

Ballyhoura Attractions Cluster Development Strategy



Ballyhoura Development Ltd



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Section 1: Research & Context

1. INTRODUCTION

1.1 THE STUDY BRIEF

Ballyhoura Development Limited, together with a consortium of visitor attractions in Ballyhoura County, have commissioned Tourism Development Resources sibility study and development proposal for establishing a complementary attractions cluster in this highly regarded rural tourism area.

This Development Plan presents proposals for an attractions cluster in Ballyhoura based on two products areas – recreation and heritage. The Development Plan is presented in two sections (Tourism Development International and Ferguson McIlveen) to undertake a fea:-

- ? Section 1 Research and Context
- ? Section 2 The Strategy

1.2 THE STUDY AREA

Maps 1 – 4 outline the study area (the Ballyhoura County zone) as defined in product marketing literature and consultations with the client group. It is recognised however that Ballyhoura has potential impact on, and draws business from, a wider area. Accommodations bordering the region (such as Adare and Tipperary town) have also been considered in the light of their potential to service the area from time to time.

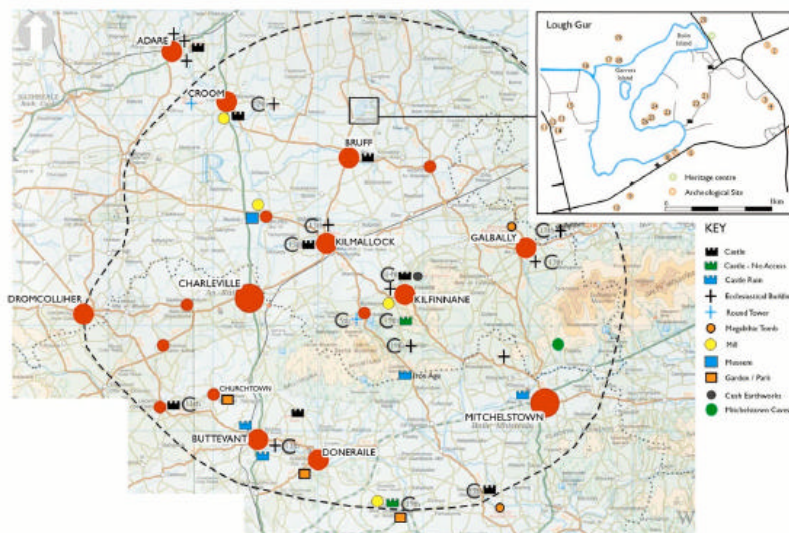
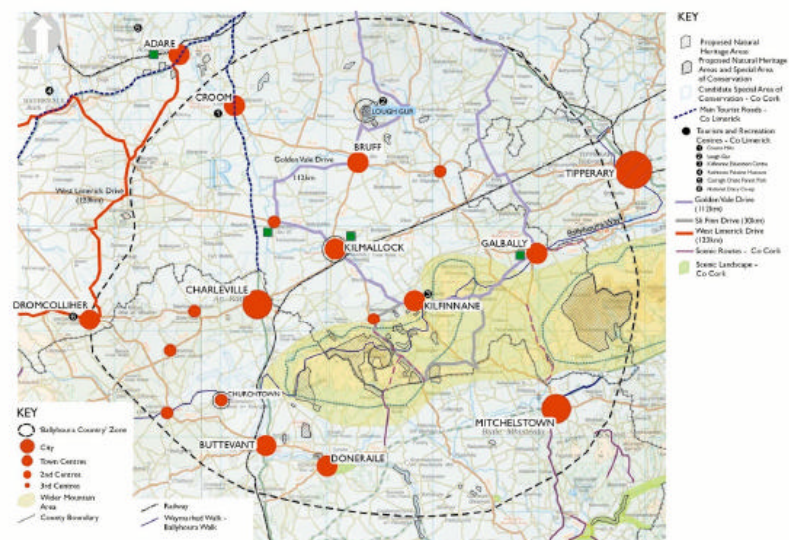


LOCATION AND CONTEXT WITHIN IRELAND



MAPS 1 & 2 BALLYHOURA COUNTRY LOCATION WITHIN IRELAND

**FERGUSON
MCILVEEN**



MAPS 3&4 BALLYHOURA COUNTRY -
GENERAL OVERVIEW AND HISTORIC CONTEXT

**FERGUSON
MCILVEEN**

2. MARKET RESEARCH AND CONTEXT

2.1 RESEARCH METHODOLOGY

The research programme involved the following elements:

- ? A physical audit of tourism products and facilities in the area to determine current usage and future potential. This was undertaken by the consultancy team both individually and collectively and the assistance of the steering group in facilitating site visits is acknowledged.
- ? An assessment of the infrastructure both within the study area and in the surrounding area was undertaken.
- ? An assessment of the accommodation base and other tourism facilities within the study area and its borders was undertaken (30km radius approx.)
- ? A review of best practice looking at potential development projects which would be developed to address specific difficulties of rural tourism areas.
- ? A market research programme combining desk research into tourism performance in Ireland and of rural tourism products, and a specific travel trade survey relating to rural tourism in Ireland and Ballyhoura's future potential.

2.2 AUDIT OF TOURISM PRODUCT

2.2.1 PLANNING CONTEXT

Cork and Limerick County Councils' policies in relation to the Ballyhoura region are set out in the current County Development Plans (1999 and 2002 respectively)

County Limerick Development Plan

Key designations identified in the plan and of relevance to the Ballyhoura region include the following:

- ? *Zones of Archaeological Potential / Areas of Special Development*
Lough Gur is a natural lake situated approximately 20km south-east of Limerick City. It is surrounded by bog and fen and is an area of great scientific, archaeological and scenic interest.
- ? *Designated Views and Prospects*
There are views of the Galtee and the Ballyhoura Mountains from the R512 south of Ardpark and along an adjacent county road, which runs between Coolfree and Long Mountains. There are further designated views into and out of Lough Gur.
- ? *Proposed Natural Heritage Areas*
There are a number of zones designated within the Ballyhoura Mountains. They are also found within Lough Gur and several smaller sites in the south and north-west of the lough.
- ? *Designated Footpaths*
The Ballyhoura Way runs from east to west through Liscarroll and Churchtown, through the mountains and on via Kilfinane and Galbally.
- ? *Designated Towns & Villages*
Many of the individual towns and villages contain listed buildings for conservation including medieval churches and castles. Castles of note include Liscarroll and Ballygrennan. Those towns listed as being of special plan interest (containing early Christian or medieval aspects to their layout) included Kilmallock, Kilfinane, Bruff and Hospital.
- ? *Tourism Area Strategy*
The planning authority has formulated a strategy for the protection of the growing tourism industry in Co. Limerick, with responsibilities placed on the local authority including road maintenance, sign-posting, roadside facilities (laybys and viewing points etc.). Areas selected include the N20 main tourist route, views and prospects, areas near major tourist attractions, attractive settlements (e.g. Kilmallock and Galbally) and the Ballyhoura Way.

County Cork Development Plan

The following key designations are of relevance within the Ballyhoura region:

- ? *Proposed Natural Heritage Areas*
There are three isolated zones identified in the southern Ballyhoura Mountain area and linear zones along the river valley south-east of Doneraile.
- ? *Scenic Routes*
The Plan lists the A14 Kilfinane to Shanballymore Road and the N8 south of Mitchelstown
- ? *Scenic Landscapes*
Doneraile and Glanworth are listed, with all of Glanworth currently treated as a sensitive archaeological/historical and high value landscape.

The Ballyhoura Mountains themselves would appear to have no other designations within either jurisdiction. The County Councils however are mindful of the attractiveness of the area in relation to planning applications, and Cork County Council report that they have actively discouraged to date the siting of wind turbines on the Ballyhoura Mountains due to the scenic nature of the area and the inter-visibility of the mountain range.

Local Plans

? Kilmallock Draft Local Area Plan (January 2002)

The 13th century walled town of Kilmallock is the fourth largest in County Limerick and is set in the valley of the River Loobagh, an area of natural beauty, with the Ballyhoura and Galtee Mountain ranges to the east and south.

The local area plan recognises that “Kilmallock has the potential to be one of the most interesting and historic small towns in the Mid-West Region” and lists opportunities for future development. These include the unspoiled natural surrounding environment, the historic medieval street and lane pattern, the strong, archaeological and historical association and the tourism and amenity development potential. The overall aim and objective of the plan is “to further the restoration of the town and build on the work already carried out... to facilitate the consolidation of the built fabric... to promote sensitive infill and to facilitate new development in a planned and sustainable manner.”

The development of the tourist industry is seen as being vital in securing a sustainable future for the town, with recommendations to develop the best features of the town and its environs whilst safeguarding both the natural and built environment. Also to protect and conserve the historic town walks, protect and ensure continued use of the town's historical resources, to contribute to the stock of green space in the town and to work in partnership with other state agencies and organisations to promote Kilmallock in an environmentally sustainable manner. It is also proposed to improve sign posting outside of and within the town and to develop a walk around the town wall.

Related Planning Documents

? Urban & Village Renewal Strategy Document Plan (2000-2006)

The objective of the plan is to set out a comprehensive framework for improving the physical environment of towns and villages in Co. Limerick in order to attract and sustain an enterprise base and to support tourism and living conditions. The areas selected are deemed to be the focal point and socio-economic centre of the surrounding area, with proposed schemes including the Market Square in Kilfinane. Kilmallock has recently benefited from renewal works costing in the region of €2.5 million. Major restoration work has also been undertaken in relation to Georgian Kingston College, Michelstown.

Related Reports

- ? *The Future Use & Role of the Medieval House, Kilmallock (Dec 2000)*

The sixteenth century townhouse is the only remaining example of its kind in Kilmallock and is owned by the State and under the care of Dúchas for whom this study was prepared. The potential future role and use of these properties is investigated in relation to the town's existing historic sites and amenities. The report recognises the need for a multi-purpose visitor hub in the area, with amenities to include a museum, visitor centre and tourism information office.

- ? *Lough Gur Tourism and Resource Study (Feb 1990)*

Lough Gur, a small natural lake with associated bog and fen set amidst limestone hills and surrounded by a rich archaeological heritage is a popular destination for visitors. The report assesses the area's resources and visual qualities and analyses resources in terms of existing and potential attraction to visitors then makes proposals for development and for planning control.

- ? *Ballyhoura Mountain Park Recreational Use Plan*

The report develops a strategic theme for the development of a mountain park as a natural as well as a tourism resource, investigating potential recreational uses for the park and including preliminary planning of facilities.

2.2.2 INFRASTRUCTURE

Roads

The study area is well served by the N20, N24, N8 and N73 national roads, with direct links to Limerick, Cork, Tipperary and Waterford cities. These are supplemented by a network of regional and county roads. Proposals, led by Cork County Council Road Design, to construct a new N20 road link between Buttevant and the Croom Bypass are at planning stage, with implementation programmed ten years plus into the future.

Railways and Public Transport

The Dublin-Cork railway line has a station at Charleville, approximately 5km northwest of the western edge of the Ballyhoura Mountains. There are no known proposals to upgrade the line or station, or to add further stations. The National Spatial Strategy has identified the Cork- Charleville- Limerick line for future development, with the potential for further opening up access to the West.

Electricity

There are no known major plans by the ESB to upgrade the supply in the Ballyhoura area.

Water and Sewerage

There are two major improvement schemes planned for the study area by Limerick County Council. The first is a sewerage scheme for the town of Kilmallock, currently in the planning stage and programmed to commence in 2004, estimated at €7 - 8m. Secondly a water supply scheme for Croom, also at planning stage and programmed to commence in 2 – 3 years, with a budget of €5 – 6m. There are a number of new sewerage schemes seeking permission from the Department, including Hospital and Bruff.

2.2.3 ACCOMMODATION

The area has a relatively weak accommodation base at present with a dominance of self catering properties. Higher financial returns and social impacts result from serviced accommodation, and this is an issue which needs to be considered in future development policy. A high degree of customer service and social interaction is also part of rural tourism experience.

The accommodation audit is based on Bord Fáilte approved or registered accommodation stock at 10 May 2002. It is recognised that a number of important accommodation developments in places such as Churchtown and Kilmallock are currently planned or in the process of Bord Fáilte approval, however these have not been considered in terms of current baseline tourism impact.

The accommodation base is summarised in table I.

TABLE 1: BALLYHOURA COUNTRY – APPROVED ACCOMMODATION

ACCOMMODATION TYPE										
LOCATION	HOTELS 2 STAR (ROOMS)	HOTELS UNGRADED (ROOMS)	UNGRADED GUESTHOUSE S (ROOMS)	TOWN/ FARM/ COUNTRY HOUSES (ROOMS)	HISTORIC HOUSES/ HEALTH HOUSES (ROOMS)	HOSTELS (ROOMS)	SELF CATERING (UNITS) 4*/3*/2*			U
Co Cork										
Buttevant								1		
Churchtown						12			1	
Castletownroche							7	1	1	
Doneraile				4	7		1			
Mittchelstown	15	15	5	9			1	1		
Charleville	20			14						
Co Limerick										
Ardpatrick								1		
Ballylanders							1			
Ballyneety				11				2		
Ballyorgan							9			
Bruff				3				1	1	
Bruree				11			1			
Croom				8						
Effin									1	
Glenroe							1			
Kilfinane				14		11	1	1		5
Kilmallock				19			2	3		
Knocklong								1		
Total	35	15	5	93	7	23	24	12	4	5

Source: Bord Fáilte Gulliver database

It is however important to note that very substantial banks of both serviced accommodation and unserviced accommodation lie just outside the Ballyhoura County core area. These include:

Mallow:

49 three star hotel rooms;

Adare:

14 five star hotel rooms;
16 four star hotel rooms;
43 three star hotel rooms;
1 three star guest house room;
106 approved Farmhouse/town and Countyhouse rooms;
6 four star self catering units;
1 three star self catering unit; and

1 two star self catering unit.

