

BALLYHOURA COUNTRY 2020

THE WAY FORWARD



BALLYHOURA COUNTRY AREA TOURISM DEVELOPMENT AND MARKETING STRATEGY AND PLAN TO 2020:

ECONOMIC IMPACT, PERFORMANCE, TRENDS, STRATEGY AND ACTION PLAN

PREPARED ON BEHALF OF



By



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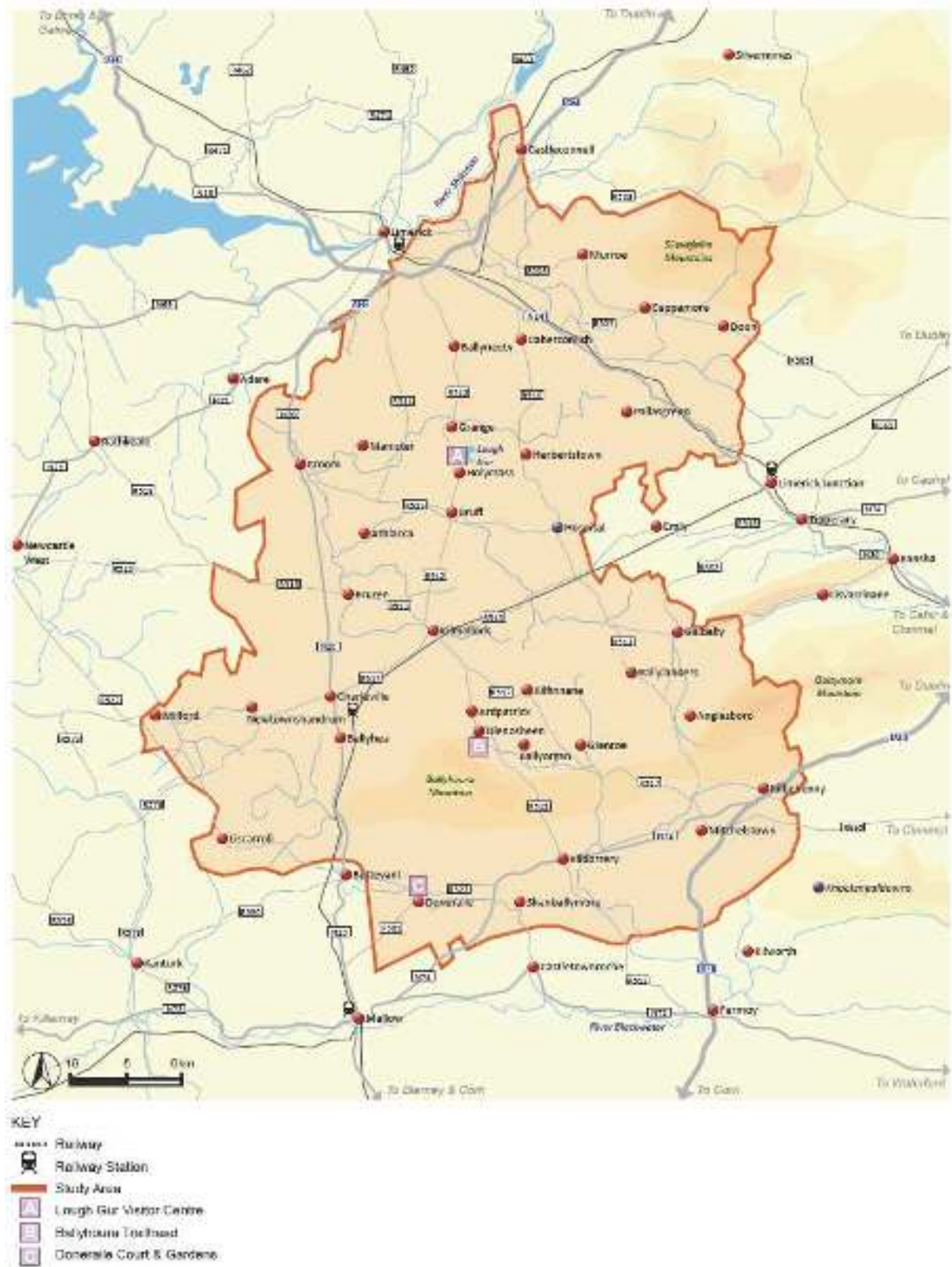
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Executive Summary

Map 1: Study Area Context



Map 2: Ballyhoura Country Study Area Overview



Need for the Plan

The Tourism Plan delineating “The Way Forward” for Ballyhoura Country is needed on four levels:

- To establish strategies and plans for new product/experience opportunities in order to establish the region as a premier tourism destination in Ireland,
- To identify and elaborate the communications methods and tools through which awareness of the tourism products/experiences of Ballyhoura Country can be increased, and interest and demand for visits to the area stimulated,
- To outline the ways in which cooperation and coordination can be created with administrations and the tourism private sector in areas surrounding Ballyhoura Country, and
- To identify mechanisms and actions to improve the integration of the tourism product/experience offering across Ballyhoura Country involving clustering and networking between providers and suppliers.

