markets, outdoor activity segments and cultural heritage tourists AND the combination of the two were most widely supported as primary target market opportunities.

Within the domestic market, the focus was more on outdoor activities and special interest clubs (e.g. painting, yoga, jewellery making and other crafts), with the opportunity to engage in a specific interest in an area of natural beauty seen as having particular appeal.

The initiative for the realisation of the concept for the integrated development and branded identity of the study area needs to come from the operators, authorities and communities of the area itself, 80% of respondents identifying the operators as the principal movers with strong support from the local authorities, community groups and schools. Two-out-of-five respondents identified the support of Fáilte Ireland and Tourism Ireland as being important in the study area achieving its goal.

“Concept sounds interesting and appealing – it sounds like it would offer adventure – could also offer an old fashioned rural and authentic Ireland which has great appeal”

“Our clients want to engage with locals, learn of their culture, to return from their visit feeling enriched”

“There are authentic type crafts, baking, sports, Irish Dancing which can be displayed...These products can be packaged (for) the tourist who wants to experience something unique outside of the “big attractions” but also have the opportunity to visit a “big attraction” in the area if they choose”

“The destination needs to appropriately promote its landscape and the little unknown places, its histories, crafts, food – but keeping it unique and authentic”

“More and more places in the countryside are crowded and this destination/area is relatively unknown, which has great charm for people”

“The welcome of the people going out of their way to drive people from the bus to the B & B to the foot of the mountain will be the key to the success of this initiative”

“The walking trails can be promoted at home and abroad to all ages”

“Germany, Holland and France have a younger profile. They come in small groups or individually. They like the outdoor adventure and activities, and it could be promoted to them”

“Outdoor picnics at the end of the walking trail, they would need to be well presented like a nice tablecloth, offering local jams, cheeses, or produce with a Plan B if it rains which might mean having a shelter – entertainment and Irish music is always good”

“The destination is full of farms that can be visited. There are villages and towns also with old-fashioned pubs/coffee shops that can offer a drink, or tea and scones – such places would develop to meet market need”

“The smaller size buses are now taking over from the bigger coaches and they would be well used in this area with its small winding roads”

Challenges

“Challenge will be to halt corridor tourism”

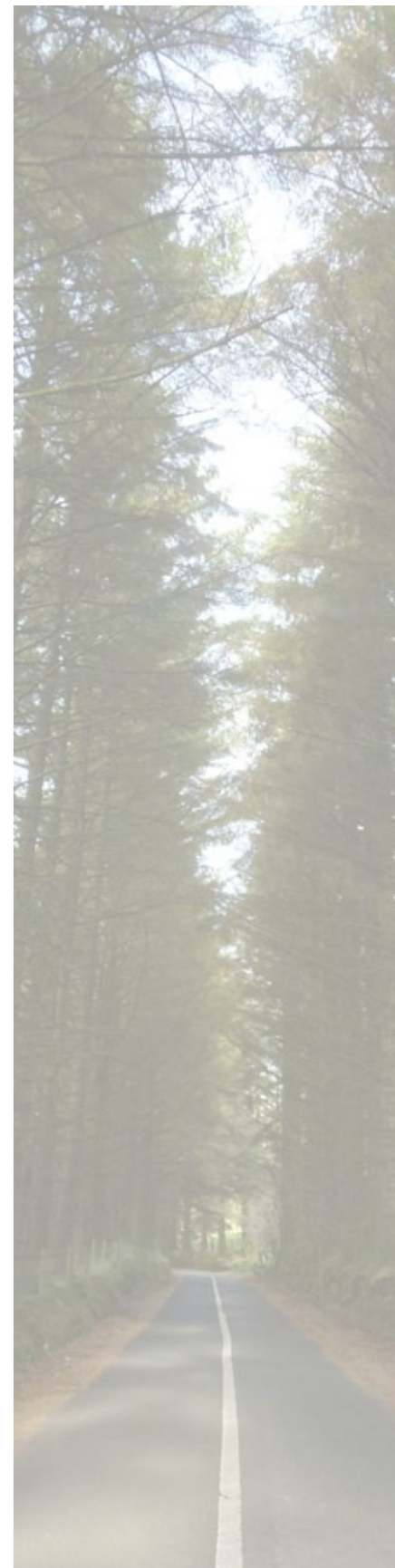
“There needs to be good transport routes/options etc”

“It would take a good reason for general group tours to visit and stop, like a good image, something very tangible, maybe something iconic like a story with the Devils Bit”

“Not enough hotels and B & Bs in Carrick-on-Suir”

“Good signage is the key”

“There is a lot of competition – the experience being offered needs to be interesting and unique”



6.3 International Adventure/Activity Tour Operators

6.3.1. Background and Briefing

In recognition of the fact that a number of the overseas tour operator respondents may not have first-hand knowledge of the study area, a background note accompanied by maps of the four mountain ranges was supplied. The note explained the purpose of the study as looking at the possibility of linking the counties of Waterford and Tipperary and neighbouring counties through the notion of a compelling brand. It explained that the four mountain ranges provide a mix of outdoor recreational activities, historic, coastal and rural towns and villages, with cultural attractions of scale and significance including a range of festivals and events.

The questionnaire was designed to test the concept of developing the study area as one of recreational excellence through a wide range of adventure and other less physically demanding activities all delivered to the highest quality COMBINED with visits to the towns and villages through interaction with local people and exposure to traditional crafts and lifestyles. Respondents were asked for their overall reaction to the concept and to identify aspects of the study area of greatest appeal/potential. They were asked to rate six attractions/activities (i.e. walking, cycling, angling, towns and villages, heritage and cultural attractions, festivals and events) according to high/medium/low appeal.

Questions were posed as to the appropriateness of the size of the area as a marketable destination and the possibility of dividing it into recreational zones.

The appeal of a multi-component holiday combining adventure/activity with cultural heritage was probed. The key attractor of the area and the principal types of activity of the operators' clients in the area were identified.

6.3.2. Main Findings and Conclusions

Two-thirds of respondents endorsed the concept as outlined to them as a good idea, while one fifth expressed concern about the scale of the challenge to realise the goal.

Half of respondents identified the outdoor adventure and other activities, reflecting that this is their main sphere of operations, but significant numbers also acknowledged the importance of the historic towns and villages, and getting immersed in local culture with interaction with the people of the area.

It is striking that 15 of the 18 respondents identified its towns and villages as having a high or medium significance in respect of the focus of the brand identity of the study area. This level of endorsement is very similar for two other resource and product categories – namely walking, and heritage and culture – with cycling also supported by over a half of respondents. This suggests strongly that the combination of adventure/activities with cultural heritage/local communities is the key to a successful brand proposition in the opinion of overseas tour operators.

Even those specialising in adventure/activities recognise the importance of the setting in which such pursuits take place and the appeal of the local population and its traditions. This finding is reinforced by the fact that 14 of the 18 operators said that their clients would be interested in a multi-activity holiday combining adventure with heritage. Also, supporting the idea that adventure and culture fit together in the study area, is the finding that the key attractor identified by respondents varies across six different aspects, each identified by different respondents as significant draws for the area i.e.

- great walking paths and trails
- pub music
- welcoming accommodation - local guesthouses and farms – giving the opportunity to get to know the locals
- mix of adventure multisport activities
- Irish culture – festivals – and history
- good food

Two-thirds of respondents stated that the principal interest of their clients in the study area would be as a walking/hiking trip linked with heritage; with cycling/biking cited by one-in-three respondents.

A strong majority of respondents believe the area is of an appropriate size to be considered as a destination region, with a number looking for it to be linked to other adjacent areas. 10 of the 18 respondents cautioned that while the idea might be an attractive one it will not succeed without an extensive and coordinated programme of product/experience development supported by a strong marketing campaign

Some of the most insightful direct quotes made by respondents about the potential of, and challenges faced by, the study area that help identify and shape the brand proposition and the priority actions are repeated below:

Validity of Brand Concept

"It's a great idea to promote Waterford + Tipperary and the surrounding counties"

"The idea of bundling these counties as a bouquet makes sense, this branded strategy of collectively marketing products will make their advertising and branding budgets stretch further and leverage the competitive role in cross selling opportunities"

"The brand should in sync with the Northern brand and this will give the halo effect on Brand Ireland"



Focus of development and product offer

"It's a good idea if enough activities are provided"

*"Walking can be clustered with heritage and festivals"
Clients do not just come to mountain bike, though that may be their motivating factor. They want to stop at heritage sites on their cycle, taste great food, and stay in welcoming accommodation. Perhaps listen to music in the evenings"*

"It is important to tie in with the cities, seeing and experiencing both a rural Ireland and a Cosmopolitan Ireland"

"We will be adding more lighter adventure and self drive adventure options later this year, as we are finding that more people want to relax and explore independently rather than walking + cycling every day"

"Our clients primarily travel with us to walk or cycle, see scenery, meet local people, try the great food and wine, and immerse themselves in local culture"

"Have marked paths to promote independent walking or cycling – have enough spots along the way to get picnics or lunches"

"The deciding factor for us would be that our walking trips are within 10/12 miles a day from their accommodation"

"Clients usually do a round trip from Dublin taking in the Northern or Southern part of the country – so you would form part of the Southern route"

Marketing

"Raising awareness of areas has to be the best way to get tourism in"

"Need for fabulous imagery of new destination"

"Need information on specific attractions"

"It is how the destination is marketed that will make the difference"

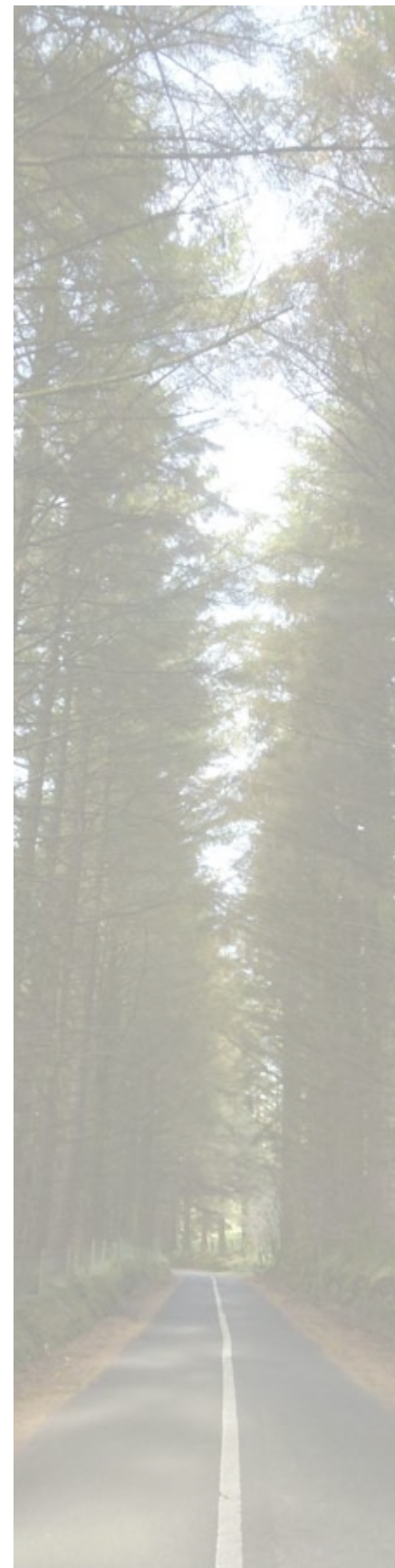
Challenges

"This area is not as popular as other regions like the West"

"Not easy to attract customers to this area form itself BUT easier to focus on some of the places as part of a larger tour"

"In fact at present almost all our groups (65 in 2013) drive through the area and don't stop along the way"

"Where roads are not marked we cannot organise self guided tours"



CHAPTER 7: DESTINATION & PRODUCT DEVELOPMENT ACTION PLAN AND TIMELINE

The following destination and product development programmes are proposed for the *Great Southern Mountain Park*:

- 1 Destination Management
- 2 Recreation Opportunities Enhancement
- 3 Heritage Product Enhancement
- 4 Access & Infrastructure
- 5 Marketing and Promotion
- 6 Collaboration and Linkages
- 7 Community Involvement
- 8 Training & Development
- 9 Education & Information
- 10 Responsible Tourism
- 11 Flagship Product Identification

In the subsequent sections the supporting rationale for the actions in each of these programme areas is outlined, highlighting product opportunities, followed by a programme area specific action plan identifying primary and support responsibilities, timeline for completing the action and key performance indicator.

In identifying the target markets for the different action programmes, the current segment of Sightseers and Culture Seekers and the planned one of Culturally Curious are taken as broadly the same in respect of potential and development requirements for the study area; and, similarly, the current Scenic Relaxers and planned Great Escapers segments as largely overlapping. For consistency and simplicity only the planned segment titles as outlined in the draft Tourism Ireland document Ireland's Brand Model are stated in the action programmes.

7.1 Programme One: Destination Management

The complexity and range of the inter-related actions proposed below, and the multiple agencies involved demands the establishment of a dedicated agency to facilitate and coordinate their implementation. It is therefore proposed that a **Great Southern Mountain Park Development Partnership** be established. This proposed limited company, of similar format to Trail Kilkenny, would implement the action plan and include a strong representative steering group with a lead figure/key driver. It is proposed the steering group of this body include representatives from:

- Ballyhoura Fáilte
- Aherlow Fáilte
- Galtees Recreational Steering Committee
- Knockmealdowns Active (Tipperary based)
- Knockmealdown Forum (Waterford based)
- Comeragh Mountains Forum
- County Waterford Trails Committee
- South Tipperary Tourism Company
- Waterford Leader Partnership
- Waterford County Council
- Cork County Council
- Tipperary County Council
- Limerick County Council
- Fáilte Ireland
- Coillte
- Inland Fisheries Ireland

It is proposed the Destination Partnership also include representatives from the accommodation sector, major attractions, and the local community. It is envisaged, as a limited company, this organisation would be able to attract finance from LEADER during the next round of funding.

It is proposed a **plan-led strategic approach** be taken by the Destination Partnership, to coordinate and direct the development of the *Great Southern Mountain Park*. It is proposed, once established, the *Destination Partnership* commission a *Great Southern Mountain Park* Management Plan. In tandem with this plan it is proposed that the Destination Partnership commission a marketing and promotion plan for the *Great Southern Mountain Park*.

The *Great Southern Mountain Park* Management Plan would include cohesive consideration on a multi-annual basis, of a range of issues including:

- access
- trail planning
- sustainable recreation facility development
- heritage attraction development
- accommodation sector development
- zones and gateways
- signage and interpretation planning
- recreation activity development
- visitor management
- visitor monitoring and impact mitigation (discussed further in section 7.11)
- conflict resolution
- volunteer management and training
- community involvement

The development framework for this plan would be based around four clear mountain area zones to facilitate strategic management of tourism growth. These were discussed earlier in section 2.1 and are shown on *Map 4: Mountain Areas*.