Tipperary town:

16 two star hotel rooms;
10 one star hotel rooms;
10 two star guesthouse rooms;
40 farmhouse/town county house rooms;
8 four star self catering units;
1 three star self catering unit; and
1 one star self catering unit.

Aherlow:

30 three star hotel rooms;
24 two star hotel rooms;

The following observations can be made about Ballyhoura County's accommodation base:

- ? there is substantially more accommodation outside the core area than within it;
- ? the core area has a weak hotel and guesthouse stock;
- ? there is substantial hotel competition in the surrounding area;
- ? the area has a modest supply of bed and breakfast accommodation, spread throughout the region;
- ? historic house and health farm product exists and probably has further potential;
- ? the area has a relatively strong supply of self-catering product despite being inland (self catering is most popular near the coast); and
- ? compared to its immediate surroundings accommodation grading in Ballyhoura Country is low, except in the self-catering sector where there is a high percentage of 3 and 4 star establishments.

2.2.4 ATTRACTIONS

The area has a considerable network of visitor attractions, most of which offer free access and are in the care of Dúchas. The main serviced attractions in the area are:

TABLE 2: BALLYHOURA COUNTRY VISITOR ATTRACTIONS

Co. Limerick
Lough Gur De Valera Museum & Bruree Heritage Centre Croom Mills Kilmallock Museum Ballylanders Wildlife Bog Buttercup Farm
Co. Cork
Annes Grove Gardens Doneraile Court The Donkey Sanctuary Michelstown Caves

Source: Ballyhoura Development Ltd

Returns from the fee charging attraction would indicate that Lough Derg attracts of the order of 4,000 paying visitors (and many more non-paying). Annes Grove Gardens and Doneraile Court currently attract 3,100 and 6,500 respectively.

2.3 MARKET RESEARCH

2.3.1 RURAL TOURISM PRODUCTS

This section of the report sets out anticipated prospects for key visitor activities in Ireland. The review is based on a review of past trends and also takes into account findings from various qualitative surveys produced by Bord Fáilte. In the case of cycling, research findings from specialist cycling consultants Sustrans have also been taken into account.

The activities examined below are considered to have possible potential in Ballyhoura.

History/Culture

? Interest in Ireland's history/culture amongst overseas visitors has continued to grow with almost two million overseas visitors participating in historical/cultural activities in 2000.

- ? Ireland's history/culture is considered to be all-embracing by visitors and includes the natural heritage, built heritage, Ireland's traditions and its people. It is seen as an integral part of the holiday experience in Ireland.
- ? Given the high satisfaction ratings accorded across the broad spectrum of Ireland's historical/cultural product, it is anticipated that this aspect will remain a key motivation for visits and that there is considerable potential for future growth.
- ? Not surprisingly, Dublin is the main destination within Ireland for those interested in history/culture. However, the South West is also a popular destination and as such, the region should continue to give prominence to this aspect in future marketing.
- ? With specific regard to archaeology, this aspect of Ireland's history/culture is considered to have primarily niche market as opposed to mass market appeal, across each of Ireland's main overseas markets.

Hillwalking/Hiking

- ? The market for hillwalking/hiking is a sizeable one for Ireland with over a quarter of a million overseas visitors participating in 2000. However, participation levels have declined since the peak in 1998.
- ? Further growth in participation is likely to be closely linked to Ireland's overall tourism performance and on Ireland's ability to provide continuous improvement in the walking product. Despite high levels of satisfaction being reported with the quality of Ireland's hillwalking/hiking, evidence suggests that improvements are required in relation to roads, signage and value for money.
- ? Post FMD and 11th September, it is anticipated that the Great Britain market will continue to dominate the walking market, at least over the short-medium term.
- ? In terms of walking destinations within Ireland, it is anticipated that the South West will continue as the most favoured hillwalking/hiking destination.
- ? Scenery/countryside appeal will remain the dominant motivation for walkers.
- ? In terms of type of walking activity, British visitors favour pathways and roads whilst waymarked trails, mountain walks and cross-country-walks are favoured by American and European walkers.
- ? Promotion of and easy access to packaged walking holidays will continue to be most important for the North American market and, to a slightly lesser extent, for the European market. Provision of readily accessible and detailed information on walking in Ireland will be required for the Great Britain market, to assist with independent visit planning.

Cycling

- ? There has been a significant decline in the volume of overseas visitors participating in cycling in Ireland. The overseas market for cycling is less than half of that for walking.
- ? Cycling participation in Ireland is highest amongst the mainland Europe market.
- ? Research from Sustrans indicates that there is significant growth potential amongst holiday cyclists. Those who participate in cycling whilst on holiday (non-specialists). It would appear that Ireland has been unable to exploit this potential. This may indicate a lack of significant investment in cycling infrastructure.
- ? Specialist cycling holidays is a less sizeable market than the general holiday cycling market. In this regard, it is anticipated that strongest growth is likely to be in self-organised, centre-based cycling short breaks.
- ? The South West is already a key destination for cyclists to Ireland and would stand to benefit significantly from future investment in the cycling infrastructure.
- ? Scenery/countryside will continue to dominate as the single most important factor in choosing a cycling holiday destination and should form the central message of any marketing activity.
- ? Conversely, those cycling participants registering any dissatisfaction reported road quality, road safety, directional signage and high traffic levels as particular concerns. This indicates that there may be scope to further develop the network of dedicated cycle routes.
- ? Mountain biking is growing in popularity, with many specialist trails being developed in the UK.

Equestrian

- ? The overseas tourism base for equestrian activities is small compared with other more 'mainstream' activities. Latest figures (2000), point to a market of 65,000 overseas participants.
- ? The market for equestrian activities which include trail riding, trekking and riding instruction, has fluctuated but appears to be showing signs of recovery. Britain and Europe are Ireland's two primary markets for equestrian activities.
- ? Although, there has been a marked increase in satisfaction with the quality of equestrian activities, based on past trends, it is unlikely that Ireland will see significant growth from this segment over the short term. However, as with other activities reviewed, the South West is a prime destination for overseas equestrian participants, attracting almost one-third of all overseas participants in 2000. The region should therefore be well placed to take advantage of any growth emanating from this segment.

2.3.2 TRAVEL TRADE SURVEY

A sample of 25 travel trade representatives was specifically contacted for their views on rural tourism in Ballyhoura, this sample included ten British and Irish, seven European and eight American or Canadian representatives. Of these four were Bord Fáilte tourist office managers, three were ground handlers and the rest were tour operators.

Medium and long term demand for tourism to Ireland

Among Europeans the following was said:

- ? Price sensitive Europeans may think twice about coming to Ireland if Ireland continues to get more expensive; and
- ? limited access from some markets despite demand to come here, which needs to be addressed.

Americans/Canadians said:

- ? There will be a modest increase over next 3 to 5 years of 10 per cent.

British tour operators said:

- ? There will be slow growth at first and sharp growth from 2003.

Markets and market segments

Among Europeans the following was said:

- ? Good opportunities exist from SINKS (single income no kids) and DINKS (double income no kids) from Germany but market is very price sensitive. Currently there is lots of interest but little take up.
- ? Self-drive and golf interest from Finland may offer potential;
- ? self-drive interest will exist from Austria; and
- ? the Dutch have a great desire to escape their over crowded mostly urban country and Ireland offers a brief refuge from this and is seen, in particular, as a place to take a health oriented break.

Americans/ Canadians said that:

- ? College and universities are keen to come on overseas trips as part of their education;
- ? the baby-boomers are now in a position to travel and are far more discerning than their parents were;

- ? young self-drivers are growing;
- ? retirees will continue to grow; and
- ? there is a definite leaning toward F.I.T. individuals and F.I.T. groups.

British tour operators feel that:

- ? Weekend breaks will continue to be popular from U.K. residents;
- ? special interest is expected to grow well;
- ? incentive / conference market has potential especially if access to provincial airports improves;
- ? U.K. self drives will show steady growth; and
- ? the 50 plus age group from the U.K. is always a good bet.

Products which should be developed.

For the Europeans the following was recommended:

- ? The French would like walking holidays, which include a pub at the end of a day's walking, or cycling. The Finns, Dutch and Austrians would also appreciate this product although the Finns were keener on Golf and Irish culture. The Dutch are more health conscious it seems.
- ? Among the Germans walking and cycling is also popular from a large market but the product must be very competitively priced. On the other hand there are small niche markets of anglers and golfers who will spend more if value for money products/packages are offered in pleasant surroundings.
- ? 2 Star hotels will be needed for the East European and Russian markets.

Americans/ Canadians tour operators said:

- ? The Americans need a variety of quality accommodation which is presently lacking in the provinces 5 star establishments, the old style family B & B's (where visitors come in to contact with the family), self-catering cottages for families and the no frills room for the night American style 2 star motel are all needed; and
- ? tee-time supply for golfers can be a problem.

British tour operators say:

- ? There is an awareness that quality standards must not be allowed to slip in accommodation product and service; and
- ? better access is needed in some provincial airports from British and some European cities.

What is rural tourism ?

- ? Europeans see rural tourism in Ireland as an escape from urban stresses, a chance to indulge in healthy pursuits in unspoiled beautiful countryside among a people considered more genuine and friendly than the urban Irish people.
- ? Nearly all Americans come to Ireland because of its image as a largely rural country. This is particularly attractive to American families now but the established big name rural destinations must be included in any trip e.g. Killarney, Connemara.
- ? The British, especially the English, are attracted by warm friendly people, which are perceived as being prevalent in rural Ireland.
- ? In many British minds rural tourism is eco-tourism with B & B's and self-drive mainly but also agri-tourism, garden tours and outdoor activity centres.

Strengths and Weaknesses of Ireland as a rural tourism destination.

There was much cross over between market and local supplier/ facilitator views on the strengths and weaknesses of Ireland as a rural tourism destination which were as follows:

STRENGTHS	WEAKNESSES
1. Friendly rural people.	1. Expensive especially for some Euro markets.
2. Unspoiled country	2. Poor access for Norwegians, some U.S. and Canadians into Ireland and poor access into rural areas.
3. Good variety and quality of land and water based activities	3. Little tee-time availability, especially from popular prestigious courses.
4. Good access from Finland, France and U.K.	4. Poor accommodation quality and variety in the provinces.
5. A strong Pound (U.K.)	5. Poor rural public transport

6. Common language for British and Americans. The French appreciate the increasing English /French option available in some quarters.	6. Lack of bed spaces in parts for large sport or conference groups.
7. Golf links courses for Americans	7. Smoking in pubs is considered very off putting among, mostly, West and Mid-West Americans.
8. A strong Dollar (U.S.).	8. Low profile of some rural destinations.
9. Wholesome Irish food appreciated by Americans and French.	9. Costly fares for tour buses and cars on ferries into Ireland and Northern Ireland.

It is also obvious in these responses that tour operators do not differentiate between 'Ireland' and 'rural tourism'.

Where should rural tourism product be developed?

Suggestions were as follows:

- ? Donegal with better access; Midlands; Cavan; Waterford County; Galway; Mayo; Kildare; Meath; Ballyhoura and Sligo.

What kind of rural tourism product is needed?

Suggestions were:

- ? Lesser known links courses;
- ? castles and stately homes with accommodation for Americans;
- ? comfortable en-suite Bed and Breakfast accommodation;
- ? evening entertainment close to any rural accommodation bases is very important among all markets, especially American;
- ? better shopping options for Americans are needed;
- ? French speaking walking/ cycling guides with walking/ cycling products;and
- ? added value walking/ cycling products to include, for example, music learning visiting castles, learning painting etc.

Awareness of Ballyhoura

- ? Seven U.S. and Canadian organizations did not know about Ballyhoura emphasizing the very low profile of Ballyhoura in their respective markets.

One American tour operator named the Galtee Mountains and outdoor activities like walking and hiking as being synonymous with the area.

- ? None of the Europeans contacted was aware of the area, again emphasizing a lack of information about the area to their markets.
- ? U.K. / Irish facilitators know this area for open farms, cheese making, walking, specialist activities and student language tourism. However here too there were many which were not aware of the area and could not name any features.

Development needs of Ballyhoura Country

The following comments were made:

Europeans

- ? Germans would like heritage attractions and equestrian products suitable for families;
- ? Finns will come if the pub scene is good although golf, angling, walking and equestrian, in beautiful surroundings, would also bring them in;
- ? Norwegians would appreciate a folk park style attraction provided it was family friendly;
- ? the Dutch would appreciate the environment and local historical information/ education centre and anywhere promoting the healthy lifestyle; and
- ? the French walkers/hikers are looking for off-season products/packages.