This plan:

- Sets out the vision for tourism which addresses the needs of the industry, the community and our visitors
- Provides a framework for, and a commitment to doing what is manageable in the pursuit of, the vision
- Increases the profile of tourism in Ballyhoura within Ireland, and ensures that key decision makers are aware of its importance and potential
- Ensures that resources for tourism are effectively marshalled
- Eradicates ad hoc policy and decision-

making and informs the decision making of local tourism businesses and partner organisations

- Provides a mechanism for evaluating the effectiveness, efficiency and value for money of Ballyhoura Fáilte activity, in the areas of tourism and leisure management, development and promotion
- Outlines a series of development projects to be subject to planning and environmental assessment and the availability of funds.

Ballyhoura is a component region within the Munster Peaks study area for which a Concept Development and Feasibility Plan was prepared in April 2014 under the proposed designation of the Great Southern Mountain Park. That Plan has been approved and a company established to implement its programme of proposed actions. The approach used in this Ballyhoura Study has been to develop proposals that are consistent with, and achieve maximum benefit from, the strategies and actions in that Plan, while achieving a clear identity and positioning for the Ballyhoura region in its own right. The Action Plan is formulated in such a way that specific proposed actions can be undertaken through the company established to implement the Munster Peaks plan.

While there is some degree of repetition in the broader and Ballyhoura-specific plans, these occur only where there is maximum gain for Ballyhoura from pursuing such strategies and courses of action.



A. Vision, Proposition and Key Strategies

The proposed vision statement for Ballyhoura Country over the period to 2020 is:

To firmly establish Ballyhoura Country as an outstanding Tourism and Recreational destination in the Heart of Rural Munster offering an exceptional range and quality of experiences in outdoor activity pursuits, and living and built cultural heritage that will bring significant socio-economic benefits to the residents and businesses of the area and a better experience for the visitor.

The destination proposition relates to the variety and quality of product experiences available to visitors – not trying to be all things to all people, but meeting the varied expectations of the target market segments to a high standard.

There are two principal target visitor segments:

1. **Sightseeing and Culture Seekers:** those who want to combine experiences in the natural environment of the area (e.g. “soft” adventure walks involving fine vistas over the countryside) with the built heritage (e.g. visiting features like Doneraile and Lough Gur) and interaction with the people of Ballyhoura and their lifestyle (e.g. eating food with a local provenance, experiencing traditional entertainment), and doing these things on successive days during their visit.
2. **Adventure/Activity Enthusiasts:** those seeking the opportunity to engage in their chosen outdoor pursuit through an extensive range of well-coordinated and delivered activities and supporting facilities, with particular emphasis on mountain biking, walking/hiking and equestrian.

There are twin goals:

1. to broaden the appeal of Ballyhoura as a destination for the key international market segment of Sightseeing and Culture Seekers.
2. to increase market penetration in the Adventure/Activity market segment,

To realise the proposed vision and the associated goals there are five recommended key strategies for Ballyhoura Country over the 2015-2020 period. These follow best international practice for destination development and form the foundation for the action plan.

Key Strategy 1: The Team Approach – Increasing Collaboration, Partnership & Buy-in

Key Strategy 2: Developing Signature Attractions, Increasing Things to See, and Upgrading Outdoor Activities

Key Strategy 3: Providing a High Quality Visitor Experience

Key Strategy 4: Destination Marketing – Focusing on Each Segment and Sector

Key Strategy 5: Using Digital Technology to Generate Business and Increase Brand Awareness

Key Strategy 1: The Team Approach – Increasing Collaboration, Partnership & Buy-in

Principal components are:

- Use of **community champions** to communicate the story of the destination and garner support,
- **Programme of activities around the region** to present the opportunities and contribution of tourism, demonstrating the benefits of tourism to all sections of society, and building a sense of pride and unity among stakeholders and communities,

- Use of **fund raising mechanisms** (through majority commercial operation funding) designed to generate sufficient funds to permit Ballyhoura Failte to conduct well-designed and full destination marketing campaigns,
- Close **study of successful examples** of obtaining wide and extensive collaboration in, and buy in for, tourism e.g. Burren Geopark,
- Close **coordination with, and maximum involvement in, the implementation programme of the Munster Peaks project**, and work closely with the other component destinations (e.g. Glen of Aherlow) in the implementation of the proposed development and marketing programme to ensure Ballyhoura is both fully incorporated and featured in the activities undertaken,
- **Cluster up with the gateway centres** in its neighbouring regions, such as Limerick,
- **Enrolment of Individual tourism enterprises in the various sectors of the industry in the relevant national representative body**, and
- Ballyhoura Failte and individual self-catering enterprises **partnership with leading marketing group** for the sector in undertaking a Destination Ballyhoura campaign reaching over 100,000 Households in Ireland.

Key Strategy 2: Developing Signature Attractions, Increasing Things to See, and Upgrading Outdoor Activities

To meet the needs and expectations of the target market segments, a more extensive, upgraded and coordinated range of tourism products/experiences will be required to be developed in Ballyhoura.

To realise the potential of the Sightseeing and Cultural heritage segments, extensive use in the product/ experience development proposals is made of the hub and spoke concept. Visitors are drawn into the destination by a major attraction, and then encouraged to stay longer and travel around other features in the area through well-structured itineraries/ touring routes of clustered attractions and activities. This requires ensuring both that the signature attractions are sufficiently powerful to bring in visitors, and that the touring routes provide a sufficient number of well-delivered features.