It is envisaged the Destination Partnership coordinate and drive development in the *Great Southern Mountain Park* and facilitate and kick-start key projects as outlined within this action plan, acting as a catalyst to realise the wider destinations potential. The aim is to increase collaboration between destination areas, industry providers and tourism & recreation groups.

As a destination management organisation the identification of a leader/key driver (the ‘Manager’) will be critical to the success of this project, as will the identification of adequate funding and resources. At the same time it is recognised that one person is unlikely to be able to implement all of the actions indicated below even over a multi-year timeframe.

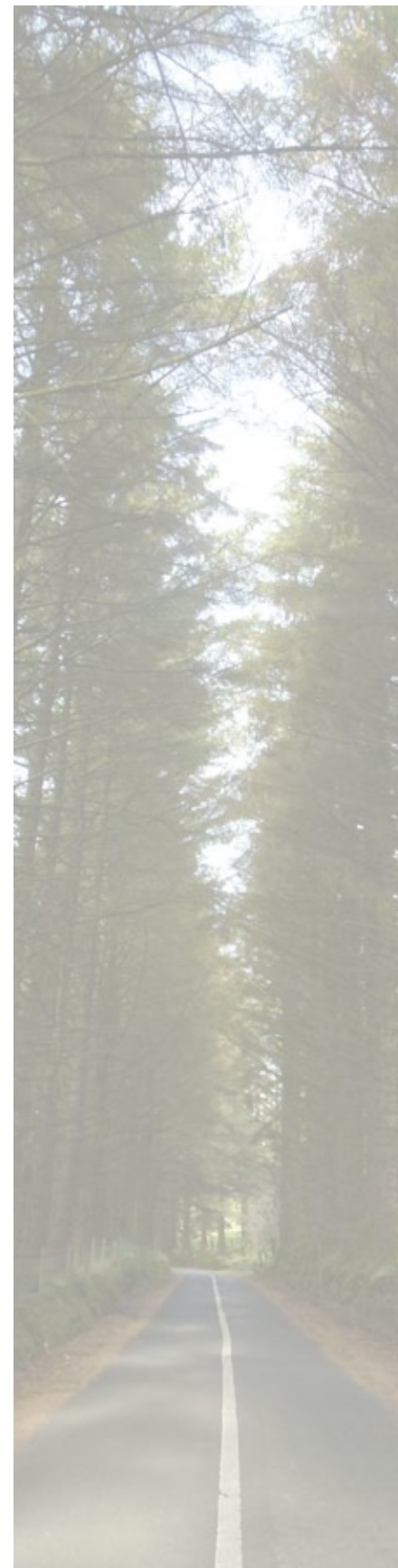
It is suggested the *Great Southern Mountain Park* be directed by a Steering Group, as indicated earlier and led by a core management team led by the Manager in association with the Rural Recreation Officers. This Core Management Team would be drawn from and be responsible for a number of Development Sub-Groups including:

- **Tourism Development & Marketing** (including county council representatives, Fáilte Ireland, Tourism Ireland, Waterford Leader Partnership, Ballyhoura Fáilte, Aherlow Fáilte, South Tipperary Tourism Company, attractions representative)
- **Recreation Management** (including Galtees Recreational Steering Committee, Knockmealdowns Active (Tipperary based), Knockmealdown Forum (Waterford based), Comeragh Mountains Forum, County Waterford Trails Committee, Coillte, Inland Fisheries Ireland, Mountaineering Ireland, National Trails Office, activities representative)
- **Heritage Management** (Built, Natural, Cultural) (including Heritage Officers, OPW, Heritage Council, NPWS, Coillte, attractions representative)
- **Community Relations** (including community and council representatives)

- **Education and Skills** (including Fáilte Ireland, Heritage Officers, NPWS, Department of Education representatives)

Another critical consideration is the overall timeline. It is fundamentally important that actions are prioritised that will ensure the overall *Great Southern Mountain Park* product is ‘fit for market’ before it is promoted. This includes issues such as access, environmental protection and the management of recreational facilities. For this reason actions in this regard are prioritised over those that relate to destination marketing in the action plan.

There a range of significant food cooperatives and tourism attractions in the *Great Southern Mountain Park* area who may be willing to be a **core sponsor** for the initiative particularly for the sponsorship of administration, marketing, walks and festivals. These should be targeted to investigate whether they would be willing to be involved. Other businesses outside the study area such as the pharmaceutical and IT sectors should also be targeted.



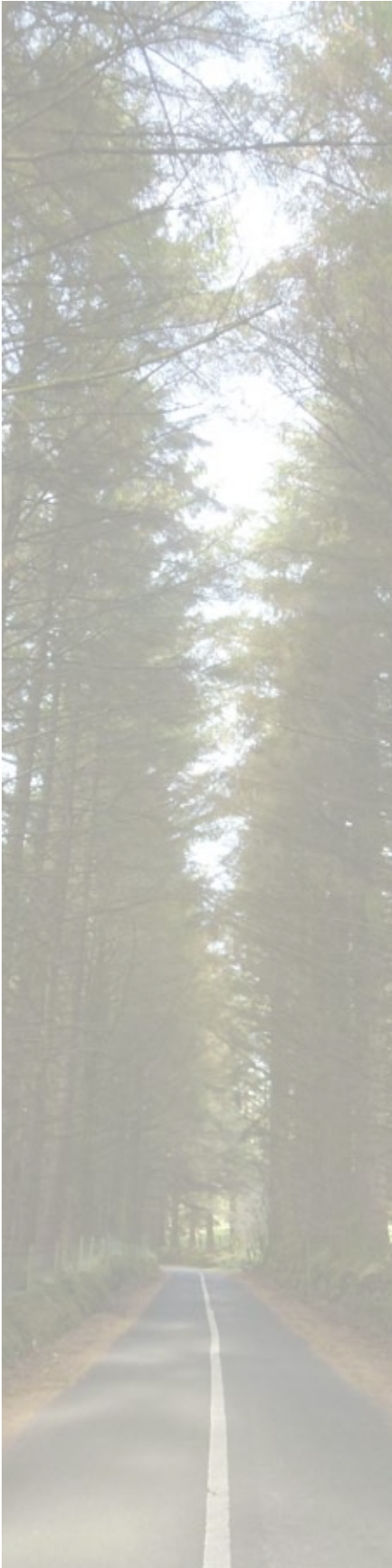


Programme 1: Destination Management						
Action	Lead Agency	Partners	Timescale	Target Audience	Key Performance Indicator (KPI)	Estimated Cost
Establish <i>Great Southern Mountain Park</i> Destination Partnership (GSMP Destination Partnership)	Project Steering Group	Ballyhoura Fáilte Aherlow Fáilte Galtees Recreational Steering Committee Knockmealdowns Active (Tipperary based) Knockmealdown Forum (Waterford based) Comeragh Mountains Forum County Waterford Trails Committee South Tipperary Tourism Company Waterford Leader Partnership Waterford County Council Cork County Council Tipperary County Council Limerick County Council Fáilte Ireland Coillte Inland Fisheries Ireland NPWS Local community representatives Accommodation sector representatives Major attractions representatives Local Development Companies Inland Fisheries Ireland (IFI)	Year 1	All visitors and local community	GSMP Destination Partnership established	
Identification and funding of leadership role for GSMP Partnership	Project Steering Group		Year 1		Key role holder identified	GSMP
Commission a <i>Great Southern Mountain Park</i> Development Plan.	GSMP Destination Partnership Manager		Year 1	GSMP Destination Partnership and other key stakeholders	Great Southern Mountain Park Development Plan commissioned	€ 65,000

Great Southern Mountain Park Manager = GSMP

Commission a GSMP Marketing and Promotion Strategy	GSMP Destination Partnership Manager		Year 2	GSMP Destination Partnership and other key stakeholders	GSMP Marketing and Promotion Strategy identified	€ 50,000
Investigate opportunities for corporate and other sponsorship for key elements of the GSMP Destination Partnership approach.	GSMP Destination Partnership Manager	IDA	Year 1	GSMP Destination Partnership	Range of key sponsors identified	GSMP

Great Southern Mountain Park Manager = GSMP



7.2 Programme Two: Recreation Opportunities Enhancement

The purpose of this programme, targeted towards recreation opportunities is to drive an increase in the volume of visitors using the *Great Southern Mountain Park's* recreational resources; to increase yield from those visitors; and to increase experiential satisfaction levels amongst these visitors.

In this regard, and reflecting the quality of the existing resource, the majority of the proposed actions relate not to new product and infrastructure development but to enhancement and promotion of existing resources to improve access and enjoyment.

Walking

The walking product is the core recreational product offer in the *Great Southern Mountain Park*. There is a wide range of high quality product with trails ranging from short walks to long distance multi-day routes. Walks vary in nature from linear to loop and from rural to the more urban historic town walks. Walks are promoted and managed by a variety of agencies. **What is required is better coordination, targeted development, and integrated promotion.**

As indicated earlier TDI are also proposing a new national way – The Great Southern Mountain Park Way from Carrick-on-Suir to Kilmallock joining these two towns united by medieval architecture. This trail will link all of the mountain areas and showcase some of the best views and attractions in the area.

The actions proposed below encompass these opportunities and others proposed within the SLR Consulting recreation strategies.

The Heritage Council online mapping system may prove a useful tool in the mapping of trail detail – see sample map in Appendix A6.

Cycling

Cycling is a popular activity in this part of the country, both cycle-touring and mountain-biking. There a large number of popular cycling events within the *Great Southern Mountain Park* area and many cycle routes emanating from towns in the area (see section 3.5.2 earlier). There are also many local cycle clubs and even a cycle holiday company specialising in a 5-day cycle route with bag drop available between different accommodation providers. **The cycle product could be enhanced, from a visitor perspective through the provision of better information on recommended cycle routes and opportunities for bike hire.**

Within the proposed boundary of the *Great Southern Mountain Park* is the premier mountain-bike facility in the country at Ballyhoura. Capitalising on the existence of this facility in marketing and promotion is discussed later, as is the linking of this facility with the accommodation product. The trails are already being enhanced (see section 2.1.2 earlier) and are now a significant visitor attraction. The opportunity exists in widening the appeal of the product through the development of more **family-friendly facilities**. In addition to children's trail, which are being developed, a high-quality play-park could encourage visitors to stay longer on site as would a visitor cafe, which would also provide local employment.

The St Declan's Way route from Ardmore to Cashel is largely on-road and may be better suited to a cycling route than a walking route.

Opportunities to promote cycling are discussed later in section 7.5, as are opportunities to link cycling with accommodation through the use of Cyclists Welcome branding and baggage transfer.

Angling

With the rivers Blackwater, Suir and Nire running through the *Great Southern Mountain Park* area anglers are spoilt for choice with some of the premier stretches in the country. Cahir has been designated an Angling Centre of Excellence for the quality of its Brown Trout angling and the angling at the Nire Valley is renowned.

The Clonanav tackle shop near Ballymacarbry is one of the best tackle shops in the country with a full suite of retail, guiding and accommodation services. The opportunity for angling lies in improving the **availability of access** for visiting anglers. This relates both to the availability of angling licences and to the angling related infrastructure along river banks.

There has been a significant decline in the volume of visitors who participate in angling in recent years, particularly from the UK. One reason for this is the perception of the impacts of poaching on fish stocks. To address this issue measures need to be taken to **reduce poaching** and to **promote the area as a well stocked resource**, particularly to the UK market.

The promotion of angling is discussed later in section 7.5 and the increased promotion of existing angling festivals and development of new angling festivals is discussed in section 7.5.

Equestrian

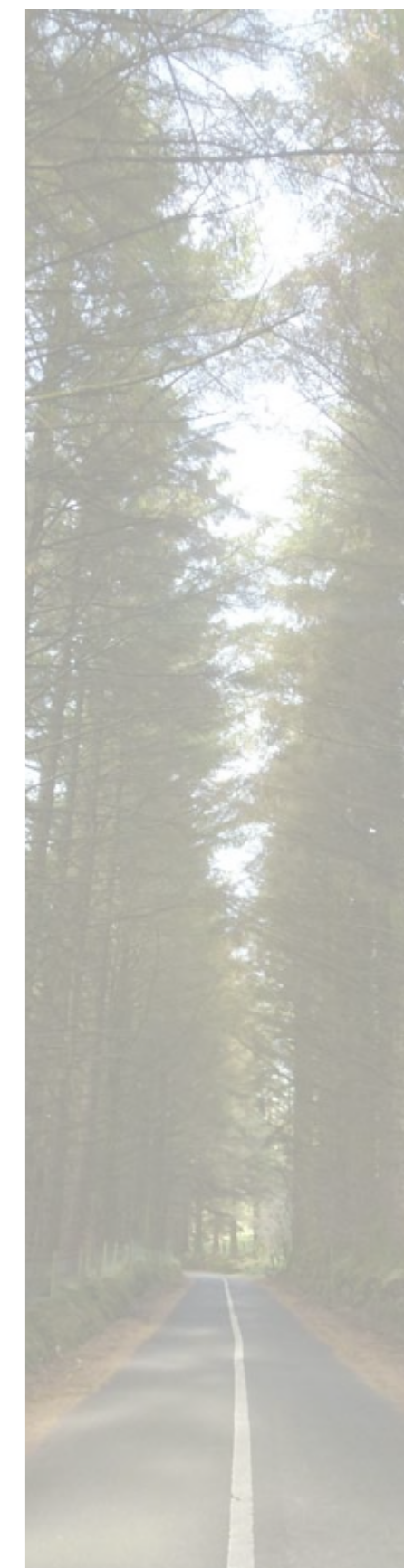
The opportunity for the equestrian product is in provision of **better information** for visitors regarding the current product offer – the availability of equestrian centres and the location of routes suitable for horse-riding. In addition there is an opportunity to develop a major equestrian experience in the area through development of **multi-day horse treks** over hills within the park boundary.

Canoe & Kayak

The proposed action for canoeing and kayaking relate to the identification of the optimum locations for **water-based trails** on the Rivers Suir and Blackwater in association with key activity providers. The identification and mapping of these 'blue-water' trails in addition to the location **of canoe/kayak hire facilities** will increase the possibility of visitors participating in this activity.