Americans and Canadians

- ? American facilitators said that any major building centre or attraction should be avoided but something should be arranged that would bring Americans and locals together, however a craft industry centre would be acceptable to at least one;
- ? Americans [and British for that matter] would appreciate attractive gardens;
- ? child friendly equestrian centres with reasonable freedom for riding through beautiful scenery rather than boring designated trails would be good; and
- ? above all, it was felt, that a much higher profile of the area needed to be created among Americans before any development ought to be considered.

Britain

- ? First and foremost, Ballyhoura should be marketed to a far greater degree than at present before any development takes place;
- ? the special interest groups generally prefer information directly from real people, that is guide information experts rather than information centres or interpretative centres;
- ? others said that development might work but it should not be ugly;
- ? a 'scenic route' product like 'The Ring of Kerry' with one or two attractions worth stopping for en route would be popular among many markets; and

- ? some unique sport /activity situated among the beautiful rolling countryside of Ballyhoura would go down well it was thought.

Conclusions

Most markets said tourism growth was starting to pick up now and that by the end of 2003 will really start to move as it had done prior to the unusual circumstances of 2001.

Many European markets were price sensitive although value for money was important all round and it was also important to maintain our competitiveness in the market place.

There were definite changing trends in the American market-segments which would grow steadily over the medium to long term and it was important to be ready to tap into these trends by providing an improved, quality, competitively priced Irish product which already had a good reputation among Americans. In particular there were a lot of opportunities to be gained by providing a wide variety of very good quality accommodation at all levels.

The British would continue to favour Ireland for short breaks although, like the Americans, Ireland could be good for families. There was a strong emphasis from many markets for family friendly products such as heritage based attractions based around a castle/historic feature with interactive aspects, equestrian and other similar family activities. Suggestions arose for tagging on culture packages to activity holidays to provide an added-value type of holiday break: A sort of "experience and learn" scenario.

Golf was mentioned as popular among all markets although from a Ballyhoura point of view this was less helpful, as links golf will remain more popular than parkland or health-land.

Access was good for some markets but poor for others and many, especially the corporate client would prefer to have access directly into a provincial airport from Europe or America. The incentive market was considered of growing importance and attractions dealing with this corporate market, like those in Wicklow, could work well in Ballyhoura provided access could be gained to quickly.

Europeans and Americans see rural tourism in Ireland as an escape from the stress of their own urban life. Irish rural tourism means friendly people, unspoiled countryside, self drive and family B & B accommodation for the most part. It is not seen as region-specific (all of Ireland is seen as "rural tourism").

Not many respondents were aware of Ballyhoura Country, emphasising the need to raise its profile in all markets. The only type of attraction recommended for the area and repeated by nearly all markets was the heritage type mentioned above. Europeans and Americans liked to combine the environmental experience with meeting local people.

However the West Americans who were travelling more than their Eastern cousins, at present, expected perhaps higher standards. (Smart, smoke free pubs with Irish entertainment laid on).

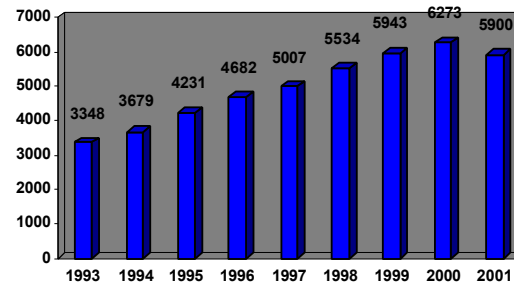
Generally all markets, wish to ensure that any development be undertaken in a sustainable way, in a manner that would preserve a type of Ireland which is fast disappearing.

3. CURRENT TOURISM PERFORMANCE

3.1 TOURISM IN IRELAND

Overseas tourist visits to Ireland grew by 6 per cent between 1999 and 2000 to 6.3 million - the ninth successive year of growth and then declined in 2001. Charts 1, 2 and 3 below illustrate the growth in overseas tourists in terms of numbers, bednights and foreign exchange earnings.

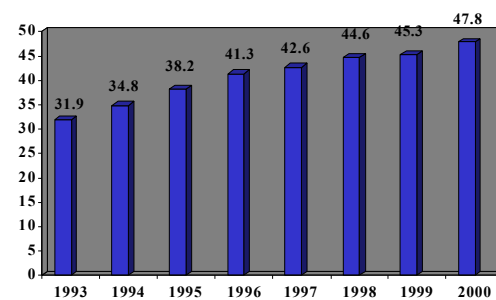
CHART 1 – OVERSEAS TOURIST NUMBERS ('000's)



Source: Bord Fáilte/CSO

Between 1993 and 2000, the total number of overseas tourists visiting Ireland rose by 87 per cent to 6.3 million. 2001 figures show a decrease of 5 per cent in overseas visits to Ireland, standing at 5.9 million.

CHART 2 – OVERSEAS TOURIST BEDNIGHTS (MILLION)

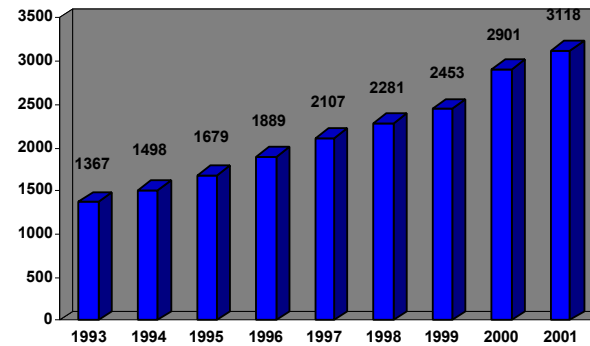


Source: Bord Fáilte/CSO

In the eight year period from 1993 to 2000, the number of bednights increased by 15.9 million, representing a growth rate of 50 per cent over this period.

CHART 3– FOREIGN EXCHANGE EARNINGS (IR£ MILLION)

Source: Bord Fáilte/CSO



2001 figures show a decrease of 5 per cent in overseas visits to Ireland, standing at 5.9 million.

In the 1993 to 2000 period, foreign exchange earnings grew by 112 per cent to IR£2,901 million (€ 3,683.5 million), representing an average annual growth of 14 per cent.

Total foreign exchange revenue increased by 8 per cent between 2000 and 2001 to IR£3,118 million (€ 3,959 million).

Interestingly, both visits and revenue from Northern Ireland and domestic markets showed a significant increase between 2000 and 2001 performance: this equated to an increase of 10 per cent and 15 per cent respectively from Northern Ireland market and 14 per cent and 16 per cent from the domestic market.

3.2 TOURISM IN THE COUNTIES

3.2.1 NUMBER OF TOURIST VISITS - 2000

There were over 2.8 million tourist visits to Counties Cork, Tipperary North and Limerick in 2000 as illustrated in Table 3.

TABLE 3 : TOURIST VISITS 2000

	Overseas Visits (000s)	Domestic Visits* (000s)	Northern Ireland Visits* (000s)	Total Visits (000s)
Cork	1,264	779	18	2,061
Limerick	438	235	6	679
Tipperary (North)	42	21	0.5	63.5
	1,744	1,035	24.5	2803.5

Source: Bord Fáilte

County Cork attracts the lion's share (74 per cent) of tourist visits.

3.2.2 TOURIST REVENUE - 2000

TABLE 4 : TOURIST REVENUE 2000

	Overseas Revenue (IR£m)	Domestic Revenue* (IR£m)	Northern Ireland Revenue* (IR£m)	Total Visits Revenue* (IR£m)
Cork	254	134	3.7	391.7
Limerick	144	55	1.9	200.9
Tipperary (North)	7	3	0.1	10.1
	405	192	5.7	602.7

Source: Bord Fáilte

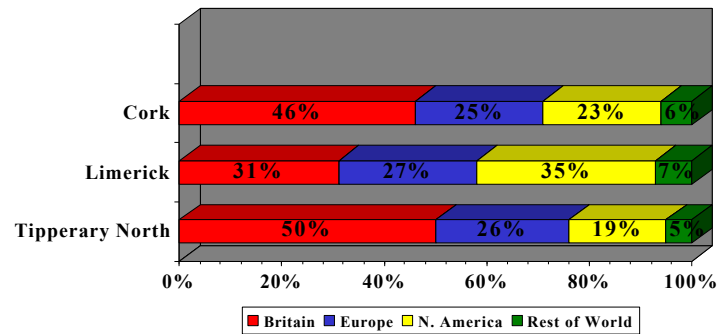
Of the total IR£602 million spent by visitors in 2000, 67 per cent was derived from overseas visitors.

* Domestic and Northern Ireland visitor numbers and revenue are not available at county level. However, Tourism Development international has provided indicative estimates by assuming that domestic and Northern Ireland visitors follow a similar pattern of distribution to overseas visitors. Therefore caution should be exercised in interpreting this analysis.

3.2.3 OVERSEAS MARKET PROFILE BY COUNTY - TOURIST VISITS (2000)

Chart 3 highlights the variations in overseas market profile by county.

CHART 3 : OVERSEAS VISITOR PROFILE 2000



Source: Bord Fáilte

It should be noted that:

- ? Britain is the main overseas market to Tipperary North and Cork;
- ? Limerick attracts a marginally higher share of North American than British visitors;
- ? three areas attract relatively even share of the European market; and
- ? it is anticipated that approximately two-thirds of overseas visitors to these counties are Pure Holiday Visitors.

3.3 TOURISM IN BALLYHOURA

In the absence of local area tourism performance data, accommodation stock and regional performance data has been used to quantify the size of Ballyhoura's tourism economy. Caution should be however exercised in interpreting this analysis however, as sub regional estimates are very difficult to quantify

The key findings of this analysis are as outlined in table 5:

TABLE 5: BALLYHOURA COUNTY INDICATIVE TOURISM PERFORMANCE 2000

BALLYHOURA - TOURISM PERFORMANCE 2000			
	Visits (000s)	Nights (000s)	Spend IR £m (€m)
Overseas	16.2	80.5	3.7 (4.7)
Domestic	12.1	N/k	1.7 (2.1)
Northern Ireland	*	N/k	0.05 (0.6)
TOTAL	28.3		5.45 (6.9)

Source: Bord Fáilte and Tourism Development International Estimates

** Less than 1,000*

Table 5 illustrates that there were an estimated 28,300 overnight visits to the Ballyhoura area 2000. Tourism contributed an estimated IR£5.45 million (€6.9) to the local economy in that year.

4. OPPORTUNITIES AND CONSTRAINTS

4.1 STRENGTHS OF BALLYHOURA COUNTRY

4.1.1 MARKET ADVANTAGES

- ? Ballyhoura is one of the better known rural tourism initiatives in Ireland;
- ? it is centrally located in southern part of Ireland;
- ? it straddles two popular holiday areas – Cork/Kerry and Shannon;
- ? it is close to centres of population – Cork and Limerick;
- ? it has strong community group backing; and
- ? a website and Ballyhoura branding have been launched.

4.1.2 ENVIRONMENTAL ADVANTAGES

- ? Ballyhoura has a wealth of historic built assets;
- ? many heritage buildings are in state care;
- ? an attractive network of towns and villages exists;
- ? the area has a rich history with many well preserved sites (Lough Gur, Liscarroll, Kilmallock, Doneraile, etc.);
- ? Annes Grove Gardens and Doneraile Park are quality nature-based assets;
- ? there are interesting literary connections (Elizabeth Bowen, Edmund Spenser);
- ? estates and mansions are a feature of the landscape;
- ? there is a rural agricultural landscape and a strong rural heritage; and
- ? the Ballyhoura mountains offer contrasting landscapes.

4.1.3 FACILITIES

- ? Ballyhoura is close to airports at Cork and Shannon;
- ? mainline rail access to Charleville is a plus;
- ? national roads (N20 and N24) go through the area;
- ? there is a good network of roads and laneways through the area;
- ? the area is close to a wide range of attractions in more popular tourist areas;
- ? the Ballyhoura Way, trails and some cycling routes have been signed; and
- ? the main accommodation clusters (small) are Mitchelstown, Charleville, Killmallock, Kilfinane.

4.2 WEAKNESSES OF BALLYHOURA COUNTRY

4.2.1 MARKETING WEAKNESSES

- ? there is a lack of physical identity to Ballyhoura County;
- ? it is not a naturally recognised area or administrative unit;
- ? there is a very limited marketing budget;
- ? there is limited awareness of the area amongst the travel trade;
- ? the area is split between different regional development and county council areas;
- ? the “Mountain Park” is not credible; and
- ? the area's image is dependent on “rural tourism”.

4.2.2 ENVIRONMENTAL WEAKNESSES

- ? Ballyhoura is generally an undistinguished landscape;
- ? extensive and increasing ribbon and piecemeal development is evident;
- ? loss of vernacular architectural features is quite striking;
- ? sub-urbanisation and car-based commuting is on the increase;
- ? the hills lack variety;

- ? access to monuments is a problem in some places;
- ? corridor tourism is a problem, visitors just drive through; and
- ? blanket coniferous forestry in uplands makes for dull scenery.