Such features should comprise a variety of natural sights and cultural heritage elements that reflect the character and distinctiveness of Ballyhoura e.g. local cuisine, traditional music and dance

In order to take full advantage of Ballyhoura's outstanding success in developing mountain biking and establish its reputation as a premier location for all forms of outdoor pursuits, attention is needed to increase and improve the area's offer in other forms, in particular walking/hiking and equestrian activities. The Walking Festival should be upgraded, while major equestrian trails and events are needed to establish Ballyhoura's reputation as a premier location for such activities.

Map 8: Tourism Product Clusters



KEY

- Railway
- Railway Station
- Study Area
- Lough Gur Visitor Centre
- Ballyhoura Trailhead
- Doneraile Court & Gardens

- 1 The New Church, Lough Gur (1678)
- 2 Great Stone Circle (2000BC)
- 3 Friars Gate Theatre
- 4 Collegiate Church (13th Century)
- 5 Kilmallock Friary (1291)
- 6 Kilmallock Museum
- 7 King John's Castle

- 8 Ballyhoura Trailfinders
- 9 Cush Earthworks (1000BC)
- 10 Kilmallock Outdoor Education
- 11 Doneraile Playground
- 12 Kilmallock Hostel
- 13 Doneraile House Hotel
- 14 Cragh House

Key Strategy 3: Providing a High Quality Visitor Experience

In recognition of the importance of the human factor in the visitor experience, high priority should be given to vocational and management training programmes, and community awareness activities. The warmth of a host destination towards its visitors can be enhanced through: welcome signage at gateways into the region and in its towns; local guides and storytelling in way that is differentiated and distinctive to the area; and evening and other activities which welcome visitors that celebrate the area's distinctiveness – in Ballyhoura's case its rural cultural heritage.

Key Strategy 4: Destination Marketing – Focusing on Each Segment and Sector

The visitor flow to Ballyhoura has three components: day trippers, domestic overnights, and international. Marketing needs to be targeted at each of these broad segments through the most relevant agencies.

Separate marketing approaches are needed both for these segments and the different accommodation sectors, divided between what Ballyhoura Fáilte can do itself and what it will need to rely on the national agencies for.

Marketing for the different accommodation sectors should be a partnership between Ballyhoura Fáilte and individual operators with relevant trade associations ("mother ships"), large marketing groups to partner with/piggyback on, and the Munster Peaks programme.



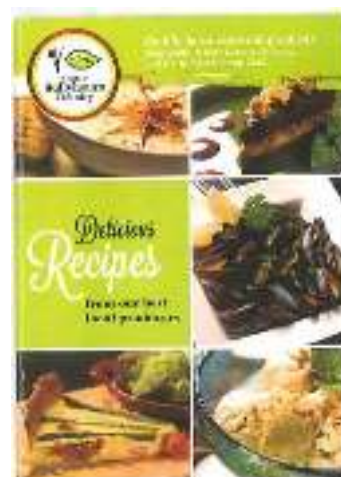
Key Strategy 5: Using Digital Technology to Generate Business and Increase Brand Awareness

Ballyhoura will be increasingly dependent in coming years on its effective use of digital marketing to attract its targeted level of visitors, needing to implement a digital strategy which has the potential to be cost effective, innovative, focused and fully geared to meeting consumers' planning and booking needs.

Having websites of the highest quality is an imperative both for Ballyhoura Fáilte and individual tourism providers in the region. These should be designed to fully meet the requirements of the five stages of the Digital Consumer Journey, as developed by Fáilte Ireland.

Prospective visitors need to be able to make reservations without coming out of the VisitBallyhoura website. A direct online booking link to service providers in the region is vital, while possible partnerships with online booking organisations should be explored.

Posting blogs and other material on the social media sites, as well as its own website, can enable Ballyhoura Fáilte to be perceived as both relevant and up-to-date. The TripAdvisor button should be on Ballyhoura destination and operators' websites so consumers can see how past customers assess the region and its products/experiences.



B. Market Potential

Ballyhoura represents a microcosm of Ireland's general offering of beautiful scenery, friendly people, primarily rural and offering rest and relaxation. However, it lacks distinctiveness, without the recognition of other regional offerings such as West Cork, the Blackwater valley, Bunratty, the Shannon River, or other close by destinations like the Ring of Kerry, Dingle Peninsula or West Clare.

While the overall popularity of the South-West, Shannon and the South-East regions among both overseas and domestic holidaymakers offer a substantial potential for Ballyhoura to tap into, this lack of recognition or identification with the area means that it must work hard to achieve a share of the region's tourism.

Ballyhoura's attributes must be built on to establish its differentiation and grow a reputation as a premier destination. These attributes are:

1. the major cultural heritage features that draw visitors into the area i.e. Doneraile and Lough Gur.
2. its success in developing the mountain biking product, and

Sightseers and Culture Seekers are the main tourism potential for Ireland and Ballyhoura and it is estimated that there are 20 million potential tourists in Ireland's four main overseas markets. The segment is characterised by a sense of exploration, a willingness to engage, and a desire for authentic new experiences. Typically they are ABC1, married and older. They tend to take many short breaks and longer rural holidays. Beautiful scenery and things to see and do are key considerations for a holiday in Ireland, also exploring small towns and villages and local history and culture.