Programme 2: Recreation Opportunities Enhancement						
Action	Lead Agency	Partners	Timescale	Target Audience	Key Performance Indicator (KPI)	Estimated Cost
Walking Product Enhancement Initiative						
Audit of walking trails within the GSMP boundary to include trail condition, usage and signage.	GSMP Destination Partnership Recreation Development Group		Year 1	GSMP Destination Partnership	Audit of walking trail completed	
Commission overall map of walking trails within the GSMP boundary for use in print media and download.	GSMP Destination Partnership Manager	National Trails Office	Year 1	Hard and soft adventurers (walkers) Great Escapers	Map of GSMP walking trails available to the public in print format and for download.	€ 10,000
Commission standardised downloadable route maps for all walking routes within the GSMP area that can be downloaded from a website or used via an app.	GSMP Destination Partnership Manager	National Trails Office	Year 1	Hard and soft adventurers (walkers) Great Escapers	Route maps of GSMP walking trails available to the public for download from website or for use via an app.	
Identify location of multi-access walks and increase quantity of such walks annually.	GSMP Destination Partnership Recreation Development Group	National Trails Office	Year 1- Ongoing	Walkers with reduced mobility and others who require multi-access trails	Identification of existing and development of new multi-access trails.	GSMP
Investigate opportunity to develop the County Wall route along the Knockmealdowns ridge as a new walking product. This will likely require negotiation and permissive access agreements with local landowners.	GSMP Destination Partnership Recreation Development Group	National Trails Office Local landowners	Year 1-3	Hard adventurers (walkers) Great Escapers	County Wall walking route developed	GSMP
Investigate the opportunity to provide an overnight hut for walkers in the Comeragh Mountains (possibly utilising an old scout hut) and in other mountain locations.	Comeragh Mountains Forum GSMP Destination Partnership Recreation Development Group	Mountaineering Ireland	Year 1-2	Hard adventurers (walkers) Great Escapers	Overnight walkers hut opened	GSMP

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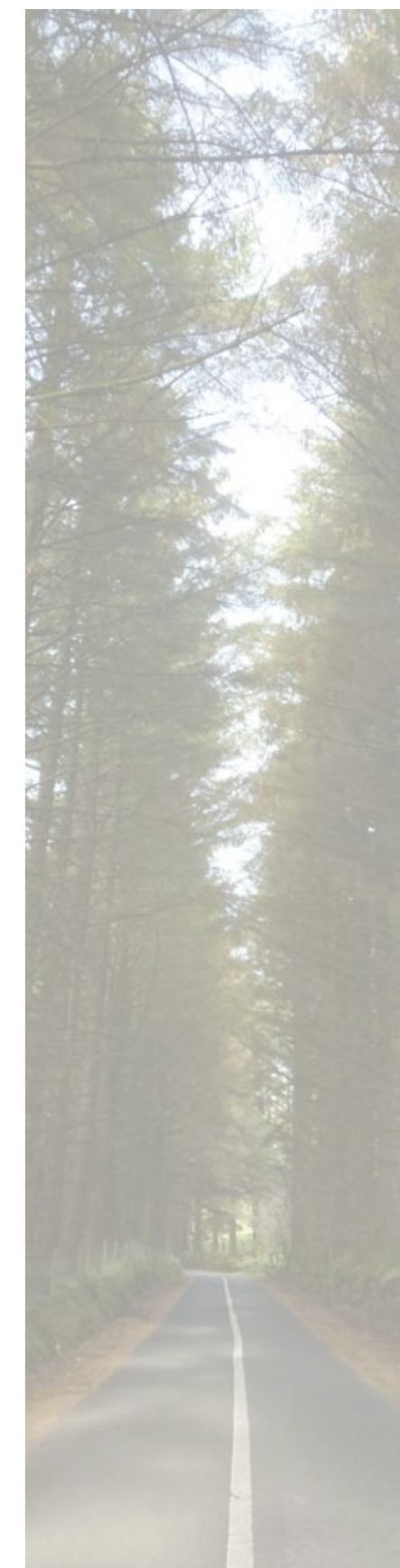




Promote use of the Walkers Welcome branding in the accommodation sector within the GSMP boundary.	GSMP Destination Partnership Tourism Development Group	Fáilte Ireland	Year 1	Hard and soft adventurers (walkers) Great Escapers Accommodation sector	Percentage of accommodation sector engaged in Walkers Welcome scheme increased.	GSMP
Cycling Product Enhancement Initiative						
Commission overall map of recommended cycling trails within the GSMP boundary for use in print media and download.	GSMP Destination Partnership Manager	GSMP Destination Partnership Recreation Development Group Local cycling clubs	Year 1	Hard and soft adventurers (cyclists) Local cycling clubs Great Escapers	Map of GSMP cycling trails available to the public in print format and for download.	€ 10,000
Further development of the Ballyhoura Mountains cycling facility with children's play park and enhanced visitor facilities such as franchised cafe on site next to Trailriders.	GSMP Destination Partnership	Coillte GSMP Destination Partnership Recreation Development Group	Year 1	Family market	Children's playground developed and visitor facilities improved.	
Commission feasibility study of the development of a St Declan's Way cycling route and implement if achievable.	GSMP Destination Partnership Manager Appointed external service provider	National Trails Office Local landowners	Year 1-2	Hard and soft adventurers (cyclists) Local cycling clubs	1. Feasibility study into St Declan's Way cycle route commissioned. 2. St Declan's Way cycle route operational	€ 20,000
Promote use of the Cyclists Welcome branding in the accommodation sector within the GSMP boundary.	GSMP Destination Partnership Tourism Development Group	Fáilte Ireland	Year 1	Hard and soft adventurers (cyclists) Local cycling clubs Accommodation sector Great Escapers	Percentage of accommodation sector engaged in Cyclists Welcome scheme increased.	GSMP
Angling Product Enhancement Initiative						
Work with Inland Fisheries Ireland and local clubs to increase availability of day licences for angling to increase angling opportunities for visitors. Enable purchase of licences in proposed Get Out There Centres.	GSMP Destination Partnership Recreation Development Group	Inland Fisheries Ireland Fáilte Ireland	Year 1	Soft adventurers (angling) particularly UK based. Great Escapers	Angling licences obtainable within Get Out There Centres	GSMP
Installation of new/upgrading of existing infrastructure, such as angling stands in targeted areas	GSMP Destination Partnership Recreation Development Group	Inland Fisheries Ireland Local angling clubs	Year 2-3	Soft adventurers (angling) – overseas and domestic	Improved access to key identified angling locations	€ 20,000

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Reduction of poaching and perception of poaching through information campaign, multi-lingual signage and marketing	GSMP Destination Partnership Recreation Development Group	GSMP Destination Partnership Local angling clubs	Year 1	Soft adventurers (angling) – overseas and domestic	Increase in fish stocks and improved perception of quality of angling amongst anglers.	
Increased promotion of existing angling festivals and development of new angling festivals (see also 6.4 regarding marketing and promotion)	GSMP Development Partnership Tourism Development Group	Inland Fisheries Ireland	Year 2-3	Soft adventurers (angling) – overseas and domestic	Increased numbers of angling tourists.	
Further development of 'Anglers Welcome' accommodation and angling packages in the area and a more proactive approach to attracting people to the area for angling holidays	GSMP Development Partnership Tourism Development Group		Year 2-3	Soft adventurers (angling) – overseas and domestic Accommodation sector	Percentage of accommodation sector engaged in Cyclists Welcome scheme increased.	
Development of wash-off areas to reduce transfer of alien species such as zebra mussels	Inland Fisheries Ireland	GSMP Destination Partnership Recreation Development Group	Year 1	Soft adventurers (angling) – overseas and domestic	Wash off areas developed	
Further promotion of bio-security information with anglers.	Inland Fisheries Ireland	GSMP Destination Partnership Recreation Development Group	Year 1	Soft adventurers (angling) – overseas and domestic	Bio-security information promoted to anglers	
Equestrian Product Enhancement Initiative						
Identify and map routes suitable for horse-riding within the GSMP and the location of equestrian centres for the hire of horses. Make maps available for downloadable from websites.	GSMP Destination Partnership	Local equestrian centres	Year 1	Soft adventurers (equestrian) – overseas and domestic Great Escapers	Horse-riding route maps available for download from websites.	€ 10,000
Develop a network of multi-day horse treks utilising mountain paths where appropriate.	GSMP Destination Partnership Recreation Development Group	Local equestrian centres	Year 1-2	Soft adventurers (equestrian) – overseas and domestic Great Escapers	Multi-day horse riding trails developed Increased numbers of visitors undertaking equestrian activities in the area.	€ 20,000
Canoe & Kayak Product Enhancement Initiative						
Identify and map blue water trails along Rivers Suir and Blackwater and location of canoe & kayak hire opportunities.	GSMP Destination Partnership Recreation Development Group	Local canoe and kayak clubs	Year 1	Soft/hard adventurers (canoe&kayak) – overseas and domestic Great Escapers Social Energisers	Blue water trails identified and location of canoe & Kayak hire mapped.	GSMP



7.3 Programme Three: Heritage Product Enhancement

The Heritage Product Enhancement Initiative covers:

- Built Heritage
- Cultural Heritage
- Natural Heritage

Built Heritage

- Built heritage product offer is discussed in section 3.6 earlier.
- **The built heritage product enhancement initiative includes maximising the tourism potential of these assets, integrating these assets with the adventure product and raising awareness among visitors of what the area has to offer.** It also focuses on the built environment and creation of **distinctive streetscapes** for towns within the *Great Southern Mountain Park* area through a re-painting programme as indicated in Fáilte Ireland's Heritage Towns Strategy. This would focus on streetscapes and residential and commercial buildings in the primary core of these towns/villages. An appropriate palette of colours would be selected. This would provide a simple yet dramatic appearance for participating towns/villages. Westport and Youghal towns implemented similar schemes with success.
- Maximising the potential of towns and villages is an integral part of developing a sense of place and an attractive environment. Many villages have **active tidy towns committees** and these should be further supported in their work to improve the public realm of towns and villages. Identification of those villages in need of a **Village Design Statement** is another focus to enable a strategic approach.

- The Heritage Council mapping system provides a useful tool to identify protected structures – see sample map in Appendix A6

Cultural Heritage

- Cultural heritage product offer is detailed in section 3.7 earlier.
- The range of product is already there in this area – **the challenge is to make visitors aware of the range of product and what it has to offer.** The Lismore Heritage centre 'Great Days Out' is an innovative concept that **packages tours** for visitors ('The Great Day Out', 'The Foodie Day Out' and 'The Garden Day Out') and which could be rolled out to other places in the Great Southern Mountain Park area.
- Also included in this area are artisan food & craft producers – while there are opportunities for the development of **food and craft trails** there is little point in doing so without the development of a 'visitor-ready product. Examples from other parts of the country where such a trail has been successfully implemented, such as Kilkenny, could form the basis for such an approach. Increasing the linkage with **accommodation could also be an opportunity so that accommodation producers stock and use local food and celebrate these in their marketing and menus** – providing visitors with a distinctive local experience.
- The cultural heritage sector also includes festivals and events; these are discussed later in section 7.5.

Natural Heritage

- Natural heritage product offer is detailed in section 3.8 earlier.

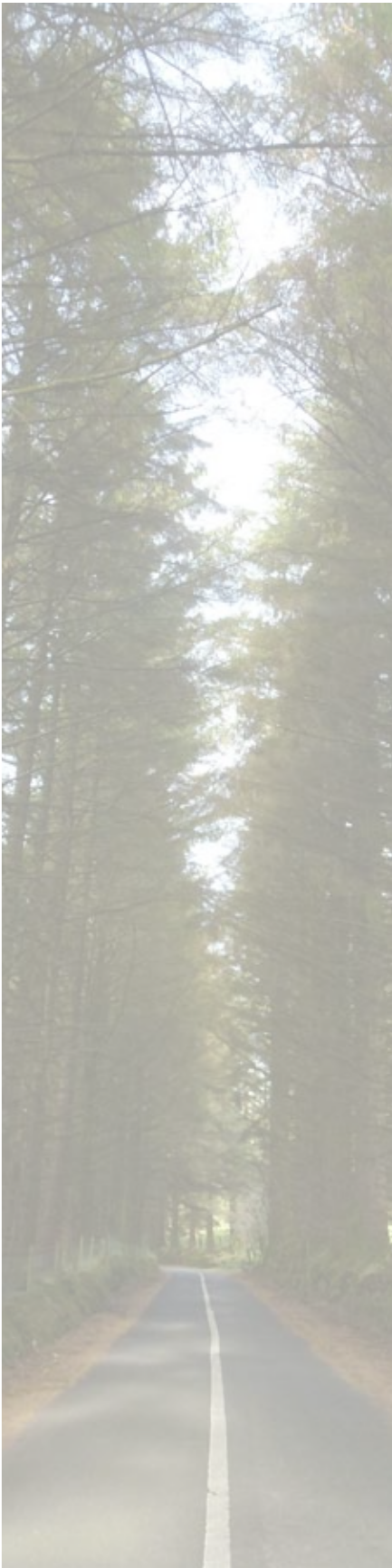
- The development of **bird hides** in the SPA's such as the Blackwater Callows and mid-Waterford coast could attract visitors interested in bird-watching. While protection of wildlife must be a key consideration, wildlife viewing opportunities could be identified, given basic services and interpretation and promoted to local residents and visitors. This programme also proposes development of nature walks in targeted locations and associated interpretative information on signage, brochures and websites. The Heritage Council online mapping system may be useful in mapping these areas – see sample map in Appendix A6.
- Given the potential of the Coillte Forest Recreation Sites for the attraction of a range of visitor segments the focus here is on the **provision of information to visitors, increasing their awareness of the existence of the forests and of the facilities available.**
- The view corridors within the study area are an integral part of the *Great Southern Mountain Park* product offer. For this reason a focus for this section is the support for the community organisations lobbying for protection of these views with regards to the Eirgrid proposals. Enhancement of selected viewing points is discussed later in section 7.4 regarding Access & Infrastructure. The Heritage Councils online mapping system provides a useful tool to identify these views and scenic areas – see sample map in Appendix A6.
- The GSMP product offer is enhanced by the inclusion in the area of the two Blue Flag beaches at Annestown and Bunmahon. To encourage greater use of these beaches a **comparative assessment** against other local Blue Flag beaches is proposed to determine whether aspects of these beaches can be upgraded.

- The many gardens which are open to the public within the *Great Southern Mountain Park* boundary offer an opportunity to develop a **gardens trail**. By the nature of the product these are more likely to be ‘fit for market’ than food or craft producers and as such a gardens trail is likely to be easier to achieve in the short term.
- In some cases the challenge in increasing visitor dwell time is in finding experiences or **combinations of experiences** that may appeal to all the family. Clogheen is a walking hub with many visitors wishing to participate in half or full day walks and nearby Parson’s Green offers families a range of activities including a park, pet farm, farm museum, picnic facilities, crazy golf, garden & river walks and a playground with cable swing. Communicating the proximity of these may result in families being able to do both, keeping everybody in the area for longer.