4.2.3 FACILITIES

- ? There is a limited accommodation range, particularly in serviced accommodation;
- ? limited activity provision is available at present;
- ? poor signage is evident;
- ? attractions are poorly presented with little interpretation; and
- ? public transport networks are weak.

4.3 OPPORTUNITIES FOR BALLYHOURA COUNTRY

4.3.1 MARKET

- ? Interest in heritage is growing across all markets;
- ? interest in activities is also strong;
- ? interest in quality rural experiences will increase;
- ? there is potential to target a strengthening domestic market;
- ? there is potential to develop activity packages;
- ? there is potential to attract families;
- ? the Walled Towns Friendship Circle provides models for Killmallock; and
- ? the use of the Ballyhoura brand can be rolled out.

4.3.2 ENVIRONMENTAL OPPORTUNITIES

- ? Develop a model of best practice in forest recreation in the Ballyhoura mountains;
- ? make better use of built heritage assets;
- ? Killmallock as a walled town is unique in Munster;
- ? Mitchelstown, designed town, georgian square;

- ? there is a need to protect Lough Gur through zoning and management; and
- ? agriculture and food-based tourism products might be developed.

4.3.3 FACILITIES

- ? Use good road network for linkages;
- ? develop parking and access at key sites;
- ? trails for walking and cycling could be further developed;
- ? private sector strengthening, based around heritage and activity tourism, should be encouraged;
- ? activity/ spa linkages might be built up;
- ? more "Landmark Trust" type accommodation could be developed (Annes Grove Gate Lodge is a current example);
- ? directional signage will be needed;
- ? the Ballyhoura organisational structure can be built upon; and
- ? links to surrounding destinations to form bigger inland area "Ballyhuoura, the Golden Vale and the Blackwater Valley" could be considered.

4.4 THREATS TO BALLYHOURA COUNTRY

4.4.1 MARKET

- ? Market failure in Irish "rural tourism" product is evident; and
- ? Competition from mainstream areas will continue.

4.4.2 ENVIRONMENT

- ? Continuing loss of character through ribbon and inappropriate development is a real danger;
- ? Misguided renovations of vernacular buildings will damage the long term potential; and
- ? Damage to historic monuments must be avoided.

4.4.3 FACILITIES

- ? Inappropriate development in towns/ villages and rural area threaten tourism; and
- ? Visual pollution through excessive signage needs to be avoided.

5. CONCLUSIONS

5.1 INTRODUCTION

Ballyhoura County has pleasant countryside, friendly and professional tourism businesses, as well as considerable heritage and potential for activity tourism. Yet it is underperforming as a tourism destination. It is notoriously difficult to shift patterns of tourism distribution in a region, and what has been achieved so far has been based largely on the branding of Ballyhoura as a "rural tourism" destination.

Market research indicates that all of Ireland (outside Dublin) is seen by overseas markets as a rural tourism destination. In order for Ballyhoura to raise its profile and stimulate further tourism growth to gain market share, new products and shifts in marketing emphasis are required. These should be complementary to the area's rural tourism profile, and also capable of attracting those market segments, which will deliver future tourism growth.

Two themes have emerged from the product audit as being particular strengths of Ballyhoura, and as having potential to deliver future growth. These are

- ? Heritage tourism; and
- ? Activity tourism.

5.2 HERITAGE TOURISM POTENTIAL

Ballyhoura has a wealth of heritage sites with great variety and depth. These include the ancient monuments of Lough Gur, castles and fortifications from almost every period of Irish history, a walled town, estates and mansions and attractive vernacular buildings and planned towns. The challenge is to cluster these and make them meaningful to the visitor, in order to provide a stimulating, memorable and entertaining experience.

5.3 ACTIVITY TOURISM POTENTIAL

The Ballyhoura Mountain Park has considerable potential to be developed as a venue for walking, cycling, mountain biking, orienteering and other activity products. It is suggested that it should be re-branded as the Ballyhoura Forest Recreation Area. It can service the surrounding accommodation base in Cork, Tipperary and Limerick and should be developed as with graded access points convenient to accommodation clusters.

5.4 OTHER DEVELOPMENT OPPORTUNITIES

Other development opportunities for the private sector, which are suggested (subject to individual feasibility considerations) include:

- ? More serviced accommodation of quality;
- ? more activity providers;
- ? upgrading of attractions and enhancement of catering and retail facilities;
- ? wellness/ spa type developments; and
- ? "Landmark Trust" type self-catering in distinctive existing buildings (4 star).

The public sector should be lobbied to undertake initiatives in Ballyhoura relating to:

- ? integrated Ballyhoura branded signage initiatives;
- ? development of conservation areas and conservation plans for towns and villages; and
- ? the protection of the landscape in Ballyhoura.

Section 2: The Strategy

6. VISION

The vision that underlies this tourism development strategy for Ballyhoura Attractions Cluster is as follows:

“ Ballyhoura can become a first-class rural holiday destination for independent and special interest visitors from overseas, and independent and leisure visitors from the domestic market, offering access to a range of high quality recreational activities and an integrated rural heritage experience unrivalled in Ireland.

To realise this potential, the implementation of specific product development and marketing actions will be necessary, facilitated by a serious commitment of resources and a spirit of co-operation and partnership between Ballyhoura Failte, the tourism trade and other key stakeholders”.

7. STRATEGIC OBJECTIVES

In order to achieve the vision as set out above, the key objectives of the development strategy for Ballyhoura are as follows:-

OBJECTIVE 1	To adopt a co-ordinated approach to the development of the Ballyhoura tourism product, with a particular emphasis on heritage and leisure activities.
OBJECTIVE 2	To build on the Ballyhoura brand name through a programme of direct and co-operative marketing activities based on heritage and leisure activities.
OBJECTIVE 3	To build on existing structures and work with the statutory agencies (local Authorities, Dúchas and Coillte) to ensure the delivery of a co-ordinated approach to the implementation of this development plan.

Matching current trends in international tourism and an understanding of the needs and aspirations of international and domestic holidaymakers with the resources of the Ballyhoura area, the development strategy for the Ballyhoura Attractions Cluster, will focus on heritage tourism and activity tourism.

The Ballyhoura Attractions Cluster Development Strategy will be based around the implementation of two initiatives:-

- ? Ballyhoura Forest Recreation Area
- ? Ballyhoura Heritage Initiative

Details of the two initiatives are outlined in Chapters 8 and 9 respectively.

8.0 BALLYHOURA FOREST RECREATION AREA



8. BALLYHOURA FOREST RECREATION AREA

8.1 BACKGROUND

8.1.1 COILLTE TEORANTA -TIMBER PRODUCTION

In preparing these proposals for the future development of Ballyhoura Forest Recreation Area it was considered essential that the production of timber should be fully understood and should not be compromised in any way as a result of the proposals.

As part of the concept development process an extremely useful meeting was held with Coillte staff in Mallow, Co Cork. The dynamics of the forest were explained and the opportunities and constraints of integrating recreational provision were considered.

In the North East Cork Forest Management Plan 2002-2006 (also covers the Co. Limerick area of the Ballyhoura mountain range) reference is made to both the Long Term Vision and Five Year Objectives. Those points most relevant to this project are highlighted below:

8.1.2 COILLTE'S LONG TERM VISION

Economic

- ? Coillte's estate will expand.
- ? Sitka spruce will remain the dominant species accounting for just less than 65% of the estate. Broadleaves will increase from its present 2% to greater than 10%.
- ? The production of high quality sawlogs will be the primary objective.
- ? Coillte will continue to develop the non timber commercial potential of its lands.
- ? Customers will be in receipt of a first class service.

Environmental

- ? Greater than 15% of the estate will be managed where biodiversity conservation will be the primary objective. Rare species and habitats will be protected and old woodlands will be restored.
- ? The quality of our forests in the landscape will be improved through landscape design and restructuring.
- ? Water quality and forest health will be continually monitored.
- ? Deer populations will be managed to an agreed plan.

Social

- ? Stakeholder consultations will remain central to the development of Coillte's plans.
- ? The open forest policy will be maintained.
- ? The richness of our culture and heritage will be maintained.
- ? Recreational facilities will be developed in partnership with local communities as demand arises.

8.1.3 FIVE YEAR OBJECTIVES (SELECTED)

Economic Objectives

- ? Develop Coillte's non-timber revenue through licensing of recreational and sporting activities and other land uses.

Environmental Objectives

- ? Manage 15% of the estate with biodiversity as the primary objective.
- ? Ensure that forest blocks fit neatly into the landscape and have a diverse age structure through forest design, restructuring and sensitive planting.
- ? Lower the impact of key forest operations on the environment.

Social Objectives

- ? Consult in a systematic manner on economic, social and environmental matters and respond constructively to issues raised by the public.
- ? Protect and maintain the health and safety of staff, contractors and the general public.
- ? Enhance education, training and research within the FMU.
- ? Enhance the recreational benefits of the forest.
- ? Protect all archaeological sites and monuments on Coillte property and ensure that locally important folk heritage sites are safeguarded.
- ? Maximise the socio-economic benefits of forestry to the area.

It is also important to highlight Coillte's commitment to Sustainable Forest Management (SFM).

In practising SFM Coillte are committed to :

- ? Develop our forests in a way that is environmentally sensitive, socially beneficial and economically sustainable.
- ? Choose to independently verify that SFM is being practised in our forests through the Forest Certification Process.

- ? Undertake to work, with our stakeholders, towards full compliance with Irish Forestry standards.
- ? Strive to achieve full compliance with the Standard at the earliest date with the resources available.
- ? Abide by Forest Service Code of Best Forest Practice and related guidelines on Archaeology, Fisheries, Landscape, and Biodiversity among others.
- ? Strive for continuous improvement of forestry practices.

Other documents considered when preparing these proposals include:

- ? Forestry and Water Quality Guidelines
- ? Forestry and the Landscape Guidelines
- ? Forest - Biodiversity Guidelines
- ? Forestry and Archaeology Guidelines
- ? Forest Harvesting and the Environment Guidelines

8.1.4 FORESTS

All forests are dynamic and ever changing, albeit slowly. In a commercial forest, change is almost all under control and management. Understanding and working with this management will be essential in developing appropriate and compatible recreational facilities.

Trees follow a cycle within the forest, seedlings are planted, cared for, thinned and finally felled for the cycle to begin again.

The cycle of work can be summarised as follows:-

- ? preparing for planting/fencing
- ? planting
- ? spraying (vegetation control/pesticides)
- ? fertilisation (manual and from the air)
- ? thinning
- ? clearfelling
- ? timber haulage (up to 20-30 lorries/day)
- ? road making and maintenance
- ? hedge trimming/foliage cutting

The length of the cycle varies in accordance with the species location (speed of growth). Commercial forests normally have blocks of trees at various stages within the cycle in order to provide continuity of production. The forest is at risk from the forces of nature, wind damage and from the risk of fire. Caretakers, local people, keep an eye out for fires. All felling is regulated by

licence from Forest Service and there is extensive consultation with the public, Duchas, the County Councils and others.

The overall objective in terms of new planting for the Forest Management Unit is :-

- ? 65% Sitka Spruce (primary species)
- ? 20% diverse species (Larch Pines etc)
- ? 15% (5% open space 10% broadleaves)

The provision of open space and broadleaves is not on a block by block basis but by management unit. The grouping together of this 15% into corridors and nodal points throughout the forest would appear to be an ideal way of providing both ecological and recreational corridors. Matching this with topography should also be considered. For example river valley floors, mountain and hill tops and ridges could be linked together.

This would achieve a number of objectives:-

- ? 15% requirement
- ? create ecological corridors (permanent)
- ? create recreational routes (permanent) away from forestry roads and operations
- ? create landscape and visual interest

In summary it is vital that the management of both the forest as an economic unit and as a recreational opportunity are integrated. It is essential that the zoning and location of activities is compatible with the forest cycle. It is important that day to day management of any future recreation provision is linked to day to day forestry activities.

8.2 THE AIM AND OBJECTIVES

8.2.1 AIM

The overall aim of the project is to provide a wide range of passive and active recreational opportunities within the context of a viable working forest in order to bring social and economic benefit to the local community.

8.2.2 OBJECTIVES

- ? To provide a wide range of passive and active recreational activities which are compatible with the environment and which do not conflict with forestry operations.
- ? To cluster together compatible and segregate incompatible activities.
- ? To enhance pedestrian access and circulation within the area and to provide appropriate facilities at entrances.
- ? To establish an appropriate recreational management organisation.
- ? To produce a detailed recreational management plan integrating recreation provision with timber production.
- ? To provide opportunities for the local community to establish and develop business opportunities based on recreation provision around and within the forest.
- ? To actively promote the forest as a recreation area to the local community and visitors.
- ? To work within Coillte's Vision and their commitment to Sustainable Forest Management to protect and enhance the general environment.

8.3. THE RECREATION AREA

The recreation area is defined as those lands owned and managed by Coillte within the Ballyhoura mountains.

While the provision of recreation facilities will be confined to this area it is recognised that there will be important linkages (footpaths, cycle routes etc) to surrounding towns, villages, places of interest and beyond.