Though the mountain biking segment is relatively small, the reputation created through Ballyhoura's success in catering for the segment provides the opportunity to develop a suite of outdoor activities of comparable quality, thereby establishing for itself the perception in the marketplace of being a premier destination for such pursuits. These appeal not only to the dedicated Adventure/Activity Enthusiast but also Day Trippers and visitors in the various Sightseeing and Culture Seekers segments (e.g. Great Escapers/Scenic Relaxers).

For example, Hiking/Cross-country walking was the most popular active pursuit in visitors to the Ballyhoura area, engaged in by 15% of visitors, one of four of whom said that the walking led to their choice of Ireland as their holiday destination. Hiking and walking is a popular activity among domestic holiday takers with 22% engaging.



C. Pressing Challenges

Support for the expansion and upgrading of the tourism sector in a rural area like Ballyhoura necessitates:

1. investment in the region's infrastructure, products/experiences, human resources, and destination marketing;
2. close collaboration, integration and support at local, regional and national levels;
3. effective communication with its target markets and segments to create awareness of, and generate interest in, the destination.

The primary challenges are, therefore, in respect of:

1. finance to undertake the strategies, developments and actions outlined in this plan;
2. close Ballyhoura Fáilte relations with its local stakeholders, county councils and the national tourism agencies;
3. marketing communication.

Each of these challenges are addressed through the strategies outlined and the 14 action programme proposed to take Ballyhoura Country through to a successful period to 2020.

D. Target Market Segments and Economic Impact

The markets and segments to be targeted through the programme of product/experience development and marketing strategies and action programmes are summarised related to the broad product/experience category in the matrix below.



Product Market Matrix

Markets/market segments Product/ Experiences	Domestic (Ireland)		International (focus on Britain, France, Germany, other Europe, US)				All Markets		
	Recreation day trips	Overnight or longer holidays inc. Footloose Socialisers	Sightseers & Culture Seekers				Adventure/Activity Enthusiasts	Coach Tours	Special interest (e.g. reverse genealogy)
			Culturally Curious	Great Escapers/Scenic Relaxers	Social Energisers	Nature Lover			
OUTDOOR ACTIVITIES									
Walking/hiking	*	*	*	*		*	*	*	*
Cycling (inc Mountain Biking)	*	*		*			*		
Other outdoor activities (equestrian, angling, on water, geocaching etc)	*	*		*			*		
Nature – soft adventure, bird watching, etc	*	*	*	*		*			*
Events/Festivals	*	*	*	*	*	*	*	*	*
CULTURE/HERITAGE									
Built heritage/sites (day visits)	*	*	*	*	*	*		*	*
Events/Festivals	*	*	*	*	*	*		*	*
COMBINED OUTDOOR/ & HERITAGE									
Ballyhoura Experience Touring Routes		*	*	*		*		*	*

In order to define targets for visitor arrivals, spending and employment, TDI applied national forecast growth rates for the period to 2020 factoring these up by 10% in anticipation of the successful implementation of both the plans for the Munster Peaks (Great Southern Mountain Park), and this present one for Ballyhoura Country.

Total revenue targets for Ballyhoura for 2016 are between €50 and €55 million; while by 2020 the target is approaching €62 million. Applying the Fáilte Ireland standard coefficient of 36 jobs created by each €1 million of visitors spending, suggests an employment base in excess of 1,500. By 2016, the region could support between 1,500 and 2,000 jobs, while by 2020 employment from tourism should be between 2,200 and 2,300 if the target revenues are achieved.

E. Ballyhoura Country Institutional, Development and Marketing Action Plan

A set of 14 institutional, product development and marketing programmes have been set out for the effective implementation of the key strategies proposed for Ballyhoura Country over the period 2015 to 2020.

Programme 1: Ballyhoura Fáilte Operation & Funding

The aim of the programme is to ensure Ballyhoura Fáilte becomes largely self-financing over the period of the plan, with the reduced public sector funding unlikely to change in the medium term. This includes actions regarding:

- **payment of a subscription fee**, which will contribute to the cost of, and facilitate, Ballyhoura's marketing, development and training services,

- **sourcing of external grants funding and sponsorship** (which is a continuation of the current successful strategy) through the period of this strategy,
- **targeted marketing management systems and processes**, which will enable community managed attractions and facilities to continue to be run with guidance from Ballyhoura Fáilte,
- consideration of the use of an **asset management system** reflecting the use of such systems elsewhere where the provision of visitor related assets requires an overview to ensure retention of quality and safety.