Programme 3: Heritage Product Enhancement						
Action	Lead Agency	Partners	Timescale	Target Audience	Key Performance Indicator (KPI)	Estimated Cost
Built Heritage						
Identify opportunities and invite proposals from the local community to maximise tourism potential of buildings under OPW management.	GSMP Destination Partnership Community Group	OPW Local community	Year 1	S&CS	Proposals developed for OPW attractions in the GSMP boundary.	GSMP
Include built heritage detail on overall visitor map of the GSMP area.	GSMP Destination Partnership Manager	OPW	Year 1	Culturally Curious	Built heritage attraction information included on map of area.	
Towns and villages re-painting programme in selected villages to create distinctive streetscapes	GSMP Destination Partnership Heritage Group	Sponsorship	Year 1	All visitors	Target towns and villages repainted	€ 10,000

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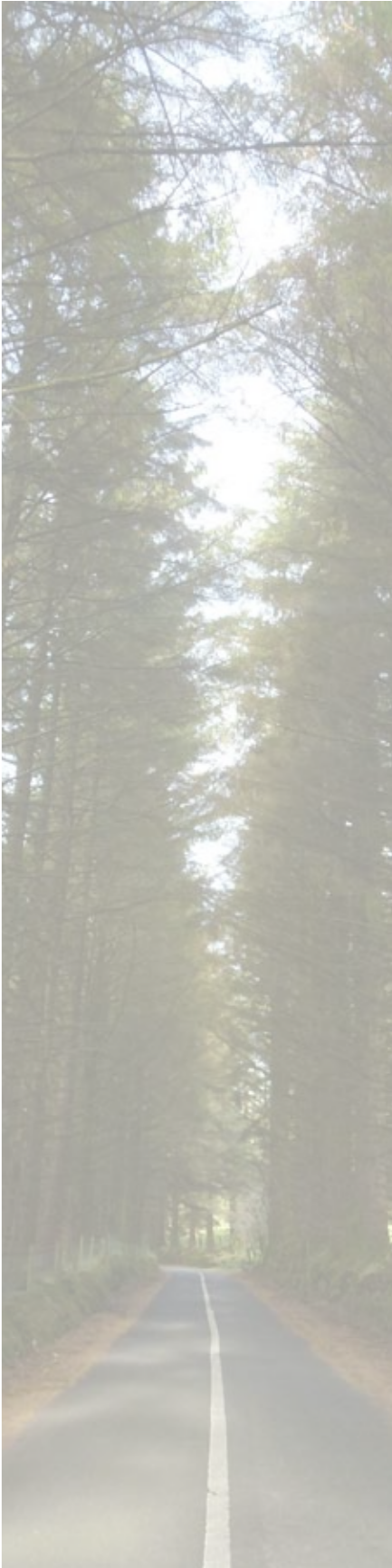


Tidy Towns Committees to identify significant local projects that could improve the character of their towns. These projects to be prioritised in terms of impact and achievability.	Tidy Towns Committees	GSMP Destination Partnership Community Group	Year 1	All visitors	Key projects identified for each town.	€ 15,000
Shortlist of places for which a Village Design Statement is required prepared and prioritised and implemented.	GSMP Development Partnership Heritage Group	Heritage Council	Year 1-5	All visitors	VDS prepared for key villages.	€ 50,000
Cultural Heritage						
Include cultural heritage detail on overall visitor map of the GSMP area.	GSMP Destination Partnership Heritage Development Group		Year 1	Culturally Curious	Cultural heritage detail included on GSMP visitor map	
Encourage all heritage centres to offer visitors 'Great Days Out' packages based on the model used in Lismore Heritage Centre.	GSMP Destination Partnership Heritage Development Group	Heritage Centres	Year 1	Culturally Curious	Great Days Out packages offered by all heritage centres.	
Investigate opportunity to develop food and craft trails in the GSMP using Trail Kilkenny's trails as an example	GSMP Destination Partnership Heritage Development Group	Food and craft providers	Year 1	Culturally Curious	Food and craft trails developed.	GSMP
Encourage accommodation providers to use local food producers and to highlight this on their websites and menus.	GSMP Destination Partnership Heritage Development Group	Bord Bia	Year 1	Culturally Curious	Annually increased number of accommodation providers offering local food products.	
Natural Heritage						
Identify wildlife viewing opportunities within the GSMP boundary and optimum location for nature walks and associated signage	GSMP Destination Partnership Heritage Development Group	NPWS	Year 1	Great Escapers Students	Wildlife viewing opportunities and key nature walks identified.	€ 20,000
Define nature walks and promote flora and fauna through signage and information.	GSMP Destination Partnership Heritage Development Group	NPWS	Year 1-2	Great Escapers Students	Increased number of nature walks developed.	€ 25,000
Provide information regarding Coillte Forest Recreation Sites on the overall visitor map of the GSMP.	GSMP Destination Partnership Heritage Development Group	Coillte	Year 1	Great Escapers Students	Forest Recreation Sites identified on overall GSMP visitor map	
Provide support for community groups opposed to the development of the Eirgrid pylon network on the basis of the tourism amenity value of views in and from the GSMP.	GSMP Destination Partnership Community Group	Local community	Year 1	All visitors Irish government	Communication made with government relating to importance of visual amenity to tourism in the GSMP.	

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Identify targeted measures in which the Annestown and Bunmahon Blue Flag beaches can be upgraded to maximise their appeal to visitors.	GSMP Destination Partnership Heritage Development Group	An Taisce	Year 1	Great Escapers	Measures taken to upgrade Annestown and Bunmahon beaches.	€ 20,000
Develop GSMP Gardens Trail and promote to visitors.	GSMP Destination Partnership Heritage Development Group	Fáilte Ireland Garden owners	Year 2-3	Culturally Curious Great Escapers	GSMP Gardens Trail developed.	GSMP
Provide visitors with detail of all-family combination experiences that will appeal to a wider audience.	GSMP Development Partnership Tourism Development Group	Fáilte Ireland	Year 2-3	Family market, particularly domestic	Visitor information with regard to combination experiences developed.	GSMP

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7.4 Programme Four: Access & Infrastructure

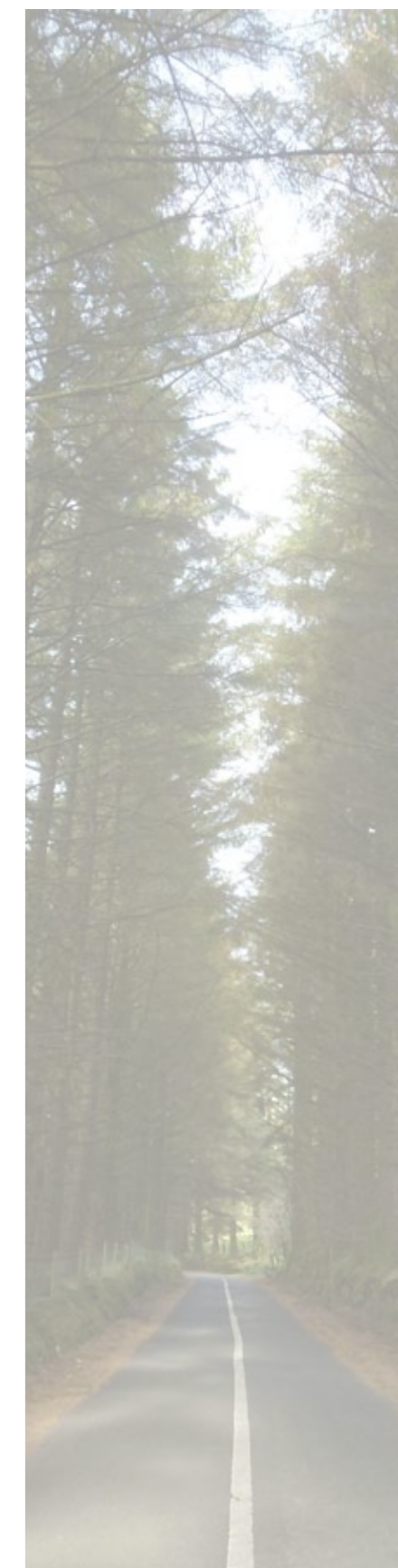
- The focus of the Access & Infrastructure Programme is to increase the ease with which visitors and local residents can access those places they wish to go, build on the infrastructure work completed to date, and to increase collaboration between destinations, industry providers and community groups.
- To encourage people participating in adventure activities to visit heritage attractions and vice versa it is proposed that **linkages** between attractions and trails are improved.
- The recreation strategies prepared by SLR Consulting identified locations where **car-parks at trail heads** could be provided or enhanced. Work in **this regard should be prioritised as should the provision of further stopping** places and picnic sites at places with significant views such as Mahon Falls, Nire Valley, The Vee, Knockmealdowns and Ballyhoura Woods.
- Comhairle na Tuaithe are currently piloting a **Mountain Access Project** in Galway and Kerry which is intended to provide a solution to issues of access to uplands. This is based on voluntary agreements with landowners. This approach could be used in selected areas within the GSMP to improve access, potentially in conjunction with Coillte.
- **Access for all** is an increasingly important issue and the accessibility of attractions and activities is an essential component of an inclusive tourism infrastructure. An accessibility audit will identify those places which offer accessible options and those where work is required.
- Visitors on bikes are more likely to stop at attractions if there is safe bike parking. Although many attractions have adequate **bike racks** there may be some which could be improved in conjunction with a core sponsor.

- To encourage more people to use public transport rather than cars and to enable people to undertake one-way journeys a **Public Transport Initiative** is proposed to investigate the optimum means of transferring people between accommodation providers and hubs within the *Great Southern Mountain Park*.



Programme 4: Access & Infrastructure						
Action	Lead Agency	Partners	Timescale	Target Audience	Key Performance Indicator (KPI)	Estimated Cost
Identify ways in which significant built heritage can be better linked to the adventure product e.g., walking and cycle trails and implement.	GSMP Development Partnership Heritage Development Group GSMP Development Partnership Recreation Development Group	OPW	Year 1	Soft Adventurers Great Escapers	Opportunities identified to link heritage attractions to local walking and cycling trails.	GSMP
Prioritise trailheads for upgrading including car-parks, signage, toilets.	GSMP Development Partnership Recreation Development Group	Coillte	Year 1	Hard & Soft adventurers Great Escapers	Priority trailheads upgraded	€ 100,000
Upgrade visitor facilities at key viewpoints	GSMP Development Partnership Recreation Development Group		Year 1	Great Escapers	Priority viewpoints upgraded	€ 20,000
Investigate opportunities to introduce Mountain Access Project in the GSMP area.	GSMP Development Partnership Recreation Development Group	Coillte Mountaineering Ireland	Year 1	Hard adventurers (walking) Great Escapers	Increased accessibility to upland areas in the GSMP area	GSMP
Commission accessibility audit and drive increased accessibility at visitor attractions where possible	GSMP Development Partnership Heritage Development Group		Year 1	Visitors with accessibility issues	Attractions within the GSMP are more accessible	€ 15,000
Investigate options to provide increased bike racks at visitor attractions within the GSMP area.	GSMP Development Partnership Heritage Development Group	OPW	Year 1	All visitors	Increased bike rack provision at visitor attractions	€ 20,000
Investigate the optimum sustainable means of transferring people between accommodation providers and hubs within the GSMP	GSMP Development Partnership Recreation Development Group	Rural Transport providers Bus Eireann	Year 1	All visitors	Improved public transport options for visitors	GSMP

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7.5 Programme Five: Marketing and Promotion

The purpose of this programme is to establish, raise and reinforce the profile of the *Great Southern Mountain Park* as a destination amongst the domestic and international visitor markets with close working co-operation between Fáilte Ireland, Tourism Ireland and the Destination Partnership Steering Group. There are several elements to this programme:

Brand Identity

The definition of a **brand identity** for the *Great Southern Mountain Park* includes logo development, design and strategy. This logo should reflect the brand positioning statement as outlined in Chapter 5.

Print Media

The traditional form of media i.e. brochures and leaflets incorporating maps are still important as not all visitors will have or want to use smartphones, tablets, etc. Increasingly print media is utilising imagery to draw visitors to a destination and combining this with links to websites with greater detail and videos of the destination. It is recommended print media include:

- Development of a master **Visitor Map** of the *Great Southern Mountain Park* showing towns, villages, rail stations, bike and walking trails including accessible walks, Get Out There Centres, driving routes, bike hire, accommodation, visitor attractions, castles & houses, viewpoints, forest parks, places for angling and bird-watching, adventure activities, location of food & craft producers. It is recommended the map have a print version available at key gateways and at all businesses within 10km of the *Great Southern Mountain Park* and a digitised web version capable of being tailored by visitors for the information they require e.g. bike/canoe trails or bundles and downloaded. This map could also include general information about the *Great Southern Mountain Park*, nearby attractions, events and themes and the top 10 attractions.

- This should be the **primary form of print media** for the trails (other than downloads) to minimise cost and to enable ease of updating those publications which are available for download (e.g. maps, apps and brochures). It is recommended this be distributed by an agency (e.g. Glance Promotions who distribute TrailKilkenny's Directory) to key tourist hubs (hotels and attractions) in the *Great Southern Mountain Park* area, Discover Ireland Centres and Visitor Information Points, hotels, cafes, book shops, libraries etc.
- In addition the Destination Partnership could consider the development of a **pocket guide** to walking and cycling trails in the *Great Southern Mountain Park* which could be made available in the various Discover Ireland Centres and Visitor Information Points.
- Print media, along with other material such as banners, posters and images could be used to promote the *Great Southern Mountain Park* at various events such as the Holiday World Show, World Travel Market, the Adventure Show and the Bike Show at the RDS in Dublin.

Digital Strategy

The development of a digital strategy for the *Great Southern Mountain Park* includes website, social media and smartphone application

- **Website:** A website or page is likely to be the first point of contact for many visitors and is easily updated in the event of information being updated, news regarding events or if trail routes are closed. Depending on resources this website could include elements such as sample itineraries, interactive mapping and a means of hiring bikes and booking accommodation & guides.

- The website could also include **downloadable route maps and trail brochures** in pdf format which can be printed out, along with text and photos. The website should be **smartphone enabled** so it is equally effective whether used on a PC, smartphone or tablet. This website should be **linked** to and from the www.discoverireland.ie website, County Council websites and tourism agency websites such as Waterford Tourism and Visit Ballyhoura. The website could follow the example of Snowdonia National Park (www.eryri-npa.gov.uk/visiting/attractions/Historic-Sites) and include detail on **historic sites** with text, images and location for each.
- It is recommended that a dedicated *Great Southern Mountain Park* section on the **Discover Ireland website** (www.discoverireland.ie/GreatSouthernMountainPark) include digitisation of Great Southern Mountain Park visitor map and utilise embedded video for park-based activities.
- Ensure information on Great Southern Mountain Park tourism product is included and optimised on www.discoverireland.com
- **Social media:** It is recommended the *Great Southern Mountain Park* is promoted using as a stand-alone brand with its own **Facebook** page. An @GSMP account would be the recommended location for promoting the *Great Southern Mountain Park* on **Twitter** to inform and excite visitors to the area. It is recommended the proposed **app be linked** to Facebook, Twitter and YouTube enabling visitor to add images and comment on activities and places they have been – a valuable marketing tool.

- **Smartphone Application:** Given the rapid growth in the use of smartphones and tablets the use of apps as a means of information dissemination and to promote the trail is highly recommended. Apps can clearly show information walking trails and historic heritage for relatively little cost; however budgets can often be found for the development of apps but it can be harder to find the budget, skills and resources to promote them. Elements which could be incorporated into an app for the *Great Southern Mountain Park* include:
- **Storymap** or similar could be used to highlight places and intangible stories of interest within the Park to interest visitors. Storymap (www.storymap.ie) works where a small team finds stories from an area, films them being told where they occurred, and then maps them online, mixing personal and historical stories to deliver a unique insight into a locality, prioritising the authentic 'local touch'. The wealth of personality and character of local people is conveyed to the tourist through entertaining stories.