8.4 VEHICULAR ACCESS

- ? Access points and roads for timber production will be required throughout.
- ? It is proposed to restrict public vehicular access to the perimeter of the area. The reasons for this are:-
 - i) It would be contrary to the overall development and management objectives.
 - ii) Prohibitive cost of construction and maintenance of an appropriate roadway
 - iii) Safety, security and misuse considerations
- Subject to demand, consideration will be given to operating a 4 wheel drive service from the perimeter along the scenic route to the lookout point. This would represent an opportunity for the private sector.
- ? Other vehicular access will only be permitted for certain special events such as car rallying or such activities as 4 x 4 driving routes.
- ? Adequate carparking will be provided at multiple access points around the forest in order to increase accessibility.
- ? It would not be the intention to reopen the scenic route to vehicles*.

8.5 PEDESTRIAN ACCESS AND CIRCULATION

- ? The overall intention is to make the forest as accessible as possible for people on foot with multi-access points being provided. These access points will link into a network of interconnected paths, trails, cycleways and bridleways.
- ? While it is proposed to use the existing network of forestry tracks it is also intended to build new paths and trails. It would be hoped that these could follow river valleys and be linked into open space and broad leaf planted areas, creating more interest, environmental quality and human scale.

* There are significant management concerns and maintenance implications associated with the re-opening of vehicular access.

8.6 EXISTING RECREATIONAL PROVISION

- ? Each potential recreational opportunity should be considered on its own merits and tested against a number of criteria to determine its appropriateness or not. Similar activities should be clustered together while incompatible ones should be segregated.

8.6.1 EXISTING ACTIVITIES

At present there are a number of existing activities.

- | | | |
|-------|---------------|--|
| (i) | Shooting | <ul style="list-style-type: none"> - 5 gun clubs (across the whole area) - 5 year licence agreement from Coillte (1998 2003) - November – February - Bag returns (record what is shot) - Numbers involved in decline - Potential to reduce area and limit activity |
| (ii) | 4 x 4 Driving | <ul style="list-style-type: none"> - Organised by clubs - Good revenue - Up to 12 events/year at weekends - Up to 40 jeeps - Routes marked out - Needs an extensive area - Visual quality not an issue |
| (iii) | Walking | <ul style="list-style-type: none"> - Long distance trail - Short loops - Nature trail |
| (iv) | Orienteering | |

8.7 NEW RECREATIONAL OPPORTUNITIES

Following on from our consultations market research best practice review and general environmental assessment of the area the following recreational provision is proposed. The detailed layout of all trails, routes, pathways and associated facilities will be the subject of detailed consideration under the management plan.

8.7.1 ACTIVITY TOURISM POTENTIAL

The Ballyhoura Mountain Park has considerable potential to be developed as a venue for walking, cycling, mountain biking, orienteering and other activity products. It is suggested that it should be re-branded as the Ballyhoura Mountains Recreation Area. It can service the surrounding accommodation base in Cork, Tipperary and Limerick and should be developed with graded access points convenient to accommodation clusters.

8.7.2 GEOGRAPHICAL EXTENT

The current proposal relates to Ballyhoura Mountains (lands in the ownership of Coillte) but clearly has the potential to link in the longer term with adjacent mountain zones and private lands (eg. Sliabh Riadh, Sliabh na Muc and the Galty range).

8.7.3 OVERALL CONCEPT

The forest recreation area will develop over time and in co-ordination with forestry activities. It will consist of a network of paths and trails accessible from locations around the perimeter, where only basic visitor facilities will be provided. These include carparking, signage, information, picnic tables and toilets. There will be no major visitor centre. Some facilities will be designed for access for people with a range of disabilities. Existing recreation provision will be re-organised. Compatible activities will be grouped together.

8.7.4 ENTRANCE POINTS

A hierarchy of access points will be developed, offering differing levels of facilities as follows:

- ? A-level access points would include car park, toilets, information, picnic and play areas, access to trails and possible private sector facilities (eg bike hire).
- ? B-level access points would have car parking, information, picnic area and trail access.
- ? C-level access would be car parking, information and trail access.

* Access points are identified on site plan

8.7.5 RANGE OF ACTIVITIES

The following facilities and activities are suggested:

WALKING	<ul style="list-style-type: none">- long distance footpaths- middle distance (viewpoints)- short distance trails (nature, art, exercise)- birdwatching
CYCLING	<ul style="list-style-type: none">- long distance routes- shorter loop routes- linkages to attractions- mountain bike trails- children's shorter trails
EQUESTRIAN	<ul style="list-style-type: none">- one hour trails- two hour trails- half and full day trails
SPECIAL INTEREST	<ul style="list-style-type: none">- orienteering- fell running
MOTORISED	<ul style="list-style-type: none">- quad bikes- trial bikes- four-wheel drive areas
SHOOTING	<ul style="list-style-type: none">- restricted by area and season
SPECIAL NEEDS	<ul style="list-style-type: none">- children's play area(s)- pond angling- facilities for physically challenged, including fishing stands
EVENTS	<ul style="list-style-type: none">- car rallying- family outings- special interest lectures/field trips- others

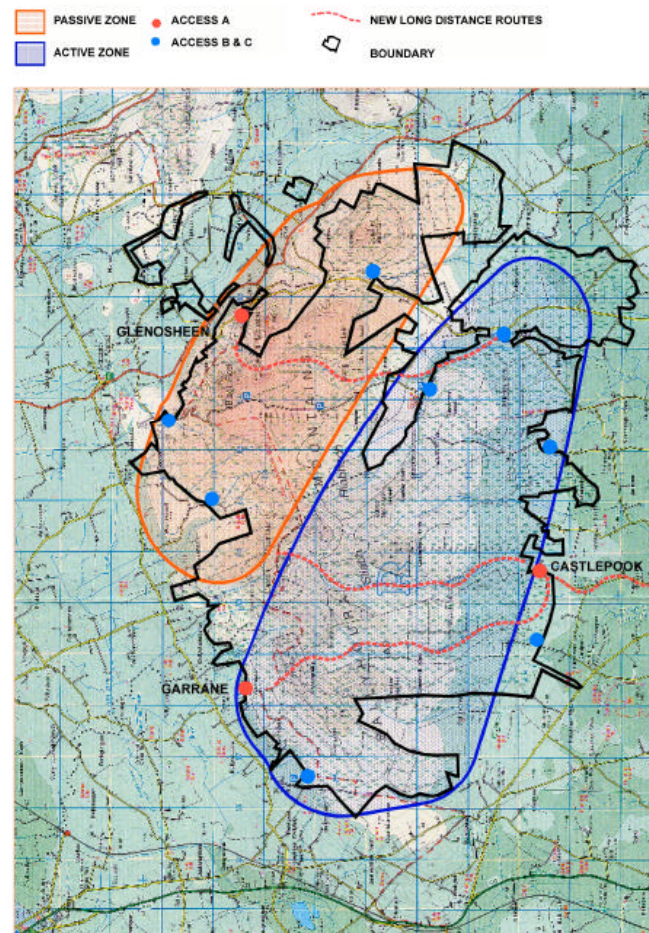
8.7.6 PRIVATE SECTOR

It is envisaged that the park management organisation will provide and maintain the basic infra-structure, creating the opportunity for the private sector to develop activities such as walk guiding, cycling and pony trekking.

Special events may be organised by either sector, and community sector individually or in partnership.

The facilities would be available for use by the local community at all times. The private sector will have the chance to develop businesses around the recreation area, accommodation, food, beverages and activity facilities.

8.8 BALLYHOURA MOUNTAINS FOREST RECREATION AREA PRELIMINARY DEVELOPMENT PLAN



**FERGUSON
McILVEEN**

8.8 PRELIMINARY DEVELOPMENT PLAN

The following plan sets out a preliminary concept for recreation provision. Clearly much more detailed work will be required to confirm the alignment of paths and zoning of activities etc. This development strategy anticipates a programme of actions over a five year period from 2003-2007. The timescale of actions are:-

YEAR	TIMESCALE	KEY
? YEAR 1 (2003)	Short Term	S
? YEAR 2 – 3 (2004-2005)	Medium Term	M
? YEAR 4 – 5 (2006-2007)	Long Term	L

8.8.1 MANAGEMENT PLAN

RECOMMENDATION 1

Produce a long term forest recreation management plan in association with Coillte which reconciles the economic reality of the working forest with the development of recreation provision.

ACTIVITY	RESPONSIBILITY	TIMESCALE
? Agree terms of reference	Coillte Ballyhoura Development Ltd	S
? Undertake Forest Recreation Management Plan	Coillte Ballyhoura Development Ltd	S
? Ecological Survey	Coillte	S

8.8.2 ZONING

RECOMMENDATION 2

Two main zones are suggested one passive one active and the approximate extent of these have been indicated on the plan. Zones will however not be mutually exclusive and there will be overlap particularly in relation to longer distance walking, cycling and equestrian activity. The location of shooting within the area needs more detailed consideration/consultation.

ACTIVITY	RESPONSIBILITY	TIMESCALE
<p>? The development of the Active Zone will include:-</p> <ul style="list-style-type: none"> † Motorised activities – 4x4 and quad bikes † Trial bikes † Mountain biking † Shooting † Fitness Trail 	Ballyhoura Development Ltd	S – M
<p>? The development of the Passive Zone will include: -</p> <ul style="list-style-type: none"> † Special walking trails † Special walking routes † Equestrian trails † Fitness trails 	Ballyhoura Development Ltd	S - M

8.8.3 ENTRANCES / GATEWAYS/ACCESS

RECOMMENDATION 3

The overall objective is to make the area as accessible as possible while restricting/controlling vehicular access at the perimeter. A hierarchy of access points is proposed. Three access points will have the most facilities and are intended to act as the gateways to the area for the largest number of people. They will not provide identical facilities but rather will be customised to their location and zone which they service.

ACTIVITY	RESPONSIBILITY	TIMESCALE
<p>? Glenosheen (emphasis on family provision)</p> <ul style="list-style-type: none"> † carpark † information † toilets † picnic table † children play † access to specialist walking and cycling trails † possible private sector provision (bike hire) 	Ballyhoura Development Ltd	S – M
<p>? Garrane (emphasis on serious activities)</p> <ul style="list-style-type: none"> † secure carparking † vehicular access control point † toilets, showers changing † information † possible private sector (bike hire/ other) 	Ballyhoura Development Ltd	S - M

ACTIVITY	RESPONSIBILITY	TIMESCALE
<p>? Castlepook River (General Access)</p> <p>† secure carparking</p> <p>† toilets</p> <p>† picnic tables</p> <p>† information</p>	Ballyhoura Development Ltd	S – M
<p>? Other Access Points B and C Level</p> <p>† The suggested distribution of these are indicated on the plan.</p> <p>† The exact location and specific provision at each site will require further detailed consideration.</p>	Ballyhoura Development Ltd	M - L

8.8.4 NETWORK OF PATHS AND TRAILS

RECOMMENDATION 4

The existing network of service roads and paths will be used to develop recreation access and circulation for walkers, cyclists and equestrian users. Segregation of these activities will be required in certain areas particularly where special routes are being proposed.

At least three new routes following river valley are proposed.

ACTIVITY	RESPONSIBILITY	TIMESCALE
? New paths are proposed which would follow watercourse along valley bottoms. It would be the intention that these new paths would be exclusively for walking, cycling and equestrian activities and with the incorporation of open space and native species planting create permanent high interest routes.	Ballyhoura Development Ltd	M
? Three such new routes are indicated and these link into A access gateways but also to the Ballyhoura Way and in the case of the Casltépook and Bregage Rivers it is suggested that a cycle/footpath route to Donneraile be developed.	Ballyhoura Development Ltd	M
? A series of looped routes for different recreational facilities should be established/marked from each of the A gateways. This will involve maps, new paths waymarkers and the creation of lookout points with seating and orientation maps.	Ballyhoura Development Ltd	M

8.8.5 MOUNTAIN AND QUAD BIKING (BASED AT GARRANE GATEWAY)

RECOMMENDATION 5

It is proposed to provide mountain biking, quad bike trails, 4x4 tracks and a trial bike area. Ongoing maintenance will be required to ensure that facilities are maintained to the highest standard.

ACTIVITY	RESPONSIBILITY	TIMESCALE
? A series of mountain bike trails (varying difficulty and distance)	Ballyhoura Development Ltd	M
? 4x4, quad bike routes (flexible planning to be in remoter area)	Ballyhoura Development Ltd	M
? Trail bike area	Ballyhoura Development Ltd	M

8.8.6 FOREST HOMES ANGLING FACILITY DEVELOPMENT

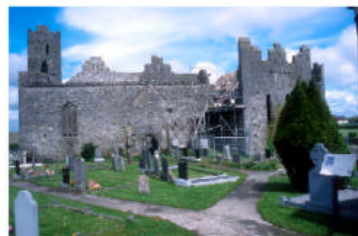
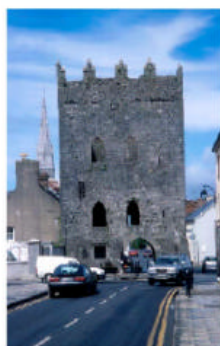
RECOMMENDATION 6

It is proposed to investigate the feasibility of developing angling facilities and other leisure facilities at the Forest Homes in Ballyorgan. The Molanna river which flows adjacent to the site is a tributary of the Blackwater and a brown trout stream.