Programme 2: Stakeholder Engagement – Trade, Community, Local Authority & Tourism Bodies

The purpose for this programme is to produce actions that will drive **closer engagement between Ballyhoura Fáilte and the tourism trade**. This includes:

- **communication of the required minimum baseline** for each product which includes a vertical marketing cascade with each product provider connecting with the relevant trade marketing body e.g. B&B providers to connect with B&B Ireland, cycling providers with Cycling Ireland, walking route management with Irish Trails Office
- **newsletter for local community & trade**, which will drive community awareness of the work Ballyhoura Fáilte is carrying out on their behalf to strengthen the tourism sector in Ballyhoura communicating progress and achievements.
- representative Community Council including **Community Ambassadors** to liaise with Ballyhoura Fáilte and Ballyhoura Development to ensure a two-way communication process

- increasing communication, with **lobbying for a strategic policy committee** on county councils to coordinate tourism related development
- establishing a working relationship with **a key contact in Fáilte Ireland** to discuss key components of this action plan such as capital grant funding opportunities, training programmes, accreditation schemes, digital marketing training, business development and training for local guides, human resources, the proposed Kilmallock Medieval Experience, the proposed themed touring routes, particularly the proposed Ballyhoura Tourist Route, the proposed Steeplechase Festival, use of the Walkers Welcome branding, use of the Cyclists Welcome branding, promotion of the Ballyhoura Walking Festival, support for the attraction of European and World series of adventure races, moves to increase the registration of un-registered accommodation, visitor information point network, brand awareness, digital strategy for Ballyhoura, video content development, smartphone application development, the inclusion of Ballyhoura Country as a distinct destination within the East and South (Heritage & Culture) Destination Plan and the Munster Peaks Action Plan, collaborative marketing, and the preparation of an Experience Development Strategy
- **one-way baggage transfer service**, to enable bundling of accommodation and activities throughout the area for walkers and cyclists. This could consider options such as one-way bike drop off for cyclists. The initiative could be piloted in the area with greatest perceived demand.
- **Ballyhoura Open Door** initiative with free entry to attractions and activities for the local community on a specific day to raise awareness amongst the local community as to what the area offers visitors (targeting the large VFR market) with the aim of increasing opportunities for, and the likelihood of, cross-selling through heightened awareness of product offer.

Programme 4: Stakeholder Engagement – Training & Development

The aim of this programme is to **raise the quality of the tourism product offer** in Ballyhoura Country so that the **visitor experience & visitor satisfaction is enhanced** in line with expectations, **leading to repeat visits and referrals** through word of mouth and on-line recommendations e.g. via TripAdvisor. This includes:

Programme 3: Stakeholder Engagement – Collaboration and Linkages

The purpose of this programme to **increase collaboration and linkages** between businesses within and in areas adjacent to the Ballyhoura Country area. This includes:

- **B2B training & familiarisation days** for businesses within the Ballyhoura area to raise awareness amongst people working in the tourism industry of what other attractions and services are on offer in the area so they can make personal recommendations and exploit cross-selling opportunities.
- provision of **targeted training programmes and advice**, to raise the quality of the tourism product offer and to enable tourism related businesses within Ballyhoura to avail of relevant training on offer that would enable them to save money and increase revenue. Fáilte Ireland offers a wide range of training programmes that businesses are often not aware of & this measure will provide them with relevant information. The provision of digital marketing training, through an external service provider, for businesses within the Ballyhoura area will enable them to raise their online profile and encourage increased numbers of visitors. The provision of support for business creation and development will further develop the range and quality of tourism businesses

in Ballyhoura. The provision of training programmes for guides represents the continuation of the current strategy into this new plan. Familiarisation visits for tourism businesses in the Ballyhoura Country area to Burren & Cliffs of Moher will enable businesses from Ballyhoura to learn about their collaborative approach to business development – Burren Geopark management have indicated they are happy to establish a programme for this form of familiarisation visit.

- **encouraging tourism business to join environmental accreditation schemes** means businesses will reduce their costs and their negative impacts. Importantly this will, once a critical mass of businesses has become accredited, enable the destination to be marketed as a responsible tourism destination.
- the production of a comprehensive **human resources development strategy** for the hospitality and tourism sector in Ballyhoura will aim to ensure there are equal opportunities for access to employment, career development and capacity building. This must incorporate a structured, phased and fully integrated implementation programme.
- the production of a **Volunteer Plan** for coordination of community volunteers will offer a means for the local community to engage in the conservation and development of the natural cultural and built heritage of the county; and for Ballyhoura Fáilte to capitalise on the desire of many people to give time.

Programme 5: Product Development – Flagship Experiences

The purpose of this programme is to identify actions which over the period of this strategy will increase the volume of, and yield from, visitors to the three flagship visitor attractions of Doneraile Court & Gardens, Lough Gur and Ballyhoura Trailhead. In addition there are several proposed flagship attractions outlined below. The overall aim of

this programme is to provide a coordinated response to the identified need for several flagship attractions in the area and provide a basis for targeting funding.

Doneraile Court & Gardens

The goal is to secure Doneraile's position as a regional attraction and to enable it to attract 400-500,000 visitors p.a., providing local employment and economic spin-offs for the town of Doneraile. Actions include:

- **continued implementation of the current Masterplan** which will: open up further areas of the castle interior and gardens to the public; provide more commercial opportunities; enable larger volumes of visitors to come to the castle, for example coach groups; and provide improved signage and services for visitors.
- commissioning of a **feasibility study into the optimum commercial opportunities** for Doneraile Court & Gardens – investigating which would have the most revenue potential and have the best 'fit' with the environment of Doneraile Court. This includes festivals, events, bike hire and weddings.
- application for **World Heritage Site designation** reflects the recognised heritage potential of Doneraile Court.