Get Out There Centres

The proposed locations of these centres have been discussed above in 5.5.3. It is envisaged these visitor centres would link the *Great Southern Mountain Park* with Fáilte Ireland's "Get Out There" initiative. The aim will be to "create visitor experiences" and to ensure that visitors have a more memorable/broader tourism experience.

It is recommended all Get Out There Centres use audio-visual technology and photography to 'sell' the idea of a visit to the area, incorporate *Great Southern Mountain Park* branding and imagery, clearly defining their role as a Destination Gateway. The key aim of this initiative should be to get more people staying for longer in the destination.

Signage

Websites, maps, apps and brochures can be used to make people aware of the *Great Southern Mountain Park* and of what there is to see and do in the area however it is considered essential that the Park area incorporates **branded high quality signage**. This should include:

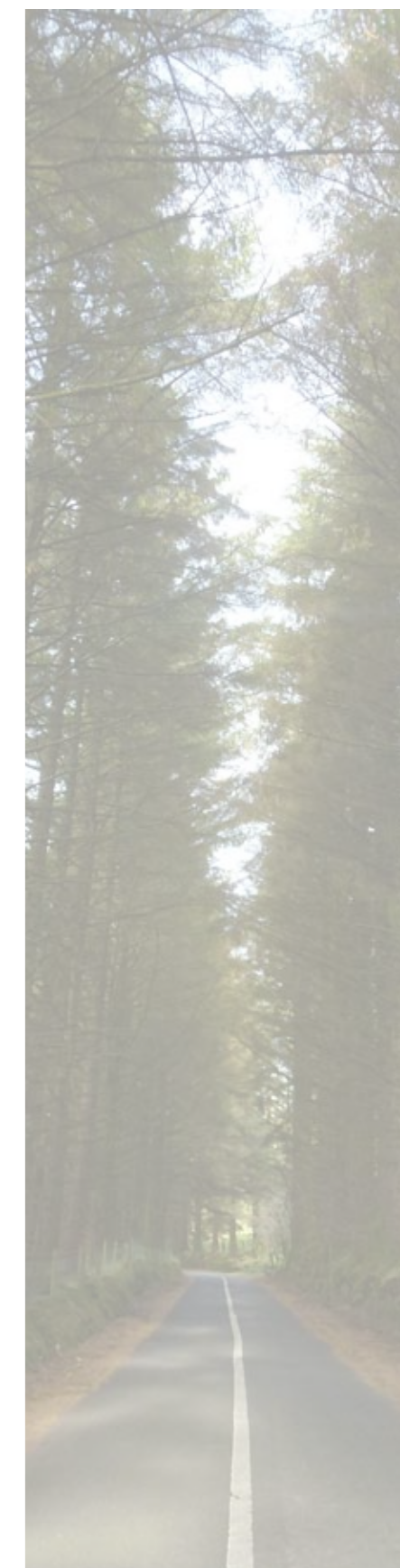
- Orientation signage (map information boards) located at destination gateways
- Directional signage with directional fingerpost signage, this could include directional signage to indicate trail routes and to indicate the location of heritage sites near the trail route.
- Interpretative signage i.e. panels in appropriate places

Signage should follow a common standard design including the *Great Southern Mountain Park* logo. Any tender for such signage could request a review of the design style against current best practice. Specific actions regarding signage are outlined later in section 7.9.

Promotional Activities

It is recommended the marketing programme make provision for the following promotional activities, in conjunction with Fáilte Ireland, Tourism Ireland and relevant agencies:

- **Media advertising campaign** driven by Fáilte Ireland and Tourism Ireland including design of specific advertising material
- **Trade and consumer promotions** advertising with key markets including: Day visitors from domestic market; specialist day and overnight visitors – cruising, game and coarse fishing, canoeing, kayaking, cycling, bird-watching in key identified markets (see chapter 2).
- **Familiarisation trips** for media and overseas walking and cycling groups
- Development of *Great Southern Mountain Park* branded **information racks** for use in accommodation and attractions within the Park which would include information on the range of things to see and do in the area.
- Attend **trade workshops** in Ireland
- Representation in market **consumer events and shows**
- Increase tourism product inventory on **tour operator and online travel agent sites**
- **Merging of customer databases** within the area for online promotions
- **Increased and coordinated marketing** of the existing festivals and events within the area capitalising on the success of walking festivals, the St Declan's Way event and the Comeraghs Wild **Festival**.
- **Social media advertising** to drive traffic to Facebook page; promotional videos on Youtube

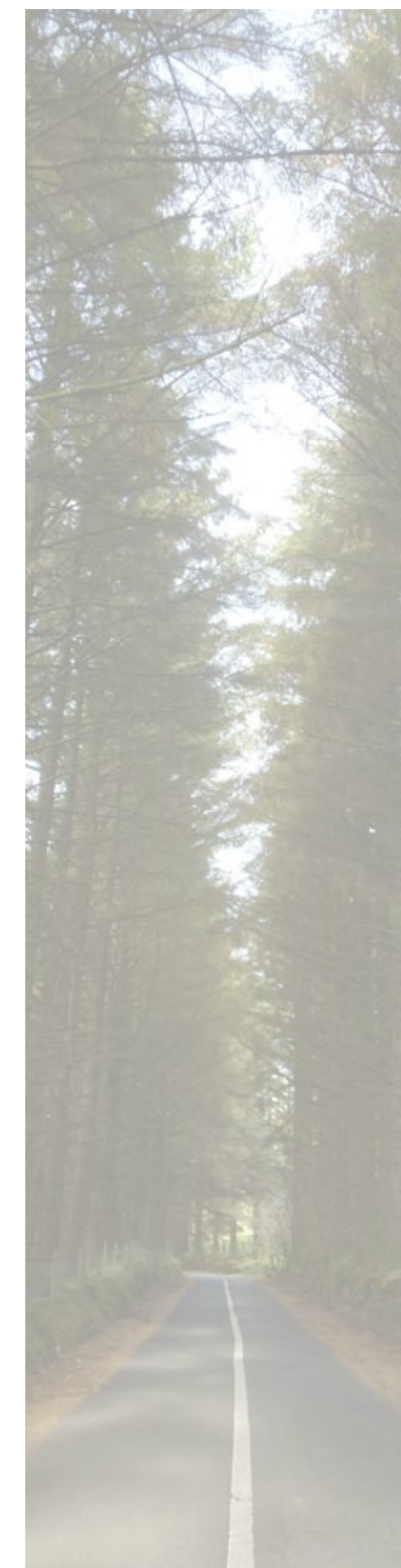


- Development of **experiential offers** for use on www.discoverireland.com
- Depending on budget consider **targeted outdoor advertising, radio & TV advertising** in key target markets.
- Development of a new **Great Southern Mountain Park Festival** over a two week period in the main summer season with each of the four mountain areas being the main focus for a number of days. This project should showcase the *Great Southern Mountain Park* as a unique destination of built, archaeological, cultural and activity excellence. The event should include open access to heritage attractions and a series of free activity taster sessions including mountain-biking, hiking, angling, kayaking etc under the 'Get Out There' brand. It is expected that this festival would be delivered through an external marketing/management agency.



Programme 5: Marketing and Promotion						
Action	Lead Agency	Partners	Timescale	Target Audience	Key Performance Indicator (KPI)	Estimated Cost
Brand Identity						
Commission logo for the <i>Great Southern Mountain Park</i>	Appointed external marketing agency	GSMP Destination Partnership Tourism Development Group	Year 1	All visitors	Logo developed	€ 6,000
Print Media						
Commission print media strategy	GSMP Destination Partnership Manager	Fáilte Ireland	Year 1-2			€ 100,000
Design, print and distribute a <i>Great Southern Mountain Park</i> visitor map. Map is required to be available in print, digitised and interactive version for use online.	Appointed external marketing agency	GSMP Destination Partnership Tourism Development Group OPW Coillte NPWS Local community	Year 1	All visitors	Visitor map developed and widely available	€ 20,000

Develop pocket guide to walking and cycle routes in the <i>Great Southern Mountain Park</i> .	Appointed external marketing agency	GSMP Destination Partnership Tourism Development Group GSMP Destination Partnership Recreation Development Group Rural Recreation Officers Leave No Trace OPW Coillte Local community	Year 2-3	All visitors	Pocket Guide developed	€ 7,000
Produce banners and posters for the <i>Great Southern Mountain Park</i>	Appointed external marketing agency	GSMP Destination Partnership Tourism Development Group	Year 2-3	All visitors	Banner and posters developed	€ 6,000
Digital Strategy						
Commission a digital strategy for the <i>Great Southern Mountain Park</i>	GSMP Destination Partnership Manager	GSMP Destination Partnership Tourism Development Group	Year 2-3	All visitors	Digital strategy commissioned	€ 15,000
Develop a dedicated website for the <i>Great Southern Mountain Park</i> with a link on the www.discoverireland.ie and www.ireland.ie websites with embedded video, downloadable visitor maps, trail route maps, itineraries, and the ability for visitors to book accommodation, activities and bundles.	Appointed external marketing agency	GSMP Destination Partnership Tourism Development Group	Year 2-3	All visitors	Website developed	€ 15,000
Include and optimise information on tourism products and activities in the <i>Great Southern Mountain Park</i> on www.discoverireland.com	GSMP Destination Partnership Tourism Development Group	Fáilte Ireland	Year 1-2	All visitors	Information added to www.discoverireland.ie and optimised	
Create a Facebook page, Instagram account and a Twitter account for the <i>Great Southern Mountain Park</i> .	GSMP Destination Partnership Tourism Development Group		Year 2-3	All visitors	Facebook, Instagram and Twitter account operational	
Develop a smartphone application for <i>Great Southern Mountain Park</i>	GSMP Destination Partnership Tourism Development Group	GSMP Destination Partnership Fáilte Ireland Tourism Ireland	Year 3	All visitors	Smartphone app developed	
Investigate use of Storymap or similar for collation of intangible stories.	Appointed external marketing agency	GSMP Destination Partnership Tourism Development Group	Year 2-3	Culturally Curious	Use of Storymap or similar investigated	

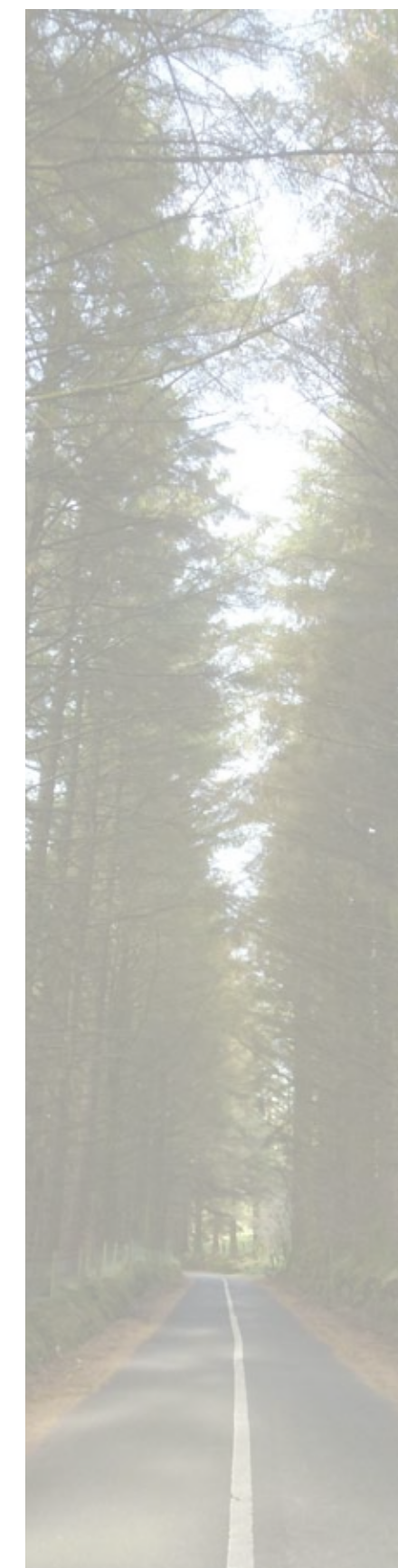




Get Out There Centres						
Develop Primary Get Out There Centres at Cashel, Mitchelstown, Cahir, Clonmel, Dungarvan, Mallow and Tipperary.	Fáilte Ireland	GSMP Destination Partnership Tourism Development Group	Year 2-3	All visitors	Get Out There Centres developed at Primary Destination Gateways	
Develop Secondary Get Out There Centres at Kilmallock, Kilfinane, Ballymacarbry, Doneraile, Lisvarriane, Carrick on Suir and Lismore.	GSMP Destination Partnership Tourism Development Group	Fáilte Ireland	Year 3-4	All visitors	Get Out There Centres developed at Secondary Destination Gateways	
Promotional Activities						
Initiate targeted media advertising campaign including design of iconic experiences advertising	Appointed external marketing agency	GSMP Destination Partnership Tourism Development Group	Year 2-3	All visitors	Media advertising campaign initiated	€ 25,000
Initiate trade and consumer promotions	Fáilte Ireland	GSMP Destination Partnership Tourism Development Group	Year 2-4	All visitors	Trade and consumer campaigns initiated	€ 25,000
Initiate familiarisation trips	Fáilte Ireland	GSMP Destination Partnership County Councils	Year 2-4	Walking, cycling and angling groups the island of Ireland, UK, Germany, France and Netherlands. Media	Familiarisation trip initiated	€ 15,000
Develop <i>Great Southern Mountain Park</i> branded information racks for use in businesses within the Park (Target 20-25 businesses for participation.)	Appointed external marketing agency	GSMP Destination Partnership Tourism Development Group County Councils	Year 2-4	All visitors	Branded information racks available in accommodation and attractions	€ 3,000
Attend trade workshops in Ireland	GSMP Destination Partnership Tourism Development Group		Years 2-10	All visitors	Trade workshops attended	€ 45,000
Attend in-market consumer events and trade shows	GSMP Destination Partnership Tourism Development Group	Fáilte Ireland	Years 2-10	All visitors	In-market consumer events and trade shows attended	€ 35,000

Increase tourism product inventory on tour operator and online travel agent sites	Appointed external marketing agency	Fáilte Ireland	Years 2-10	All visitors	Tourism product inventory increased on www.discoverireland.com	GSMP
Advertise on social media to drive traffic to Facebook page and place promotional videos on Youtube	Appointed external marketing agency	Fáilte Ireland	Year 2-3	All visitors	Social media advertising undertaken	€ 5,000
Develop experiential offers for use on www.discoverireland.com	Appointed external marketing agency	Fáilte Ireland	Year 1	All visitors	Experiential offers developed for use on www.discoverireland.com	€ 25,000
Consider focussed targeted outdoor advertising, radio and TV advertising in key target markets	Appointed external marketing agency	Fáilte Ireland Tourism Ireland	Year 4-10	All visitors	Large scale advertising programme undertaken	€ 100,000
Investigate opportunity to merge customer databases within the area to enable scaled online promotion.	Appointed external marketing agency	GSMP Destination Partnership Tourism Development Group	ShortYear 1-2	All visitors	Customer databases merged into one common database for online promotions	GSMP
Coordinate promotion of current festivals and events within the <i>Great Southern Mountain Park</i> area.	Appointed external marketing/management agency	GSMP Destination Partnership Tourism Development Group	Year 2-3	All visitors	Promotion of festivals and events coordinated	GSMP
Develop a new <i>Great Southern Mountain Park</i> Festival over a two-week period	Appointed external marketing/management agency	GSMP Destination Partnership Tourism Development Group	Year 2-4	All visitors and local community	<i>Great Southern Mountain Park</i> Festival running	€ 10,000

Great Southern Mountain Park Manager = GSMP



7.6 Programme Six: Collaboration and Linkages

The philosophy behind this programme is that tourism businesses and recreation providers are more successful working together in partnership than as stand-alone enterprises; cooperative competition or co-opetition as it has been termed.