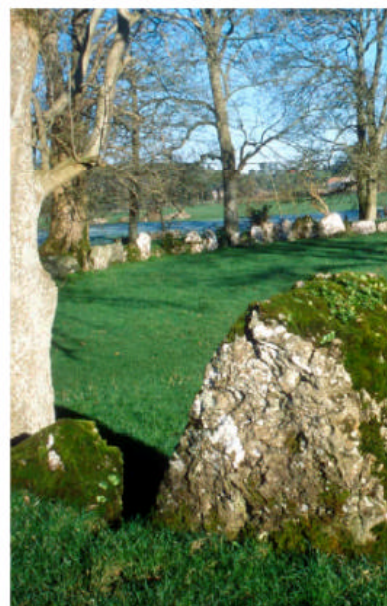
ACTIVITY	RESPONSIBILITY	TIMESCALE
<p>? Examine feasibility of developing artificial lake or sections of the stream for angling to include:-</p> <p>† fishing stands for children and physically challenged</p> <p>† loop walks from village to forest homes</p> <p>† the Molanna river walk</p> <p>† children's play facilities including outdoor slide</p> <p>† walks/trails for physically challenged</p> <p>† tennis courts, playing fields and crazy golf on site adjoining Forest homes.</p>	<p>Ballyhoura Development Ltd/ Coillte</p>	<p>S</p>

In this review, consideration will be given to the public access to each of these facilities and decisions made with regard to their inclusion within the Forest Recreation Area.

9.0 BALLYHOURA HERITAGE INITIATIVE



BALLYHORA HERITAGE INITIATIVE – LOUGH GUR



9. BALLYHOURA HERITAGE INITIATIVE

9.1 BACKGROUND

Ballyhoura has a wealth of heritage sites with great variety and depth. These include the ancient monuments of Lough Gur, castles and fortifications from almost every period of Irish history, a walled town, estates and mansions and attractive vernacular buildings and planned towns. In order to maximise tourism potential, the challenge is to cluster these and make them meaningful to the visitor, so that a stimulating, memorable and entertaining experience can be made available which will attract additional visits.

9.2 AIM & OBJECTIVE

9.2.1 AIM

The overall aim of the Ballyhoura Heritage Initiative is to provide an authentic rural heritage and cultural experience based on a hub and spoke system. It is the promoters' intention to offer a holistic experience to visitors which will be achieved through visitor orientation, imaginative interpretative techniques, supported by integrated signage and a range of literature.

9.2.2 OBJECTIVES

- ? To fully capitalise on Ballyhoura's competitive advantage and heritage strengths with a particular focus on the Bronze age, early Christian, medieval periods.
- ? To present Ballyhoura's rural/farming heritage through the 20th Century
- ? To cluster together compatible heritage sites and attractions
- ? To strengthen linkages between Ballyhoura's towns, villages and sites of archaeological/historical interest.
- ? To establish a centre of operations in Kilmallock which will serve as an interpretative hub for Ballyhoura's heritage product.
- ? To recognise the strategic importance which Lough Gur can play in underpinning Ballyhoura's heritage product.
- ? To develop and introduce an imaginative interpretative approach with particular emphasis on guiding and other forms of interpersonal contact with visitors.
- ? To establish an integrated signage strategy
- ? To prepare a detailed Heritage Management Plan.

- ? To establish an appropriate management and staffing structure to oversee the implementation of the Ballyhoura Heritage Management Plan.
- ? To provide opportunities for the local community to establish and develop business opportunities based on the heritage of Ballyhoura.
- ? To actively promote Ballyhoura as a rural heritage destination to the local community and visitors
- ? To work in close co-operation with Dúchas in the development of Kilmallock House as the orientation hub of Ballyhoura's Heritage product.

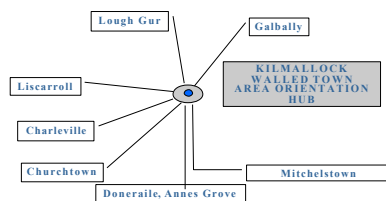
9.3 Overall Concept

9.3.1 HUB & SPOKE

The concept proposed is that Kilmallock should be developed as the interpretative hub of Ballyhoura's heritage product. Kilmallock is strategically located in the centre of the region and has a very strong built heritage appeal. Uniquely in the region, it is a walled town. Kilmallock will become a tourism hub, but equally important will be the radiating 'spokes' to important sites such as Lough Gur , Liscarroll, Charleville, Churchtown and other interesting sites.

The centre for development and interpretation in Kilmallock should be the important mediaeval town house which is now in the care of Dúchas. Dúchas has medium term plans for this site and these, together with the adjoining building, should form the core for orientating visitor to heritage sites in Ballyhoura. Parke's Castle in Co Sligo is an excellent example for Dúchas orientation centre for a wide and rich heritage area.

This is illustrated in the chart below:



9.3.2 HERITAGE THEMES

The Ballyhoura Heritage Initiative will have a number of themes., which will be developed to take account of the area's competitive advantages. Themes which will be developed include:-

- ? Settlement
- ? Farming
- ? Dwellings
- ? Lifestyles and beliefs
- ? Agitation and conflict

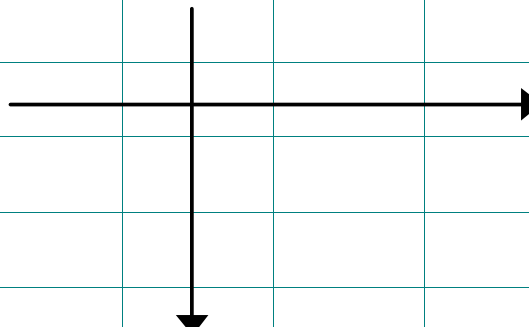
The presentation and interpretation of Ballyhoura's Heritage will focus on four historical periods:-

- ? Bronze Age
- ? Early Christian
- ? Medieval
- ? Ballyhoura in Modern Times (20th Century, 21st Century)

Visitors will be afforded the opportunity to explore each of these themes through time. Alternatively visitors who wish to concentrate on some or all of these themes during a particular period in history can do so.

BALLYHOURA HERITAGE INITIATIVE KEY THEMES & HISTORIC PERIODS

TIME ↓	THEME →	BRONZE AGE	EARLY CHRISTIAN	MEDIEVAL	MODERN
SETTLEMENT					
FARMING					
DWELLINGS					
LIFESTYLES AND BELIEFS					
AGITATION AND CONFLICT					



Symbols will be used to denote particular themes while colour coding will be used to identify relevant historical period.

The interpretative strategy will be of critical importance in ensuring that the visitor has a comprehensive understanding of Ballyhoura's heritage.

The flexible strategy employed will provide general holidaymakers with a general insight and understanding of the areas heritage, while special interest visitors will be furnished with the necessary materials and assistance thereby providing them with a comprehensive insight into their particular subject/area of interest.

9.4 PRELIMINARY DEVELOPMENT PLAN

The following plan sets out the product development and supporting actions which will be implemented under the Ballyhoura Heritage Initiative.

9.4.1 HERITAGE MANAGEMENT PLAN

RECOMMENDATION 1

The production of a five year Heritage Management Plan for the Ballyhoura Heritage Initiative. This will establish a logical framework for the implementation and management of the concept ideas set out in this document and other relevant ideas and proposals. Many of the activities set out in the recommendations in this report must be incorporated in the final plan.

ACTIVITY	RESPONSIBILITY	TIMESCALE
? Agree terms of reference for Management Plan	Ballyhoura Development/ Dúchas	S
? Undertake Heritage Management Plan	Ballyhoura Development / Dúchas	S
? Agree structures for implementation	Ballyhoura Development /Dúchas	S
? Renew, co-ordinate and provide advice on all signage and interpretation	Ballyhoura Development /Dúchas	S

9.4.2 INTERPRETATIVE HUB

RECOMMENDATION 2

The interpretative hub of Ballyhoura's Heritage initiative will be located in Kilmallock. Subject to agreement with Dúchas, the hub will be located in Kilmallock House in the medium to long term. In the short term, the hub will be located in the Dominican Abbey.

ACTIVITY	RESPONSIBILITY	TIMESCALE
? Discussions with Dúchas regarding medium/long term role of Kilmallock House	Dúchas / Ballyhoura Development Ltd	S
? Implementation of conservation measures for Kilmallock House	Dúchas/ Ballyhoura Development Ltd	M
? Establishment of Temporary Hub. Design and installation of interpretative/ orientation materials at the Abbey	Dúchas/ Ballyhoura Development Ltd	S
? Undertake a survey of Kilmallock House and appropriate archaeological investigations	Dúchas/ Ballyhoura Development Ltd	S
? Preparation of development plan for Kilmallock House	Dúchas/ Ballyhoura Development Ltd	M
? Restoration of Kilmallock House	Dúchas/ Ballyhoura Development Ltd	L

9.4.3 TOWNS AND VILLAGES

RECOMMENDATION 3

Ballyhoura has a rich array of planned towns and attractive villages which are essential ingredients of the Heritage cluster. Conservation, maintenance and interpretation will be required to ensure that Ballyhoura fully capitalise on the heritage potential offered through its towns and villages.

ACTIVITY	RESPONSIBILITY	TIMESCALE
? Undertake communication programme with residents of towns and villages appraising them of role in Ballyhoura Heritage Initiative.	Ballyhoura Development Ltd/Local Authorities	S
? Agree programme of landscaping improvements for towns and villages.	Ballyhoura Development Ltd/Local Authorities	S – M
? Agree programme of on-going maintenance and conservation measures for towns and villages.	Local communities / Local Authorities/ Ballyhoura Development Ltd	M – L
? Installation of signage in accordance with recommendations as set out	Ballyhoura Development Ltd / Local Authorities	M – L
? Installation of visitor information/interpretation in accordance with recommendations as set out	Ballyhoura Development Ltd / Local Authorities	M – L
? Undertake interpretation of Kilmallock walled town.	Dúchas / Local Authorities	S – M

9.4.4 SITES OF HISTORICAL AND ARCHAEOLOGICAL INTEREST

RECOMMENDATION 4

The provision of orientation, safe access and interpretation at sites of historical and archaeological significance.

ACTIVITY	RESPONSIBILITY	TIMESCALE
? Undertake baseline research with a view to prioritising sites of historic/archaeological interest. Sites to be classified in accordance with themes/periods as outlined in 9.3.2. to inform Management Plan	Ballyhoura Development Ltd / Dúchas	S
? Preparation of baseline research/text for interpretative panels.	Ballyhoura Development Ltd / Historian	S
? Consultation with local Authority and land owners regarding access to sites	Ballyhoura Development Ltd / Local Authorities	S – L
? Provision of safe access (roads/pathways etc) to sites	Local Authorities	M – L
? Provision of parking facilities at major sites	Local Authorities	M – L
? Installation of Interpretative Panels at sites	Local Authorities	S – M
? Design and production of supporting literature in accordance with recommendations as set out	Ballyhoura Development Ltd	S

9.4.5 LOUGH GUR

RECOMMENDATION 5

Within the context of the Ballyhoura Heritage Management Plan introduce a range of initiatives to capitalise on the strategically important Lough Gur cluster of archaeological sites which may include the following:-

ACTIVITY	RESPONSIBILITY	TIMESCALE
? Provide access to enclosures at Carraig Aille and Teampall Nua (New Church).	Ballyhoura Development Ltd/ Dúchas	M
? Provide access to stoneCircles	Ballyhoura Development Ltd/ Dúchas	M
? Prepare baseline research for Interpretative Panels	Ballyhoura Development Ltd/ Dúchas	S
? Design and deliver training programme for tour guides.	Ballyhoura Development Ltd/ Dúchas	S – M
? Installation of Interpretative Panels.	Ballyhoura Development Ltd/ Dúchas	M

ACTIVITY	RESPONSIBILITY	TIMESCALE
? Guided Tour 1* - Grange Stone Circle, New Church, Megalithic tomb, Carraig Aille, Lakefront (duration 2 hours)	Ballyhoura Development Ltd	S
? Guided Tour 2* - Self Guided Tour from Lough Gur Centre (duration 1.5 hours)	Ballyhoura Development Ltd	S
? Guided Tour 3* - Circumambulate lake (duration 4 hours)	Ballyhoura Development Ltd	S
? Provide access to Knockadoon	Ballyhoura Development Ltd	M
? Restoration of Bouchiers Castle	Dúchas	M – L
? Excavation of Bog Garden and Trail in Red Bog	Dúchas	M – L
? Investigate introduction of corrective measures to address problem of eutrophication and poor water quality on Lough Gur through the appropriate authorities as part of the Heritage Management Plan.	Ballyhoura Development Ltd	S
? Review the role of Lough Gur interpretative centre.	Ballyhoura Development Ltd /Shannon Development	S
? Complete Discussions with Limerick Co Council re re-opening Old Cork Road from Bruff to Holycross with possibility of link from Holycross to Lough Gur.	Local Authority	S

? Note: guided tours to be provided in association with Lough Gur Development Co-operative Society

9.4.6 DRIVING ROUTES

RECOMMENDATION 6

Building on existing initiatives in this area (Co. Limerick Driving routes), the Ballyhoura Heritage Initiative will feature a number of driving routes. Signposting and interpretation at key sites/locations of historic/archaeological interest will be provided to ensure that visitors are offered a full appreciation of the unique heritage of Ballyhoura.