Lough Gur

The goal is to build on the work already completed and to enable Lough Gur to attract more visitors and local revenue without impacting on those qualities which make it a special place. Actions include:

- a **Lough Gur Masterplan**, reflects the need to coordinate the development of the area over a multi-year timeframe. The topics listed under this action are some of the management priorities though many more issues are likely to be covered by an in-depth Masterplan. Measures include: identifying opportunities to fund increased staff and volunteer numbers through grant funding, sponsorship and fees, necessary

to implement plans currently in place and to operate the business including management of volunteers; a children's playground to cater for a growing family market and increase dwell time. A key focus of the Masterplan will be how to increase the revenue stream for Lough Gur Development Cooperative Society without negative impacts on the character of Lough Gur.

- the **implementation of the Lough Gur Masterplan**, which reflects the need to assign resources to implementation.
- the need for an active **Lough Gur Partnership**, which reflects the need for a multi agency approach to enable implementation of the Masterplan and the development of Lough Gur as an attraction of national importance. This will require 'buy-in' and support from the identified parties.
- continued engagement with the **research programme to determine water origin and water quality** and required measures to improve water quality. This will require measures within the Masterplan to improve water quality over the period of the plan e.g. reduction of algal bloom through investigation into best-practice methods used elsewhere. This will enable increased watersports and greater use of Lough Gur as an angling resource, attracting increased number of visitors and revenue.
- application for **World Heritage Site** designation reflects the recognised natural and heritage potential of Lough Gur.

Ballyhoura Trailhead

Proposals for Ballyhoura Trailhead aim to raise the profile of the facility and to cater for in excess of 100-150,000 visitors p.a. over the period of the plan by widening the appeal of the site to the family market. These include:

- need for a **Ballyhoura Trailhead Masterplan**, which reflects the need to coordinate the development of this increasingly popular attraction over a multi-year timeframe. This includes: the development of infrastructure to improve the visitor experience such as visitor facilities, parking, signage and playgrounds; the development of the trails network to ensure it is firmly established as one of the best trail networks in Europe; marketing and promotion measures to ensure the profile of the facility is raised and that the local community are more closely involved; conservation measures to enhance the local environment including education programmes for schools and other parties.
- implementation of the **Ballyhoura Trailhead Partnership**, which reflects the need to assign resources to implementation.
- the Ballyhoura Trailhead Partnership reflects the need for a **multi agency approach** to enable implementation of the Masterplan and the development of Ballyhoura Trailhead as an attraction of international importance. This will require 'buy-in' and support from the identified parties.
- the construction of a **Ballyhoura Trails Visitor Centre**, which reflects the need for an amenity with integrated education facility/ bike shop/ bike hire facility/ franchised cafe to facilitate forecast growth. This facility, which is it is envisaged would be operated by Ballyhoura Fáilte, would provide a source of revenue generation.

- the commissioning of a **feasibility study into a Tree Top Adventure Park** at Ballyhoura Trailhead aims to cater for the family market and position Ballyhoura Trailhead as a multi-activity centre.

Proposed Flagship Attractions

- the construction of a regional medieval heritage centre, **Kilmallock Medieval Experience**, relates to an active proposal to utilise the Stone Medieval Mansion on Sarsfield Street in Kilmallock which would be completed during the lifetime of this strategy. This centre would capitalise on the unique medieval heritage of the town – and upon the medieval heritage in towns in the region such as Buttevant, Cahir, Liscarroll, Clonmel, Carrick-on-Suir, Fethard and Cashel. The content could include: high quality interpretation regarding the history of Kilmallock and recreation of the lives of the people of the town; interpretation in relation to the connection between Kilmallock and other medieval towns such as Buttevant, Cahir, Liscarroll, Clonmel, Carrick-on-Suir and Cashel; a Discover Ireland Visitor Centre; a 50 seat cafe to encourage coach tour stop offs; coach and car parking; and bike hire. The construction of such an attraction would attract much needed visitors and revenue into Kilmallock and capitalise upon its Unique Selling Point.
- the construction and marketing of a **Ballyhoura Tourist Trail** is based on a route from Limerick-Lough Gur – Kilmallock – Ardpatrick – Doneraile – Mallow – Cork to include appropriate branded signage and promotional material, linking towns attractions and activities in Ballyhoura and provide a compelling reason to stop in the area. (See Map 7). This route, based on the unique built heritage of the Ballyhoura area and linking to tourism hubs in Cashel, Kilkenny, Carrick-on-Suir, Clonmel and Waterford, will link the Wild Atlantic Way in Limerick to the East & South destination. The primary aim will be to encourage day-trippers and holiday makers to take an alternative route through the area, increasing dwell time and visitors/revenue into the Ballyhoura area. Once the primary Ballyhoura Tourist Trail is established the network could be extended.
- the commissioning of a feasibility study into and the construction of a **Ballyhoura Greenway** reflects an opportunity to develop a greenway along the disused rail line between Limerick City and Kilmallock via Charleville offering people living in Limerick and visitors to Limerick City and the wider Wild Atlantic Way route a means to access the heart of Ballyhoura with ease.
- the **Ballyhoura Downhill Cycle Route** reflects a perceived opportunity to create a downhill mountain bike course in the Galtee Mountains, designed to the highest international standards capitalising on the proximity of the Ballyhoura Trailhead mountain bike trails.
- the commissioning of a feasibility study for a **Multi-purpose Indoor Event Centre** reflects the need for more opportunities to host indoor activities within the Ballyhoura Area both to provide a facility for the local community and to encourage visitors to stay for longer within the Ballyhoura area.
- the **Ballyhoura Steeplechase Festival** envisages an event based around original steeplechase. The origin of the steeplechase in Ballyhoura is a unique claim to fame and a flagship festival could be based around the original course from Doneraile to Buttevant. This could attract a significant number of domestic visitors with an interest in equestrian events as well as overseas visitors. The Steeplechase Festival could be one element of a multi-day cultural festival based in Doneraile & Buttevant, raising the profile of the area.