Elements of this programme include:

- **Business familiarisation** includes developing business provider's knowledge of current tourism and recreational opportunities associated provided within the *Great Southern Mountain Park* in order to better promote the area to visitors. As well as encouraging the accommodation sector to take part in the Walkers Welcome/Cyclists/Anglers Welcome initiative discussed earlier all Park-based accommodation could have information on bike hire and timetables of local train and bus services. This element of this programme is also linked to the earlier initiative (section 6.5) to install a branded brochure racking system with information on local businesses into pubs/accommodation/restaurants/visitor attractions within the *Great Southern Mountain Park*.
- **Bundling** includes combining activities together e.g. walking, cycling, kayaking and facilitating visitors in booking these activities in combination with accommodation and travel arrangements, building their own itinerary - a tailor made experience. This was also mentioned earlier in relation to the website earlier in section 7.5 and the 'Great Days Out' packages promoted by heritage centres in section 7.3. Hotels, ITOA, coach tours and other accommodation should be able to offer activity packages within the *Great Southern Mountain Park* area. Bike hire companies should be able to offer maps of local food and craft. Examples of such packages would be:

- **Great Southern Mountain Park MTB Experience** which includes accommodation + bike hire with Trailriders at Ballyhoura Forest + optional transport
- **Great Southern Mountain Park Angling Experience** which includes accommodation + optional tackle hire + optional guide at a variety of locations + optional transport
- **Great Southern Mountain Park Walking Experience** which include accommodation + maps of specific walks + optional guide at a variety of locations + optional transport
- **Great Southern Mountain Park Historic Towns Experience** which includes accommodation + maps of historic town walks + optional guide + optional transport
- **Great Southern Mountain Park Castles Experience** which includes accommodation + entry to several castles (need confirmation by OPW) + optional transport
- **Great Southern Mountain Park Gardens Experience** which includes accommodation + tour of local gardens

There are many options which could be pursued. Common to all would be the ability to book via a website, provision of a visitor map and ability to book a variety of options.

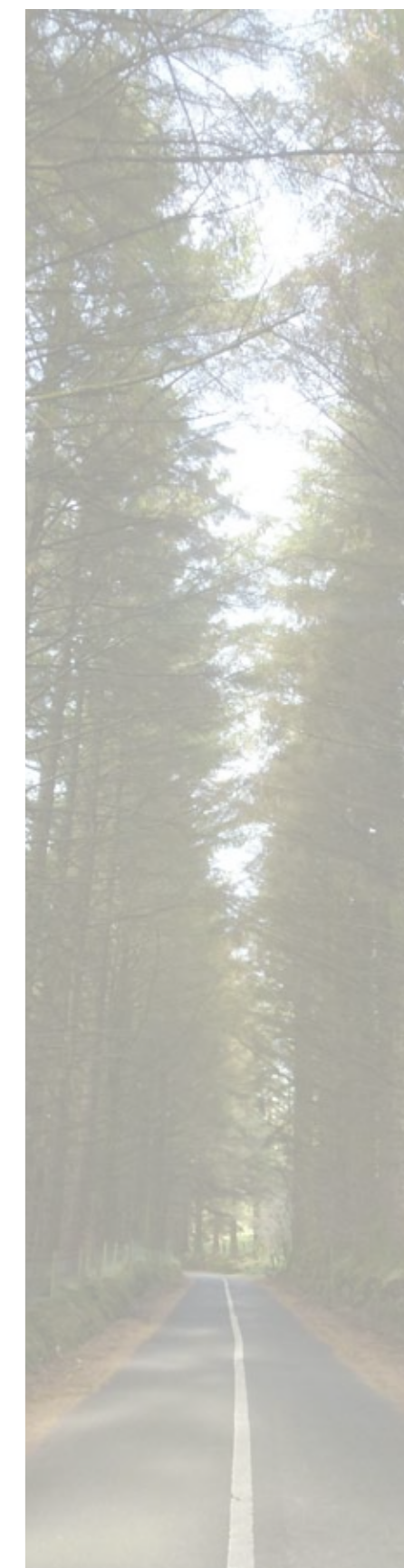
- Businesses in the tourism sector could be invited to take place in **familiarisation visit** to the Burren & Cliffs of Moher Geopark to identify best-practice in developing linkages at a community level and cooperative marketing initiatives.
- To encourage collaboration between accommodation providers a **baggage transfer** service could be offered between different accommodation to enable people to walk or cycle from one to another.

To encourage **partnership development** between all community based recreation and tourism organisations in the *Great Southern Mountain Park* area, e.g. Knockmealdowns Active, Knockmealdowns Forum, Visit Ballyhoura, Comeragh Mountains Forum, Galtee Partnership, it is proposed that a series of inter-area familiarisation walks are undertaken with an event taking place at the same time to offer an opportunity for collaboration and networking.



Programme 6: Collaboration and Linkages						
Action	Lead Agency	Partners	Timescale	Target Audience	Key Performance Indicator (KPI)	Estimated Cost
Organise training and familiarisation days for tourism business providers within the GSMP area to increase awareness of products on offer in the GSMP area.	GSMP Destination Partnership Tourism Development Group	Accommodation sector Activity providers Attractions	Year 1-2	Accommodation sector Activity providers Attractions	Tourism businesses able to recommend a wide range of things to do in the GSMP area with confidence.	€ 2,000
Develop bundling options for visitors to tailor make itineraries and make information available on a dedicated website.	GSMP Destination Partnership Tourism Development Group	Accommodation sector Activity providers	Year 2-4	All visitors	Visitors able to tailor make their own itineraries on a dedicated website.	GSMP
Organise familiarisation visits for tourism businesses in the GSMP area to Burren & Cliffs of Moher to learn about their approach to collaboration and co-operation.	GSMP Destination Partnership Tourism Development Group	Accommodation sector Activity providers Attractions Burren & Cliffs of Moher Geopark	Year 1	Accommodation sector Activity providers Attractions	Familiarisation visit to the Burren & Cliffs of Moher takes place.	€ 3,000
Investigate optimum means of provision of a one way baggage transfer service between destinations & accommodation for walkers and cyclists. This could include consideration of various options such as a one-way bike drop off for cyclists. This could be piloted in the area with the highest demand.	GSMP Destination Partnership Tourism Development Group	Accommodation sector Activity providers	Year 1	All visitors	One way baggage/bike transfer service operational in pilot area.	GSMP
Encourage partnership development through familiarisation visits for members of each community based recreation organisation in each of the four mountain areas to each other's mountain area.	GSMP Destination Partnership Tourism Development Group	Knockmealdowns Active Konockmealdowns Forum Visit Ballyhoura Comeragh Mountains Forum Galtee Partnership	Year 1	Members of each organisation	Walks and event planned for all tourism and recreation management organisations.	GSMP

Great Southern Mountain Park Manager = GSMP



7.7 Programme Seven: Community Involvement

The goal of this project is to make this destination a better place to live in and a better place to visit. While it is important that this area offers visitors a range of things to see and do it is also important that the visited – the local communities in the area benefit directly from visitor expenditure contributing to a sustainable rural economy.

Crucial to the success of this project will be multi-stakeholder engagement including host communities in decision-making with regards to the development of the *Great Southern Mountain Park*. Engagement with the community must offer them the opportunity to contribute to decision making; form linkages with neighbouring communities; offer ideas and solutions regarding destination development.

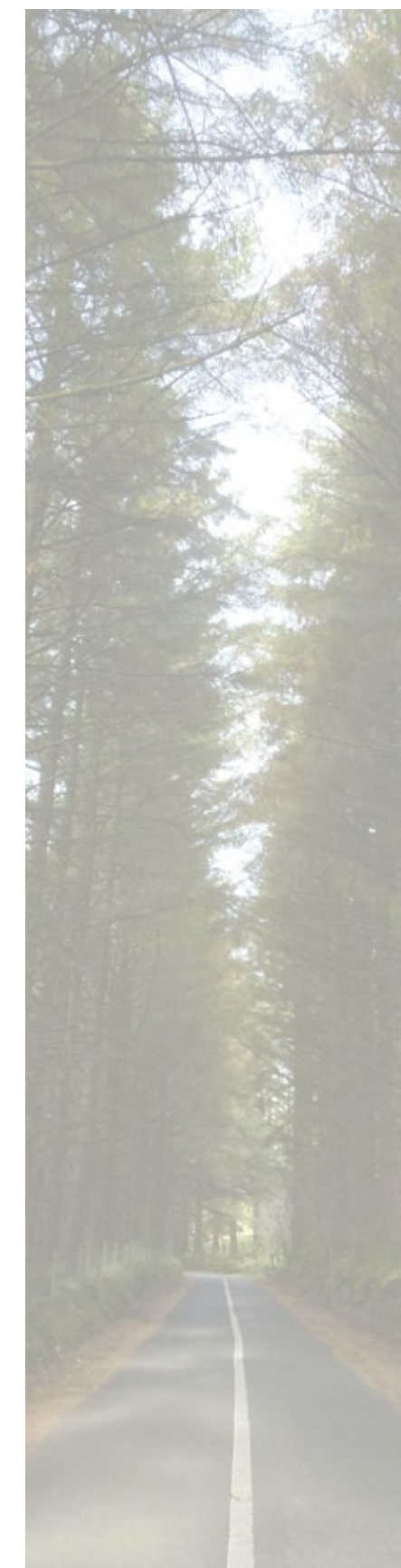
Actions proposed include the following:

- Online **Community Information Campaign** to inform local communities about and involve local communities in the *Great Southern Mountains Park* project and invite opinions;
- **Community Council** as part of the destination management of the Park drawn from local residents and operators of attractions, accommodation and activities to ensure the development of the Park reflects the local communities' wishes.
- **Community Ambassadors** to contribute to the core theme of this area as 'A Welcoming Place'. These will work with Fáilte Ireland and group tours to facilitate and welcome visitors, particularly in peak season.
- **Local Familiarisation Initiative** – offering local residents free or reduced costs to local attractions and for participation in local activities so they can encourage friends and family to visit or participate.

- **Volunteer Plan** to coordinate community volunteers who wish to engage in event management, trail repair, education programmes, guiding, fund-raising
- **Great Southern Mountain Park Guides** – local people who are experts in the local history, flora & fauna, walking, cycling etc who can be added to a panel of trained and paid guides for the area and who can give visitors an authentic personal experience. Actions regarding training for guides are outlined in section 7.8 regarding Training and Development.
- **Great Southern Mountain Park Pride of Place Award** – celebrating distinctive communities and reinforcing a sense of place.
- **Involvement of Tidy Towns Committees** to identify significant local projects that could improve the character of their towns contributing to increased community pride and sense of place (action regarding this included in section 7.3).



Programme 7: Community Involvement						
Action	Lead Agency	Partners	Timescale	Target Audience	Key Performance Indicator (KPI)	Estimated Cost
Initiate Community Information Campaign to inform and invite opinion	GSMP Destination Partnership Community Development Group	County Councils	Year 1	Local community	Community Information Campaign underway	
Establish Community Council	GSMP Destination Partnership Steering Group	County Councils	Year 1	Local community	Community Council established	
Select Community Ambassadors	GSMP Destination Partnership Community Development Group	Fáilte Ireland	Year 1-4	Local community All visitors	Community Ambassadors selected	
Undertake Local Familiarisation Initiative	GSMP Destination Partnership Community Development Group	Accommodation sector Activity providers Attractions	Year 1-4	Local community	Local Familiarisation Initiative underway	
Produce Volunteer Plan for coordination of community volunteers	Rural Recreation Officers	GSMP Destination Partnership	Year 1-2	Local community	Volunteer Plan produced	
Set up core panel of <i>Great Southern Mountain Park</i> Guides	GSMP Destination Partnership Community Development Group	Fáilte Ireland	Year 1-2	Local community All visitors	<i>Great Southern Mountain Park</i> Guides panel selected	
<i>Great Southern Mountain Park</i> Pride of Place Award	GSMP Destination Partnership Community Development Group	Local Authorities Identified sponsor	Year 3-4	Local community	First <i>Great Southern Mountain Park</i> Pride of Place Award given to a town or village	



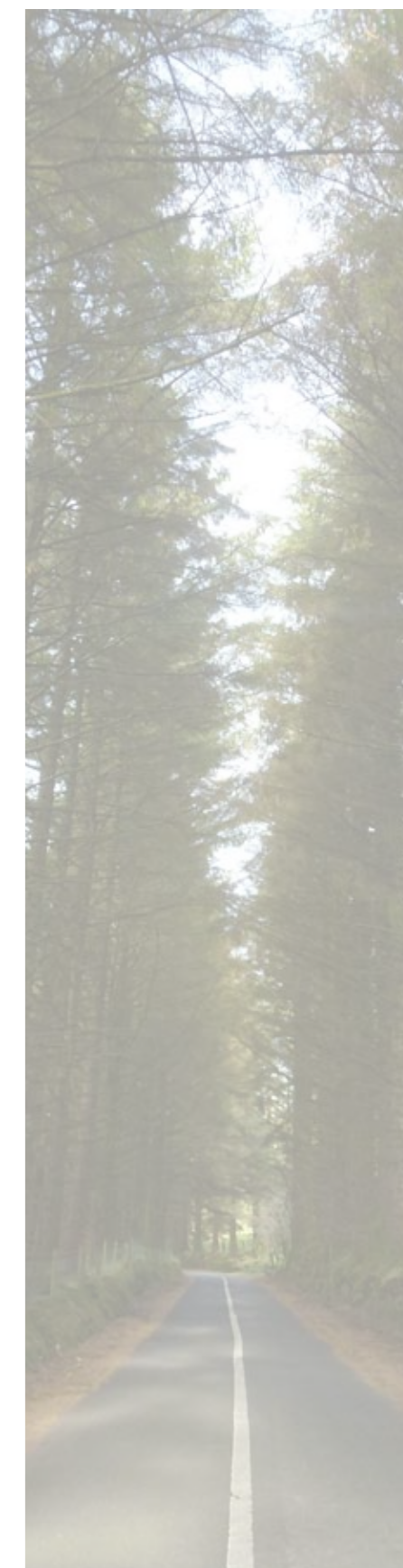
7.8 Programme Eight: Training & Development