ACTIVITY	RESPONSIBILITY	TIMESCALE
<p>? Undertake consultations with local authorities on driving routes. 3 routes proposed:-</p> <ul style="list-style-type: none"> † Slí Finn (existing) † Golden Vale Drive (existing) † Ballyhoura Drive (new) 	Ballyhoura Development Ltd/ Local Authorities	S
<p>? 24 outdoor interpretative panels have been prepared for Slí Finn and Golden Vale driving routes. Undertake installation of panels. Ensure co-ordination with other initiatives emerging from Management Plan.</p>	Local Authorities	S
<p>? Undertake base work/research for outdoor interpretative panels for Ballyhoura drive.</p>	Ballyhoura Development Ltd	S
<p>? Installation of panels for Ballyhoura Drive.</p>	Local Authorities	M
<p>? Update driving routes brochure to include Ballyhoura Drive</p>	Ballyhoura Development Ltd	S – M
<p>? Undertake consultations/liaison with communities in towns/villages to ensure awareness of driving routes initiative.</p>	Ballyhoura Development Ltd Local Authorities	S

9.4.7 WALKING AND CYCLING ROUTES

RECOMMENDATION 7

Develop a range of walking trails, loop walks and cycling routes

ACTIVITY	RESPONSIBILITY	TIMESCALE
? Maintenance and upgrading programme for Ballyhoura Way. † Styles † Re-gravelling † Maintenance	Ballyhoura Development Ltd	S
? Develop walking/cycling route link from Beara Breffni Greenway to Limerick City (from Kilfinane).	Ballyhoura Development Ltd/ Local Authorities	M
? Develop cycle routes from Cork City to Limerick City	Local Authorities	M – L
? Upgrading and replacement of signage for loop walks off the Ballyhoura Way.	Ballyhoura Development Ltd/ Local Authorities	M
? Undertake baseline research, mapping and text for loop walk cards at 25 locations	Ballyhoura Development Ltd/	S – M
? Liaison with individual towns to ensure that local / town trails are fully integrated with Ballyhoura walking / cycling routes.	Ballyhoura Development Ltd/ Local communities	S
? Monitoring and maintenance programme for loop walks	Ballyhoura Development Ltd	M – L

9.4.8 SIGNAGE

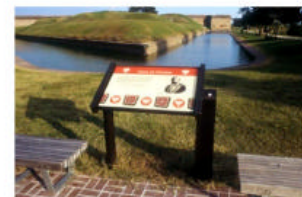
RECOMMENDATION 8

Introduce an integrated signage strategy. Design of signage will take into account the pilot branding initiative for Ballyhoura Country.

ACTIVITY	RESPONSIBILITY	TIMESCALE
? Review Kilmallock signposting initiative and appraise its suitability as a pilot signage initiative for Ballyhoura.	Ballyhoura Development Ltd	S
? Installation of road signage on approaches to all towns and villages. All signs should carry the Ballyhoura brand.	Local Authority	M
? Update area maps	Ballyhoura Development Ltd	S
? Identify locations for areas maps and install map boards.	Ballyhoura Development Ltd /Local Authority	M
? Design and installation of directional signage for sites of archaeological / historic interest.	Ballyhoura Development Ltd / Local Authority	M
? Design and installation of street signage	Ballyhoura Development Ltd / Local Authorities	M

Note: It is vital that within the Heritage Management Plan the design and location of all signage is carefully co-ordinated and integrated under the Ballyhoura Country brand name.

9.4.8 SIGNAGE



9.4.9 VISITOR INFORMATION

RECOMMENDATION 9

Provision of a suite of Ballyhoura Country branded visitor information materials

ACTIVITY	RESPONSIBILITY	TIMESCALE
? Design and installation of Ballyhoura Heritage orientation display at Dominican Abbey	Ballyhoura Development Ltd	S
? Design and production of a suite of branded brochures on driving routes, walking trails, loop walks and cycle routes.	Ballyhoura Development Ltd	S – M
? Production of Heritage Atlas	Local Authority	S – M
? Design and production of Product Providers Manual	Ballyhoura Development Ltd	S
? Provision of on-line information on website / D.M.S.	Ballyhoura Development Ltd	S

9.4.10 INTERPRETATION

RECOMMENDATION 10

The adoption of an inter-personal approach to the interpretation of Ballyhoura's Heritage.

ACTIVITY	RESPONSIBILITY	TIMESCALE
? Recruitment and training of a panel of individuals as Heritage Guides.	Ballyhoura Development Ltd	S
? Design and implementation of role playing as a means of interpretation at selected historic sites.	Ballyhoura Development Ltd / Friars Gate Theatre	S
? Provision of evening entertainment in the form of a show which will run 3-4 nights per week during peak season. Sponsor to be sought.	Ballyhoura Development Ltd / Friars Gate Theatre	M

10. SUPPORTING INITIATIVES CRITICAL TO SUCCESS

In order for the objectives of the Ballyhoura Attractions Cluster Development Strategy to be fully realised, there are a number of other interventions that will be required to support the Ballyhoura Forest Recreation Area and the Ballyhoura Heritage Initiatives. These are:-

- ? Addressing accommodation gaps
- ? Food and beverage provision
- ? Visitor entertainment provision
- ? Environment protection
- ? Addressing training needs
- ? Marketing of the Forest Recreation Area and Heritage products

Outline recommendations in respect of each of these areas are presented overleaf.

SUPPORTING INITIATIVES CRITICAL TO SUCCESS

ACTIVITY	RESPONSIBILITY	TIMESCALE
<p>? <u>ACCOMMODATION</u></p> <ul style="list-style-type: none"> † Grow the accommodation base overall † Development of larger guesthouses / hotels † Enhance quality of self-catering 	Private Sector	M – L
<p>? <u>FOOD</u></p> <ul style="list-style-type: none"> † Encourage use of local produce † Re-introduce ‘Taste of Ballyhoura’ initiative as ‘good food circle’ † Training in food preparation / presentation 	Private Sector / Ballyhoura Development Ltd	S – M
<p>? <u>VISITOR ENTERTAINMENT</u></p> <ul style="list-style-type: none"> † Production of Calendar of Events † Strengthen community events & festivals † Encourage pubs to provide traditional entertainment on roster basis † Theatre production / show † Encourage and promote open air dancing/sesiún at Ballivreena † Promote Mitchelstown music festival 	<p>Ballyhoura Development Ltd</p> <p>Ballyhoura Development Ltd</p> <p>Ballyhoura Development Ltd/ Private Sector</p> <p>Ballyhoura Development Ltd / Friars Gate Theatre</p> <p>Ballyhoura Development Ltd</p> <p>Ballyhoura Development Ltd</p>	<p>S</p> <p>S</p> <p>S</p> <p>M</p> <p>S</p> <p>S</p>

ACTIVITY	RESPONSIBILITY	TIMESCALE
<p>? <u>TRAINING</u></p> <p>Training required in following areas:-</p> <ul style="list-style-type: none"> † Local history/Archaeological knowledge † Guiding † Customer Care † Food preparation and presentation † Marketing 	Ballyhoura Development Ltd / Specialist Training Providers	S – M
<p>? <u>ENVIRONMENT PROTECTION AND ENHANCEMENT</u></p> <ul style="list-style-type: none"> † Encourage participation in tidy towns programme † Support programmes for the conservation of the national and built environment † Promote the principles of sustainability particularly in relation to new development † Promote the development of rural transport initiatives 	<p>Ballyhoura Development Ltd</p> <p>Ballyhoura Development Ltd</p> <p>Ballyhoura Development Ltd</p> <p>Ballyhoura Development Ltd</p>	S
<p>? <u>MARKETING</u></p> <ul style="list-style-type: none"> † Prepare 5 year marketing strategy † Encourage co-operative initiatives under Ballyhoura Country brand 	<p>Ballyhoura Development Ltd</p> <p>Ballyhoura Development Ltd</p>	S

Capacity/Capacity Utilisation

The implementation of this project will greatly extend Ballyhoura's capacity to cater for visitors. The study area current attracts an estimated 28,000 visitors. The initiatives proposed are aimed at strengthening Ballyhoura's tourism infrastructure.

Subject to the implementation of the proposals in full, Ballyhoura will be in a position to cater for new markets/market segments (ie. visitors with an interest in Heritage/Culture, special interest holiday markets etc.).

Capacity is dependent on a number of considerations including:

- ✍ Accommodation capacity
- ✍ Timing of development of proposed facilities
- ✍ Private sector response to opportunities created
- ✍ Seasonal extension (ie. Take up of Ballyhoura County Holiday Packages)

The implementation of the development plan is very likely stimulate the required response from the private sector. In these circumstances, the Ballyhoura area has the capacity to comfortably double current visitor numbers over the period of the plan.

11. ORGANISATIONAL STRUCTURE

For this vision to become a reality then a number of key actions are required. Clearly the delivery and management of such a facility will require a partnership approach with all key members agreeing to an overall management structure and plan.

11.1 MANAGEMENT ORGANISATION

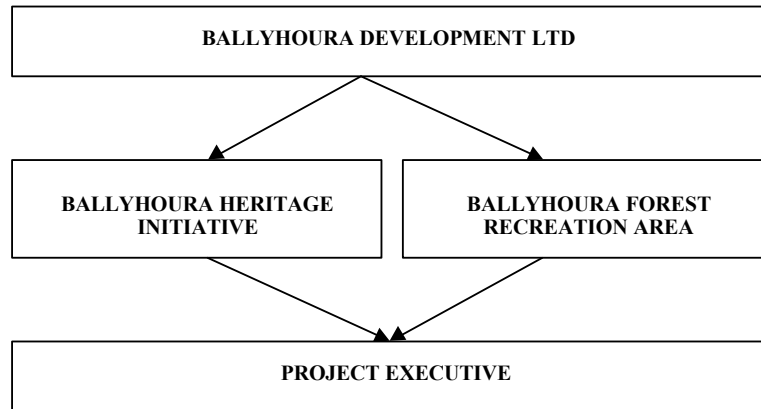
It is envisaged that the following organisations will need to be involved in the Project.

- ? Coillte
- ? Limerick County Council
- ? Cork County Council
- ? Ballyhoura Communities
- ? Ballyhoura Development
- ? Ballyhoura Failte
- ? Cork Kerry Tourism
- ? Dúchas
- ? Shannon Development

A partnership involving many of these organisations effectively exists through Ballyhoura Development Ltd, there is no requirement to set up new structures if additional members can be added.

A sub committee or steering group of Ballyhoura Development Ltd has been established to progress the proposals as set out in this document

**TABLE 6: BALLYHOURA ATTRACTIONS CLUSTER
MANAGEMENT STRUCTURE**



Management plans will be required to guide the policy, strategy and actions relating to both projects in harmony with Coillte's and Dúchas own policies.

A full-time project executive will be appointed to implement the strategic recommendations arising from the Management Plan. This individual will be accountable to Ballyhoura Development Ltd. The cost has been associated with employing a project executive for the duration of the programme have been taken into account and is set out in Chapter 13.

12. MARKETING STRATEGY 2003 - 2007

12.1 OVERALL

Market research indicates that all of Ireland is seen by overseas markets as a rural tourism destination.

In order for Ballyhoura Country to raise its' profile and stimulate further tourism growth to gain market share, new products and shifts in marketing emphasis are required. The implementation of the two major initiatives outlined in this strategy,(Ballyhoura Forest Recreation Area; Ballyhoura Heritage Initiative), will greatly strengthen Ballyhoura Country's tourism product offer and broaden its' appeal as a destination for visitors.

This section of the report outlines the way in which the two new 'product' initiatives will be promoted to priority markets and market segments over the next 5 years.

12.2 MARKETING OBJECTIVES

The marketing objectives relating to the Ballyhoura Country Attractions Cluster for the next three years are as follows :-

- ? To create awareness of Ballyhoura Country and raise its' profile as a quality rural tourism destination in both the domestic and overseas markets.
- ? To build on the Ballyhoura Country brand name, and to capitalise on the significant work which has been undertaken to date in relation to the development of Ballyhoura's brand identity.
- ? To market the two new product initiatives,(Ballyhoura Forest Recreation Area; Ballyhoura Heritage Initiative), with a view to differentiating Ballyhoura from other rural tourism destinations in Ireland.
- ? To build relationships with the travel trade so that the take up of the new product initiatives is maximised.
- ? To market the new portfolio of tourism products as part of joint marketing initiatives with Shannon Development, Cork-Kerry Tourism, Coillte and Dúchas.

12.3 TARGET MARKET / MARKET SEGMENTS

The marketing strategy outlined overleaf will be focussed on the target markets and market segments as set out in Table '6' below.