Map 7: Proposed Ballyhoura Tourist Route



- KEY**
- Railway
 - Railway Station
 - Study Area
 - Lough Gur Visitor Centre
 - Ballyhoura Trailhead
 - Doneraile Court & Gardens
 - Proposed Ballyhoura Tourist Route
 - Ballyhoura Tourist Route Access Corridors

Map 6: Proposed Long Distance Cycle Routes



Programme 6: Product Development - Recreation

The aims of this programme, targeted towards recreation opportunities, are to drive an increase in the volume of visitors using Ballyhoura Country's recreational resources; and to increase experiential satisfaction levels amongst these visitors. In this regard, and reflecting the quality of the existing resource, the proposed actions relate both to planned product and infrastructure development, as well as to enhancement and promotion of existing resources to improve access and enjoyment.

The proposed product developments are designed: to create a clearer identity for Ballyhoura, based on better knowledge among visitors of its boundaries; and increased time spent in Ballyhoura leading to extra spending in the area and greater economic contribution i.e. businesses, jobs, income.

The focus is on those sectors perceived to offer the greatest potential in increasing visitor numbers and revenue. This includes walking, cycling, angling, equestrian and adventure races.

Walking

- the production of a **Ballyhoura Walking Trails Map** reflects the need to provide visitors with clear information on the available trails within the Ballyhoura area. This will also help reinforce the perception of the boundary of the Ballyhoura area.
- the production of **standardised downloadable route maps** reflects the growing demand for high quality maps which can be linked to a GPS signal. While some maps, produced by the Irish Trails Office, are available on the Visit Ballyhoura website, these are not available for all walks and there is no standard approach to the provision of trail maps in the Ballyhoura area.
- the development of **multi-access walks** reflects the international growth in the provision of multi access trails facilitating the use of trails by the young, old, those with disabilities, parents with buggies etc. This will help to widen the appeal of the walking product offer in Ballyhoura.
- the promotion of the **Walkers Welcome branding**, particularly in the accommodation sector, aims to widen the appeal of the Ballyhoura Country as a destination for walkers.
- maximising the potential of the **Ballyhoura Walking Festival** will necessitate an upgrading of the festival proposition to increase its relevance and appeal. There are now many other walking festivals nationally and internationally and Ballyhoura Walking Festival has lost its position as a market leader.
- a feasibility study into the **extension of existing walking/cycling trails** within Ballyhoura to link with walking/cycling trails in neighbouring counties aims to capitalise on work that has been done to create walking and cycling trails in neighbouring counties and to consider options for extending walking & cycle trails into multi-county trails. This would offer visitors an array of walking/cycling trails and help retain visitors.

Cycling

- the production of an overall **map of recommended cycling trails** within the Ballyhoura Country boundary for use in print media and download reflects the need to provide visitors with clear information on the available trails within the Ballyhoura area.
- the provision of **increased bike racks** at visitor attractions within the Ballyhoura Country area aims to increase the perception of Ballyhoura as a welcoming place for cyclists and to reduce

opportunities for the theft of visitors' bikes.

- the promotion of the use of **Cyclists Welcome branding** in the accommodation sector within the Ballyhoura Country boundary aims to widen the appeal of Ballyhoura as a destination for cyclists.
- **maximising linkages between accommodation and activity providers** reflects a perceived lack of information on the available activities on many hotel and B&B websites in the Ballyhoura area. Accommodation providers could benefit from extended stays and activity providers from increased business.

Angling

- the **expansion and promotion of angling opportunities** within the Ballyhoura area reflects the existing opportunities on the Blackwater and Shannon Rivers as well as the potential for growth, subject to an improvement in water quality such as Lough Gur. In addition there are opportunities for angling at the rivers Awbeg, Funcheon, Aherlow, Maigue, Loobagh, Morning Star and Camogue. This measure envisages installation of new infrastructure and upgrading of existing angling related infrastructure in targeted areas. It is envisaged that an infrastructure development programme would be prepared in conjunction with Inland Fisheries Ireland regarding areas with the most potential for attracting significant numbers of anglers.

Equestrian

- the commissioning of an **overall map of Ballyhoura equestrian centres and trekking routes** aims to provide visitors with clear information as to the location of equestrian opportunities, and to increase visitor participation and revenue from this sector.