The focus for this programme is on maximising the ability of the people working in the area to learn from best-practice elsewhere and to 'raise their game' by availing of the training and development opportunities available. Measures include:

- Encouraging tourism businesses to avail of **training programmes** offered by Fáilte Ireland
- Encouraging tourism businesses to join Green Hospitality Programme or other similar **accreditation scheme** so that the area can be promoted as a responsible tourism destination
- Ensuring there are **equal opportunities** for employment, career development and capacity building in the local tourism industry
- Offering support for **business creation and development**
- Organising **familiarisation visits** for tourism businesses in the GSMP area to Burren & Cliffs of Moher to learn about their approach to collaboration and cooptition (see section 7.6 for action detail)
- Offer **training** for selected *Great Southern Mountain Park* Guides (see also section 7.8)



Programme 8: Training & Development						
Action	Lead Agency	Partners	Timescale	Target Audience	Key Performance Indicator (KPI)	Estimated Cost
Encouraging tourism businesses to avail of training programmes	GSMP Destination Partnership Tourism Development Group	Faillte Ireland	Year 1-2	Local tourism businesses	Information on available training programmes sent to targeted businesses	
Encouraging tourism businesses to join Green Hospitality Programme or other similar accreditation scheme	GSMP Destination Partnership Tourism Development Group	Fáilte Ireland Green Hospitality Programme Green Tourism Business Scheme Ecotourism Ireland	Year 1-10	Local tourism businesses	Annual increase in % of tourism businesses accredited	
Ensuring there are equal opportunities for employment, career development and capacity building	GSMP Destination Partnership Community Manager	Fáilte Ireland	Year 1-10	Local tourism businesses	Guidelines for equal opportunities issued to local tourism businesses	
Offering support for business creation and development within the GSMP boundary	Fáilte Ireland	GSMP Destination Partnership Community Development Group	Year 1-10	Local tourism businesses	Support offered for business creation and development	
Offer training programmes for <i>Great Southern Mountain Park</i> Guides	Fáilte Ireland	GSMP Destination Partnership Community Development Group	Year 1-2	Local guides	Local guides taking part in training programmes	



7.9 Programme Nine: Education & Information

The purpose of this programme is to:

- **Inform local residents and visitors** of the location of attractions, facilities and services through well-placed, appropriate signage using a common design and standard.
- **Use interpretation to raise awareness** of the natural, built and cultural heritage within the *Great Southern Mountain Park*. The wider purpose of the latter measure is to both generate a desire for protection, by local residents and visitors through an understanding of what there is to protect; and inform, educate and enthuse visitors and local residents and to drive visitors to local attractions. Involvement of the local community in the development of interpretative signage could also be considered so as to engender a greater sense of ownership.
- **Reduce recreational user conflict and impacts** through a Code of Conduct for use of walking and cycling trails that will be included in promotional maps, apps and brochures as well as signage.
- **Reduction of environmental impacts** through use of the Leave No Trace programme. Use of Leave No Trace principles is proposed for inclusion on appropriate signage, along with a specific code of conduct to reduce user impacts. See also section 7.10 regarding Responsible Tourism.

- **Capitalise on educational potential** of the geology, built heritage, cultural heritage, caves and language through the investigation and implementation of school and community engagement initiatives. Many heritage attractions already have education packs and this concept could be extended to other places and to other subject areas such as nature walks, themed trails etc. The development of education programmes could be undertaken in conjunction with Cahir Castle, Mitchelstown Caves and other heritage attractions. There is also growing demand for learning/experiential holidays for people of all ages which could be linked to this area.

Types of Signage: There are generally three types of signage: orientation, interpretative and directional.

- **Orientation signs** i.e. 'you are here' map type signs indicate the locations of sites of interest relative to a visitor's current position. The primary objective of the orientation sign is to help the visitor identify where they are and help them plan their journey through a combination of text and map information. Orientation signs should be positioned on footpaths where the visitors will most likely begin their journey i.e. within Primary and Secondary Destination Gateway. It should be positioned so that there will be no ambiguity over its purpose and will therefore be of optimum use.
- **Directional signs** i.e. finger signs guiding visitors to and from sites of interest. Directional signs should be located at any decision points to help avoid any confusion i.e. road junctions, trail turn-offs and along straight sections of walking and cycling trails to ensure visitors do not get lost or confused as to which direction they should take. Visitors are familiar with the white on brown tourist signs and these should be used to both raise the profile of the *Great Southern Mountain Park* and to define its boundaries. Before a signage programme is undertaken there should be a thorough audit of existing directional and other signage associated with the Park.

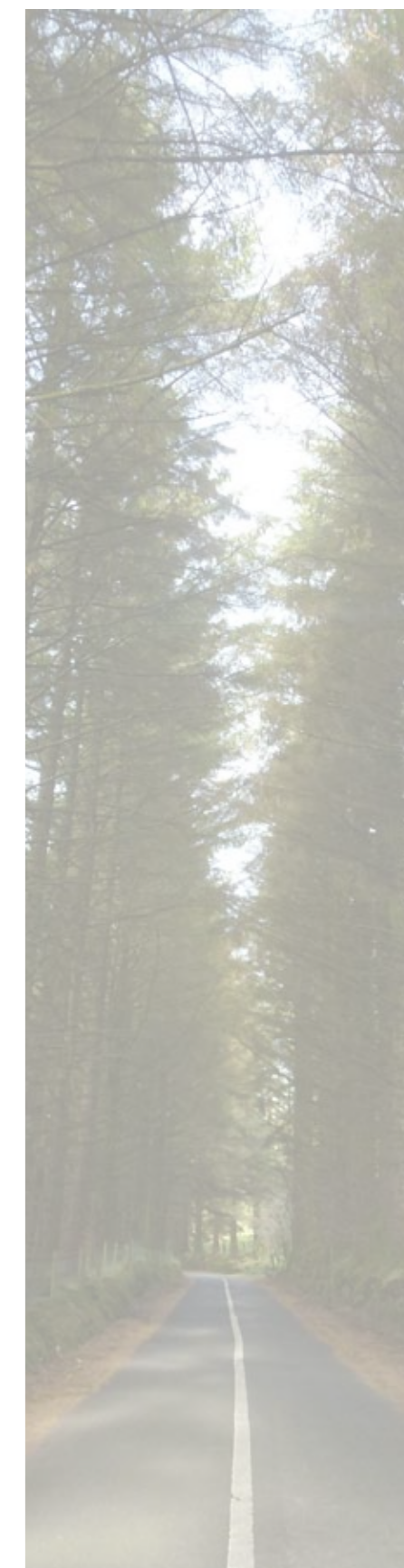
- **Interpretative signs** i.e. to give the visitor interpretive information relating to a particular attraction or location.

There are a number of reasons for developing a recognisable and common template for signage within the *Great Southern Mountain Park*.

- **Appreciation and Interpretation:** Much of what is of interest to visitors may not be well interpreted or made accessible to them. There is a strong need to identify the sites/points of interest and interpret natural cultural and built heritage so that visitors gain a full appreciation of the area.
- **Familiarity and Trust:** Once the visitor becomes familiar with the signs (their colours, type styles, format etc.) they can move from one part of the Park to the next and easily follow other signs. This will help avoid confusion and the need to ask for assistance. If the visitor comes to trust the signs they will be more likely to follow further signs without worrying about losing their way.
- **Clarity and Coherence:** If all appropriate attractions within a given area are signed, and done so coherently, the tourist will be more likely to continue to explore the locality. A clear layout and sign arrangement will reduce confusion and lead to a smooth progression from sign to sign, destination to destination.
- **Economic Sense:** The better the experience a visitor has of the *Great Southern Mountain Park*, the more likely they are to either return or to recommend the area to someone else, and the longer the visitor spends exploring the area, the more likely they are to contribute to the local economy. With such a signage system in place, tourists that had originally not intended visiting heritage sites may well be inclined to do so.

Programme 9: Education & information						
Action	Lead Agency	Partners	Timescale	Target Audience	Key Performance Indicator (KPI)	Estimated Cost
Commission an audit of existing signage, requirements for new signage; develop a common design for signage; and install new directional, orientation and interpretative signage where required.	GSMP Destination Partnership Manager Commissioned external company	National Trails Office Local Authorities Key Sponsor	Year 1	All visitors	Signage Audit commissioned Signage template designed Signage installed	GSMP
Develop a <i>Great Southern Mountain Park</i> Code of Conduct for use on promotional material, apps and signage	GSMP Destination Partnership Recreation Development Group	National Trails Office	Year 1	Hard & Soft adventure Great Escapers	Code of conduct developed and incorporated in promotional material, apps and signage	GSMP
Include Leave No Trace principles on promotional material, apps and signage	GSMP Destination Partnership Recreation Development Group	Leave No Trace	Year 1-2	Hard & Soft adventure Great Escapers	Leave No Trace principles incorporated in promotional material, apps and signage	
Develop education programmes in conjunction with key heritage attractions	GSMP Destination Partnership Recreation Development Group	GSMP Destination Partnership Key heritage attractions NPWS Coillte	Year 1-3	Primary, secondary and tertiary students Culturally Curious	Education material developed	

Great Southern Mountain Park Manager = GSMP





7.10 Programme Ten: Responsible Tourism

Responsible travel can take many forms and different destinations and stakeholders will have different priorities with issues differing from place to place. However responsible tourism can be said to have the following common characteristics wherever it is pursued:

- **minimises negative economic, environmental and social impacts;**
- generates **greater economic benefits for local people** and enhances **the wellbeing of host communities, improves working conditions and access to the industry;**
- **involves local people in decisions** that affect their lives and life changes;
- makes **positive contributions to the conservation** of natural and cultural heritage, to the maintenance of the world's diversity;
- provides more enjoyable experiences for tourists through more **meaningful connections** with local people, and a **greater understanding** of local cultural, social and environmental issues;
- provides **access** for physically challenged people;
- culturally sensitive, engenders **respect** between tourists and hosts, and builds **local pride** and confidence.

Responsible Tourism can be regarded as behaviour. It is more than a form of tourism as it represents an approach to engaging with tourism, be that as a tourist, a business, and locals at a destination or any other tourism stakeholder. It emphasises that all stakeholders are responsible for the kind of tourism they develop or engage in. All forms of tourism and all people involved in tourism including tour operators, central & local government, accommodation owners, activity & attraction operators, journalists & tourists, can be more responsible.

Whilst different groups will see responsibility in different ways, the shared understanding is that responsible tourism should entail an improvement in tourism. Tourism should become 'better' as a result of the responsible tourism approach. Within the notion of betterment resides the acknowledgement that conflicting interests need to be balanced. However, the objective is to create better places for people to live in and to visit.

The concept of the *Great Southern Mountains Park* and the programmes outlined above all aim to make the destination a better place to live in and a better place to visit and is designed to contribute to sustainable rural socio-economic development. The focus of the *Great Southern Mountain Park* development programme on communities, built cultural and natural heritage, and low impact tourism including walking and cycling is designed with the key principles of responsible tourism, as outlined above, in mind.

There are many areas where the action plan for the *Great Southern Mountain Park* has responded the characteristics of responsible tourism as defined above. These actions are:

Minimising negative economic, environmental and social impacts

- Promotion of walking, cycling and kayaking as low impact activity tourism (section 7.2)
- Development of angling wash-off areas to reduce transfer of alien species (7.2)
- Promotion of bio-security issues with anglers (programme 7.2)
- Identify targeted measures in which the Annewstown and Bunmahon Blue Flag beaches can be upgraded to maximise their appeal to visitors. (7.3)
- Investigate the optimum sustainable means of transferring people between accommodation providers and hubs within the GSMP (7.4)

- Identify ways in which significant built heritage can be better linked to the adventure product e.g., walking and cycle trails and implement. (7.4)
- Investigate optimum means of provision of a one way baggage transfer service between destinations & accommodation for walkers and cyclists. This could include consideration of various options such as a one-way bike drop off for cyclists. This could be piloted in the area with the highest demand. (7.6)
- Encouraging tourism businesses to join Green Hospitality Programme or other similar accreditation scheme (7.8)
- Develop a *Great Southern Mountain Park* Code of Conduct for use on promotional material, apps and signage (7.9)
- Include Leave No Trace principles on promotional material, apps and signage (7.9)

Generating greater economic benefits for local people and enhances the wellbeing of host communities, improves working conditions and access to the industry

- Establishment of a *Great Southern Mountain Park* Development Partnership with inclusion of local community representatives (7.1 and 7.7)
- Design, print and distribute a *Great Southern Mountain Park* visitor map. Map is required to be available in print, digitised and interactive version for use online. (7.5)
- Develop a dedicated website for the *Great Southern Mountain Park* with a link on the www.discoverireland.ie and www.ireland.ie websites with embedded video, downloadable visitor maps, trail route maps, itineraries, and the ability for visitors to book accommodation, activities and bundles. (7.5)
- Develop Primary Get Out There Centres at Cashel, Mitchelstown, Cahir, Clonmel, Dungarvan, Mallow and Tipperary. (7.5)

- Develop bundling options for visitors to tailor make itineraries and make information available on a dedicated website. (7.6)
- Set up core panel of *Great Southern Mountain Park* Guides (7.7)
- Offer training programmes for *Great Southern Mountain Park* Guides (7.8)
- Encouraging tourism businesses to avail of training programmes (7.8)

Involving local people in decisions that affect their lives and life changes

- Initiate Community Information Campaign to inform and invite opinion (7.7)
- Establish Community Council (7.7)

Making positive contributions to the conservation of natural and cultural heritage, to the maintenance of the world's diversity

- Use of interpretation to develop an increased level of understanding, awareness and appreciation among visitors and local residents of local natural, built and cultural heritage. As recognised author on interpretation Fred Tilden said *'Through interpretation we get understanding, through understanding we get appreciation and through appreciation we get protection.'*¹ (7.9)

Providing more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social and environmental issues

- Investigate opportunity to develop food and craft trails in the GSMP using Trailkilkenny's trails as an example (7.3)

- Encourage accommodation providers to use local food producers and to highlight this on their websites and menus.
- Define nature walks and promote flora and fauna through signage and information. (7.3)
- Identify wildlife viewing opportunities within the GSMP boundary and optimum location for nature walks and associated signage (7.3)
- Investigate use of Storymap or similar for collation of intangible stories. (7.5)
- Develop a new *Great Southern Mountain Park* Festival over a two-week period (7.5)
- Develop education programmes in conjunction with key heritage attractions (7.9)

Providing access for physically challenged people

- Commission accessibility audit and drive increased accessibility at visitor attractions where possible (7.4)
- Ensuring there are equal opportunities for employment, career development and capacity building (7.8)

Culturally sensitive, engenders respect between tourists and hosts, and builds local pride and confidence:

- Tidy Towns Committees to identify significant local projects that could improve the character of their towns. These projects to be prioritised in terms of impact and achievability. (7.3)

The Action Plan Programmes have covered many of issues related to responsible tourism however there are two which can be included separately here. These are visitor monitoring and monitoring progress.