**TABLE 7 : BALLYHOURA COUNTRY ATTRACTIONS CLUSTER
TARGET MARKET / MARKET SEGMENTS**

TARGET MARKETS ↓	SEGMENTS →	INDEPENDENT HOLIDAYMAKERS (GENERAL)	CULTURAL/ HERITAGE INTEREST	INCENTIVE	SPECIAL INTEREST (ARCHAEO- LOGY ETC)	EDUCA- TIONAL	STUDY TOUR GROUP S	ACTIVITY
? REPUBLIC OF IRELAND		✍	✍		✍	✍		✍
? NORTHERN IRELAND		✍	✍		✍	✍		✍
? NORTHERN EUROPE (BENELUX, GERMANY, FRANCE)		✍		✍	✍	✍	✍	✍
? SCANDINAVIA				✍	✍	✍	✍	✍
? UNITED STATES		✍	✍	✍			✍	
? OTHER MARKETS		✍	✍	✍	✍		✍	

12.4 STRATEGY TO ACHIEVE OBJECTIVES

The strategy to achieve these objectives will be as follows:-

- ? An expanded press and public relations campaign (Ireland, Britain and Europe)
- ? A continued high profile advertising joint campaign, refocused on defining the Ballyhoura experience as a quality rural tourism experience
- ? An expanded internet campaign, re designed to deliver bookings
- ? Ballyhoura holiday packages. One week and week-end holiday breaks for special interest and activity holidaymakers
- ? An expanded travel trade campaign in partnership with the industry (direct mail, joint marketing, sales calls, familiarisations, travel trade shows) (Britain and Europe)

- ? Ballyhoura presence at key consumer shows (Ireland and Britain)
- ? Consumer promotions (Ireland, Britain and Europe)
- ? Database marketing for special interest products jointly with other counties
- ? Collaborative marketing with Coillte, Dúchas, Shannon Development and Cork Kerry Tourism

12.4.1 PRESS AND PUBLIC RELATIONS

A PR specialisation will be developed within Ballyhoura Fáilte. The brief will be to highlight the Forest Recreation Area and the Heritage Initiative as the Ballyhoura Country holiday experience and quality product therein. Tourism Ireland's PR agencies overseas will be targetted.

12.4.2 ADVERTISING CAMPAIGN

Press and radio will be the main conventional media used. Internet advertising will also, however, be a key component of the new brief. The campaign will target Britain and Ireland and be run in conjunction with Bord Fáilte and other appropriate partners to maximise effect. (The internet campaign will have a worldwide reach).

12.4.3 DEVELOPMENT AND PROMOTION OF BALLYHOURA COUNTRY HOLIDAY PACKAGES

A key feature of the marketing strategy will involve the promotion of holiday packages. Branded holiday packages to be developed will be themed around recreation and heritage. For an all-inclusive price, visitors will be offered accommodation and an activity. The latter could include a mountain biking event, attendance at a festival or other form of entertainment, a programme of guided historic walks etc.

Significant work will be involved on the ground working with the accommodation providers and activity providers in the design of the holiday packages.

12.4.4 INTERNET MARKETING

The Ballyhoura Country website (www.ballyhouracountry.com) is a high quality site which provides information on Ballyhoura, its' towns and villages, visitor attractions, festivals, events and entertainment. Visitors to the site are also afforded a range of accommodation options from which to choose.

(i) Site Updating

The Ballyhoura Country brand and corporate identity is, in consultants' opinion, of a high quality.

Websites however are only the first step in an internet marketing campaign. Regular (weekly or at least monthly) updating is essential. The website will be updated to incorporate information on the two new product initiatives, the Ballyhoura Forest Recreation Area and the Ballyhoura Heritage Initiative. Online newsletters will be available to encourage brand loyalty. The level of content will also be increased steadily while also ensuring good design allows the site to be easily navigable and quickly downloaded.

(ii) Holiday Packages

The website will represent the ideal vehicle for the promotion of the Ballyhoura Country Holiday Packages. Visitors to the site will be able to draw down information on a range of package holiday options and book directly on-line (see (iv) below).

(iii) Public Relations

A range of tourism publications and tourism web related journalists will be emailed with press releases on a regular, scheduled basis as the site is expanded. The site will be submitted to journalists for review.

(iv) On-line Bookings

A facility to book on-line is essential. The dimension will be developed through a stronger link with Shannon Development, Gulliver; a commercial site (eg www.bookassist.ie), or by developing a booking facility directly. Options will be investigated.

(v) Industry training

An e-enablement training module will be developed for the tourism industry in Ballyhoura.

12.4.5 TRAVEL TRADE CAMPAIGN

The travel trade campaign must be developed in close co-operation with Tourism Ireland. It should target journalists to feature quality Ballyhoura Country products in feature articles. This is a key element of the awareness building requirements of the brand, and should have considerable resources devoted to it.

12.4.6 TRADE AND CONSUMER SHOWS

A list of consumers shows will be agreed each year in co-operation with Shannon Development and Cork Kerry Tourism. The objective should be to maximise distribution at reasonable cost. Quality Ballyhoura Country product providers will be invited to assist in this exercise. Shows to be attended are likely to include

Bord Fáilte Workshops
Holiday World (Dublin, Cork, Belfast)
Holiday (Manchester, Glasgow)

World Travel Market (London)
ITB (Berlin)
Special interest consumer shows (mostly Britain)

12.4.7 CONSUMER PROMOTIONS

Ballyhoura based companies, and other companies who wish to be associated with the quality Ballyhoura Country rural tourism experience, should be targetted to run “on pack” promotions for Ballyhoura Country holidays.

12.4.8 SPECIAL INTEREST / ACTIVITY HOLIDAYS

In partnership with neighbouring counties, a professional database should be established for special interest and activity products. The portfolio of Ballyhoura Country special interest branded literature will continue to be developed for direct mail purposes. External mailing lists will also be purchased. A concerted effort will be made to run joint campaigns with selected special interest and activity holidays tour operators. These joint campaigns will include:

- † Packaging
- † Advertising
- † Internet Linkage
- † Promotions
- † Brochure features
- † Booking service and commission (through the tour operator)

The following products should be featured:

- † Walking
- † Cycling
- † Mountain biking
- † Farmhouse Holidays
- † Culture, Heritage and the Arts
- † Archaeology
- † Ecology and Environment

The emphasis should be on high quality, Bord Failte approved operators and the objectives will be to encourage the selected tour operators to package and sell Ballyhoura Country products.

12.5 CAMPAIGN TARGETS

The targets for the marketing campaign should be as follows:

? **Awareness**

A benchmarking survey of awareness of Ballyhoura Country should be undertaken on an annual basis. This will track awareness in markets where advertising and promotional activity has been heaviest and amongst the travel trade. The target will be to see a steady rise in awareness. A simple survey will be commissioned independently from a specialist market research firm.

? **Advertising effectiveness**

Follow-up market research should be undertaken amongst advertising respondents, to establish motivations and conversion levels to actual holiday bookings.

? **Travel Trade**

Ballyhoura Country products featured by the travel trade should be tracked through brochure monitoring. The target should be to see Ballyhoura Country products prominently featured in five additional mainstream tour operator brochures.

? **Special Interest**

Three special interest Ballyhoura Country products branded promotions should be undertaken with partners by 2003. These will be in the areas of walking, mountain biking, heritage and culture, archaeology.

? **Rural Tourism Training**

A training programme should be developed for Ballyhoura Country. This should see a network of rural tourism co-ordinators and quality product established and should be progressed in consultation with CERT, LEADER and other potential partners.

12.6 MARKETING BUDGET

A marketing budget of € 250,000 over five years is proposed

Marketing Budget €	2003	2004	2005	2006	2007
Print	15,000	5,000	10,000	5,000	5,000
Design/ Development of Holiday Packages*	-	-	-	-	-
Press and PR	5,000	5,000	6,000	6,000	6,000
Internet (incl. Joint campaigns)	10,000	10,000	12,000	12,000	12,000
Advertising	10,000	10,000	12,000	12,000	12,000
Trade Shows/Promotions	7,500	5,500	4,000	4,000	7,000
Research	-	5,000	-	5,000	-
Direct Mail	2,500	2,500	3,000	3,000	5,000
Distribution	5,000	2,000	3,000	3,000	3,000
TOTAL € 000	55,000	45,000	50,000	50,000	50,000

* Development of holiday packages to be undertaken by project executive in association with local product providers.

13. PROJECT COST AND FUNDING

13.1 PROJECT COSTS

These cost estimates presented are based on the two concept plans recommended in this report. No detailed survey work or design input has been undertaken at this stage and therefore the costs set out are for budget purposes only at this stage. The prices are exclusive of VAT.

13.1.1 BALLYHOURA MOUNTAINS FOREST RECREATION AREA

TABLE 8 : BALLYHOURA FOREST RECREATION AREA ESTIMATED COSTS

	€ 000
? Ballyhoura Forest Recreation Area Management Plan	€ 50
? Ballyorgan Feasibility Study	€ 15
PROGRAMME OF WORKS	
? Glenosheen	
– carpark (improvements)	€ 25
– picnic site	€ 25
– play area	€ 50
– toilets	€ 100
– signage/information	€ 10
– hire unit	€ 30
(possible private sector)	€ 240
? Garrane	
– carpark (improvements)	€ 25
– toilets/changing	€ 180
– signage/information	€ 10
– hire unit/2 No	€ 30
	€ 245
? Castlepook	
– carpark (improvements)	€ 25
– toilets	€ 100
– picnic site	€ 25
– signage/information	€ 10
	€ 160
? Access (B & C Sites)	
– carpark (improvements)	€ 25
– picnic tables/seats	€ 10
– signage/information	€ 5
8 No @ €40K	€ 40
	€ 320
? New long distance paths	€ 240
? Internal signs/way markers etc	€ 60
? Special course provision (mountain bike routes etc)	€ 70
? Professional Fees	€ 150
TOTAL	€ 1550

**13.1.2 BALLYHOURA HERITAGE INITIATIVE
(Based on Recommendations)**

TABLE 9 : BALLYHOURA FOREST RECREATION AREA ESTIMATED

	€ 000*
? Heritage Management Plan	€ 50
<u>PROGRAMME OF WORKS</u>	
? Temporary Interpretation at Abbey	€ 75
? Signage Information	€ 45
? Access Parking Interpretation/ Literature (10 locations)	€ 200
? Lough Gur General Improvements (access and information)	€ 150
? Driving Routes	€ 75
? Walking Cycling Routes	
† Ballyhoura upgrade	€ 75
† Signage	€ 25
? Signage Maps Information	€ 50
? Visitor Information Materials	€ 75
? Interpretation (also see other recommendations)	€ 50
? Legal and acquisition	€ 100
? Professional Fees	€ 75
<u>TOTAL</u>	€ 1045

* Note : Kilmallock House Restoration costs not included. This will require detailed investigation/survey plans etc and would be reviewed under the management plan.

13.1.3 OTHER COSTS

TABLE 10 : OTHER COSTS ASSOCIATED WITH PROJECT

	€ 000
? Marketing Plan (5 years)	€ 250K
? Training (5 years)	€ 100K
? Staffing (Project executive (5years))	€ 250K
TOTAL	€ 600

13.1.4 SUMMARY OF PROJECT COSTS

The estimated project costs for the Ballyhoura Attractions Cluster project can thus be summarised as follows:-

TABLE 11: BALLYHOURA ATTRACTIONS CLUSTER – PROJECT COSTS SUMMARY

	€ 000
? Ballyhoura Forest Recreation Area	€ 1550
? Ballyhoura Heritage Initiative	€ 1045
? Other Costs	€ 600
TOTAL COSTS	€ 3195*

* Project cost estimates are exclusive of VAT.

13.2 PROJECT FUNDING

The promoters of the project Ballyhoura Development Ltd, have submitted an outline grant application under the National Development Plan, Tourism Product Development Scheme.

Discussions have taken place with Coillte, Dúchas, Cork Co. Council and Limerick Co. Council, and all have responded positively and have given their support in principle to the project. More detailed discussions regarding the involvement and commitment of each of the above parties will be required, and will be addressed during the preparation of the detailed management plans.

**TABLE 12 : BALLYHOURA COUNTRY ATTRACTIONS CLUSTER
PROJECT FUNDING**

		€ 000*
? Coillte	}	€ 1597.50 (50%)
? Dúchas		
? Ballyhoura Development Ltd		
? Cork Co. Council		
? Limerick Co. Council	}	€ 1597.50 (50%)

? GRANT (Tourism product development scheme)		
TOTAL		€ 3195

13.3 INCOME AND EXPENDITURE PROJECTIONS

Ballyhoura Development Ltd is a not-for-profit organisation that is providing important public sector tourism infrastructure for the area. The organisation will not be involved directly in operational arrangements and therefore there will not be annual income and expenditure operational activities for the project.

13.4 EMPLOYMENT

It is currently estimated that each million of out-of-state tourism expenditure in Ireland supports 30 jobs and every million euro of domestic tourism spend supports 24 jobs. On this basis, it can be estimated that tourism in the Ballyhoura area currently sustains 190 jobs.

Assuming current levels of visitor expenditure are maintained, and that visitor numbers to Ballyhoura increase by 50% following the implementation of the Ballyhoura Attraction Cluster Development Strategy, by 2007 it can be estimated that there will be almost 300 full time job equivalents (ETEs) supported by tourism in the study area.