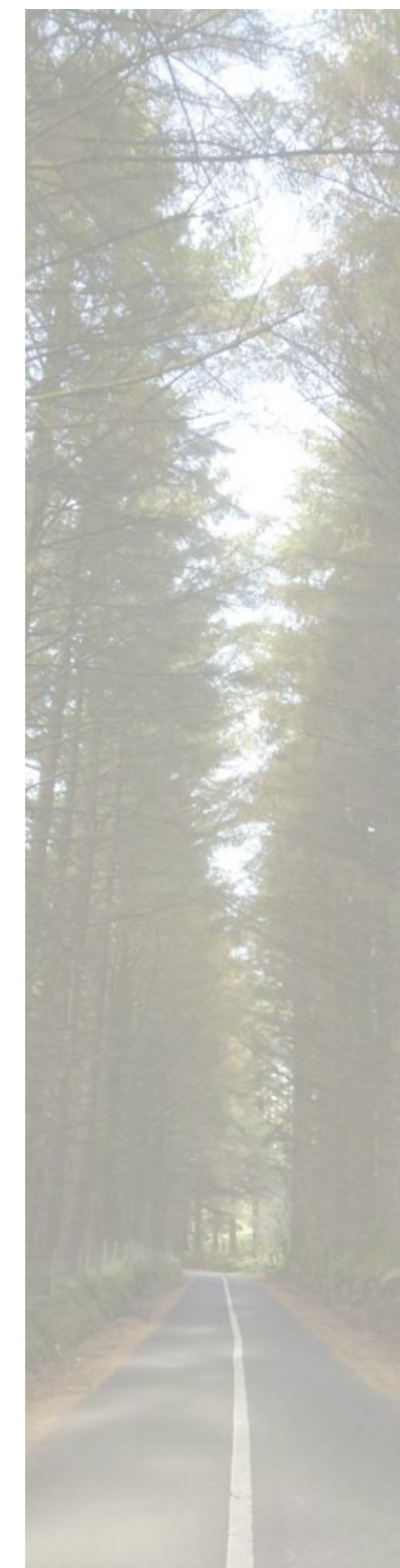
- **Visitor monitoring** - This can be divided into three separate elements; *numeric data collection*, *physical impact* (impacts on the physical environment) and *social impact* (impacts on human social conditions at sites) monitoring. It is recommended a visitor monitoring plan be prepared for the *Great Southern Mountain Park* including a range of measures to monitor visitor numbers such as the installation of track counters; and measures to monitor carrying capacity in sensitive areas including identification of physical impacts (e.g. Limits of Acceptable Change). It is important that a baseline survey be carried out as soon as possible in priority areas to create data on which to base future surveys.

- **Monitoring Progress:** Indicators of progress can help achieve goals, provide an indicator of success and allow continuous improvement. The Burren & Cliffs of Moher Geopark² is taking part in a pilot programme for the European Tourism Indicator System for the Sustainable Management of Destinations (ETIS)³ to monitor and measure performance and is one of 100 destinations in Europe that are currently piloting this system. The European Tourism Indicator System is specifically intended for tourism destinations.

- It is designed as a locally owned and led process for monitoring, managing, and enhancing the sustainability of a tourism destination. The System is made up of a set of Indicators, a Toolkit, and a Dataset. It is drawn up as an instrument that any destination can pick up and implement without any specific training. It can be a useful way to track destination performance and make better management decisions, as well as influence adequate policies.

² <http://www.wttc.org/tourismfortomorrow/winners-finalists/2014-winners-finalists/burren-and-cliffs-of-moher-geopark/>

³ http://ec.europa.eu/enterprise/sectors/tourism/sustainable-tourism/indicators/index_en.htm

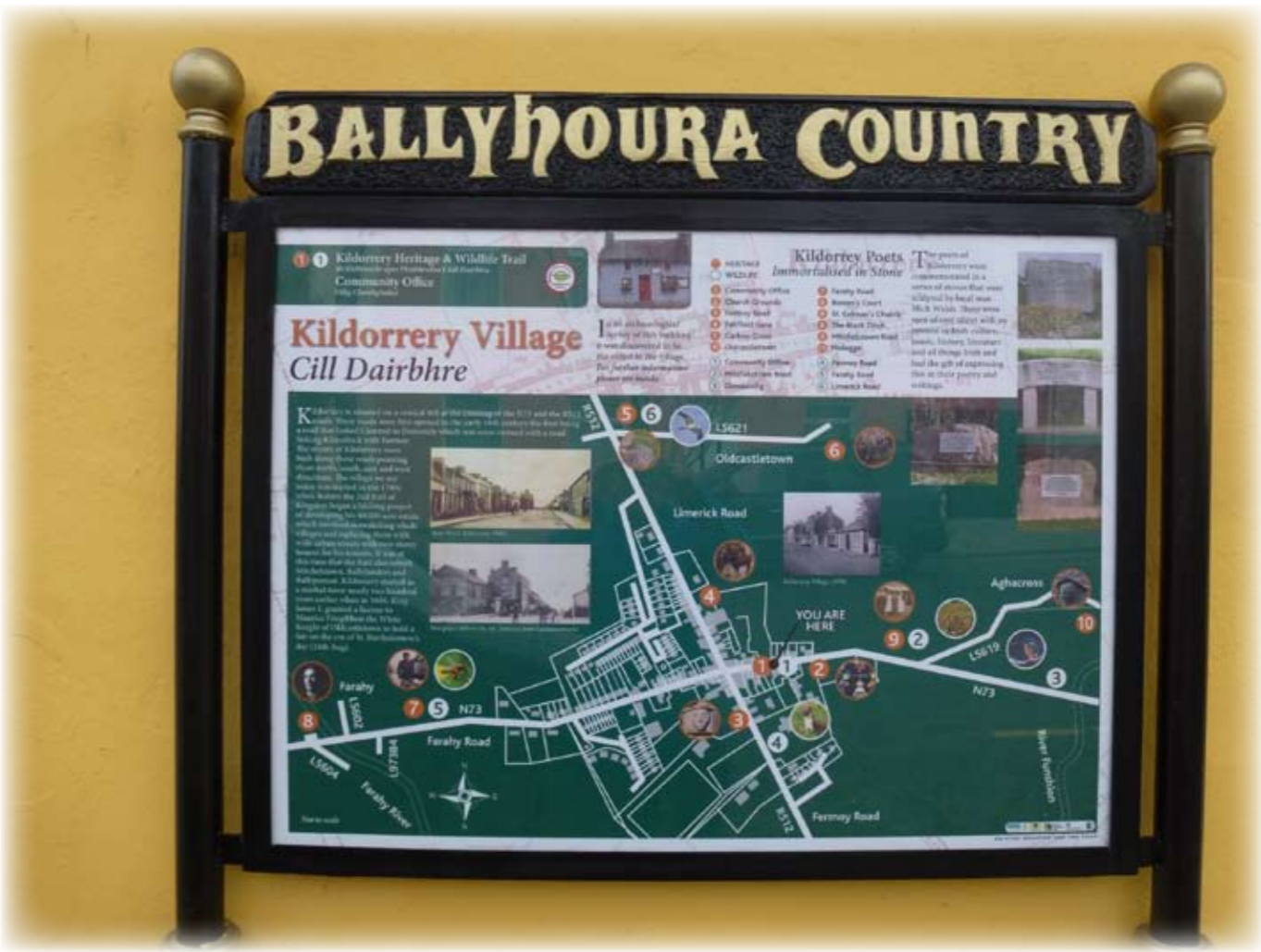


¹ Fred Tilden, *Interpreting Our Heritage*, 1957



- The present System has a structure of 27 core and 40 optional indicators. These can be used on a voluntary basis, together or integrated into existing destination monitoring systems. The System is flexible. It can be expanded or contracted to meet the needs of the destination, the interest of local stakeholders, and the specific sustainability issues that the destination faces. The basic principle of the Indicator System is that destination responsibility, ownership, and decision-making is shared. Engaging a group to come together and work together to collect and report information is a powerful way to undertake effective destination management.
- Fáilte Ireland has expressed interest in using the Geopark's work on the ETIS as a pilot for assessing for larger-scale, national projects.

While a responsible tourism approach makes sense from an environmental, social, economic and visitor satisfaction perspective it also makes commercial sense in that a well managed and responsible destination can win awards such as the European Destination of Excellence (EDEN) award, World Responsible Tourism Award for best destination, Tourism for Tomorrow Award for best destination (which Burren & Cliffs of Moher Geopark is currently shortlisted for in 2014). These international awards as well as national awards can be used for securing marketing advantage and to encourage greater number of visitors to the destination.



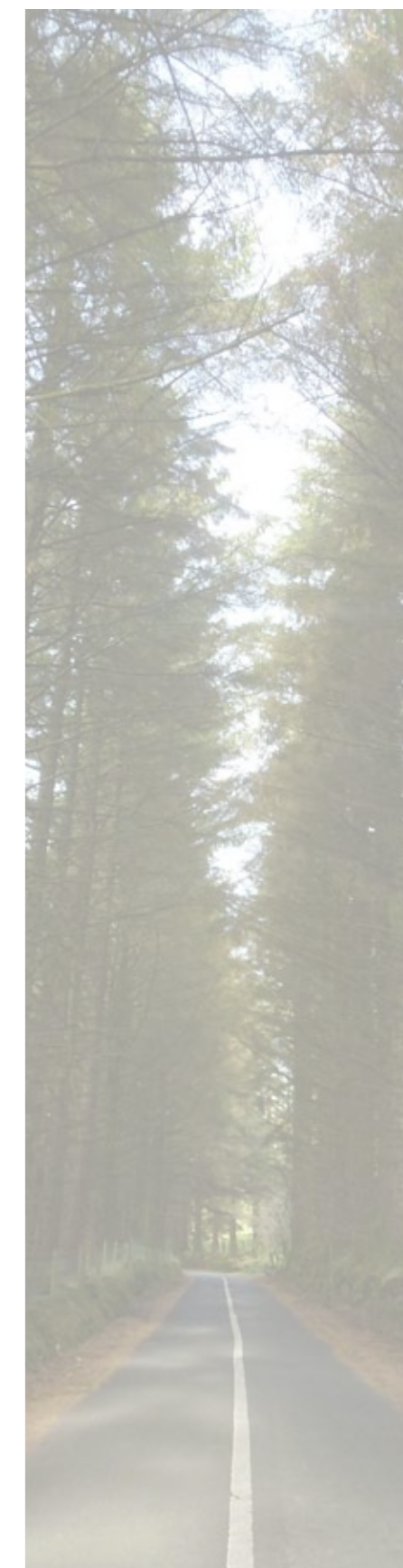
Programme 10: Responsible Tourism						
Action	Lead Agency	Partners	Timescale	Target Audience	Key Performance Indicator (KPI)	Estimated Cost
Commission a visitor monitoring plan for the <i>Great Southern Mountain Park</i>	GSMP Destination Partnership Manager External service provider		Year 1	N/A	Visitor Monitoring Plan prepared	€ 10,000
Consider taking part in the European Tourism Indicator System for the Sustainable Management of Destinations	GSMP Destination Partnership Steering	Fáilte Ireland	Year 1-3	N/A	European Tourism Indicator System adopted	

7.11 Programme Eleven: Flagship Project Identification

The purpose of this section is to identify a number of possible 'flagship' tourism projects considered suitable for further investigation. These projects have the potential to be 'local lightening conductors' attracting people to the destination and giving them a single compelling reason to visit the *Great Southern Mountain Park*. These include:

- Development of a **Great Southern Mountain Park Waymarked Way** from Carrick-on-Suir to Kilmallock (an action regarding this has been included in section 7.2)
- Establishment of a **Great Southern Mountain Park Festival** to showcase the area over a 2-week period in peak season (an action regarding this has been included in section 7.5)
- Development of a **Tree Top Adventure Park** in the Galtee Mountains or other suitable location such as one of the 13 Forest Recreation Sites. This was put forward as a suggestion by SLR Consulting and has the potential to attract families seeking outdoor adventure experience and as an alternative activity to suit some members of a group while others engage in either hard adventure experience or visiting heritage attractions.
- Facilitating the operation of a hot air balloon operator in the area to offer a **Great Southern Mountain Park Hot Air Balloon Experience**. The mountains & valley topography would be well suited to a hot air balloon ride and would be a spectacular experience for visitors and local. This was put forward as a suggestion by SLR Consulting in their report regarding the Galtee Mountains and attracted community support.

- Development of a **Great Southern Mountain Park themed Touring Route** as outlined in section 5.5.6 linking the four mountain areas. This route is shown on *Map 8: Proposed Great Southern Mountain Park Touring Route*.
- Development of an **iconic food-based visitor attraction** in Mitchelstown showcasing the food produced in the area including the many artisan food producers. Sponsorship for this attraction could be sought from the large food producers in the area. This was put forward as a suggestion by SLR Consulting in their report regarding the Galtee Mountains and attracted community support.





Programme 11: Flagship Project Identification						
Action	Lead Agency	Partners	Timescale	Target Audience	Key Performance Indicator (KPI)	Estimated Cost
Develop a new <i>Great Southern Mountain Park</i> Festival over a two-week period	Appointed external marketing/management agency	GSMP Destination Partnership Tourism Development Group Fáilte Ireland	Year 1-2	All visitors and local community	Great Southern Mountains Park Festival running	€ 10,000
Commission feasibility study into the provision of a Tree Top Adventure Park in the Galtee Mountains or other suitable location	GSMP Destination Partnership Manager External service provider	Coillte	Year 1	All visitors	Feasibility study commissioned	€ 30,000
Investigate opportunity to provide <i>Great Southern Mountain Park</i> Hot Air Balloon Experience	GSMP Destination Partnership Manager External service provider	External service provider	Year 1	Great Escapers Social Energisers Local community	Great Southern Mountain Park Hot Air Balloon Experience product available	
Develop <i>Great Southern Mountain Park</i> themed Touring Route	Fáilte Ireland	GSMP Destination Partnership Tourism Development Group Fáilte Ireland	Year 2-3	Culturally Curious Great Escapers	Great Southern Mountains Park Touring Route operational	
Commission feasibility study into the provision of an iconic food-based visitor attraction	GSMP Destination Partnership Tourism Development Group External service provider	Fáilte Ireland Bord Bia - Origin Green Key Sponsor	Year 3-4	Culturally Curious Social Energisers	Feasibility study commissioned	