- the promotion of **multi-day horse treks and offer bundled packages** of transport, accommodation and hire of horses aims to connect visitors with equestrian opportunities and drive the growth of this sector.
- the **expansion of the Ballyhoura equestrian product** aims to capitalise on successful examples from other countries that are considered transferable to Ballyhoura

Canoe/kayak

- the commissioning of **route identification and mapping of Blue Way kayak trails** in Ballyhoura reflects a trend for the development of such trails elsewhere in the country and for a desire for increasingly wild and adventurous activities among visitors. Ideal locations could be the Blackwater River and Lough Gur. It would also be important to highlight those locations where kayaks & canoes can be hired.

Adventure Races

- the evolution of the **Beast of Ballyhoura Adventure Race** reflects the evident potential of this race which could be developed from the current 2 day event to a 3-4 day event. The aim would be to attract increasing numbers of participants and to increase the profile of the event, thus increasing visitor revenue to Ballyhoura.
- the attraction of the **European Adventure Race Final in 2015 and World Final in 2016** reflects the potential of this race to become an international event, attracting increasing numbers of visitors and revenue to Ballyhoura.

Programme 7: Product Development - Heritage

The aim of this programme targeted towards built, cultural and natural heritage is to increase the **variety and quality** of the product offer, to **increase awareness** of what can be seen and done in the area; to **improve accessibility** of the heritage offer; to **protect and conserve the heritage** of Ballyhoura; and to **enhance and promote** the heritage offer of Ballyhoura with the goal of enhancing visitor satisfaction and **increasing local economic return from heritage based tourism**.

Built Heritage

- **targeted development work to maximise the tourism potential of built heritage** represents a continuation of work undertaken under the current strategy through the lifetime of this strategy. The aims are to continually upgrade the heritage product offer; to use tourism as a vehicle for conservation; and to attract increased numbers of visitors with an interest in architectural heritage.
- increased **community engagement in built heritage development** will lead to the development of ideas for the reuse of derelict buildings with potential for redevelopment. The aim of this measure is to rejuvenate rundown urban areas and to bring life to communities so creating a more welcoming environment and encouraging visitors to stay in the area longer.

Cultural Heritage

- the inclusion of **cultural heritage detail on the overall visitor map** of the Ballyhoura Country area aims to engage visitors to Ballyhoura with the distinctive culture of the area, improving their experience.

- **maximising the tourism potential of the food sector in Ballyhoura** includes a range of actions designed to engage visitors and to drive revenue for this sector. This includes such measures as; launching a Made in Ballyhoura label, and a Ballyhoura Breakfast label, and Kilmallock Food Festival; working with food producers and accommodation providers to increase the amount of local produce used; and working with Bord Bia on co-promotion of the Origin Green food label.
- the creation of a **Ballyhoura Food Trail and a 'Made in Ballyhoura' arts & crafts trail** builds on the success of similar trails elsewhere, such as those operated by Trail Kilkenny. This initiative will require building the capacity of food, arts and craft producers to cater for visitors on site. This could also include the promotion of a cycling food trail option with bike hire and map provision in accommodation centres and visitor centres.
- the aim of the **Reaching Out Programme and Historic Graveyards project** is to capitalise on this high potential sector and to continue existing work in this area.
- support for **local initiatives to capitalise on national marketing drives associated with the 'decade of centenaries'** reflects the tourism potential of this period and should include investigation of how similar events have been celebrated worldwide and consider transferable innovative marketing methods.
- **maximising the tourism potential of rural pubs** includes promotion of night-time music/entertainment in pubs, linking rambling house sessions into a cohesive product offer to extend night time entertainment options. This requires: details to be available to visitors on opening times and dates; communicating minimum equipment requirements for licensed premises in terms of provision of food to encourage

increased quality food offer in rural pubs in Ballyhoura; and new initiatives to link rural pubs e.g. Good Ballyhoura Pub Food Guide.

Natural Heritage

- the **identification and promotion of wildlife walks** in Ballyhoura, seeks to provide additional outdoor activities for visitors, local residents and schools based on the varied natural flora & fauna of Ballyhoura.
- the provision of information regarding **Coillte Forest Recreation Sites** on the overall visitor map of the Ballyhoura Country area aims to provide visitors with information on an increased range of things to see and do in the area, thus providing an enhanced visitor experience.
- the **launch and promotion of a Ballyhoura Gardens Trail** aims to provide visitors with an increased range of things to see & do in the Ballyhoura area.

Programme 8: Product Development - Accommodation

The aims of this programme are to increase the **quality of the visitor accommodation product in Ballyhoura**; increase the number of businesses registered with Fáilte Ireland; enhance the spatial location of the accommodation product; develop bundled options with activity and transport providers; and to increase collaboration between the accommodation sector and activity providers, other accommodation providers, food and drink providers, and local attractions. The overall aim is to increase visitor satisfaction and generate increased revenue for accommodation providers. This includes:

- addressing the present situation of many unregistered accommodation businesses in Ballyhoura by **encouraging greater participation in national registration schemes**. This is an issue in many other

places and Fáilte Ireland may be able to provide some guidance in how these issues can be addressed.

- **encouraging new accommodation to locate where there are gaps** in order to increase clustering effect will entail Ballyhoura Development working with Limerick and Cork County Councils to advise on which areas would most suit new visitor accommodation to ensure product matches demand.
- the provision of information to activity providers and attractions regarding the 50-bed Ballyhoura Hostel in Kilfinnane to **facilitate packages and bundling options** aims to capitalise on the investment in developing this hostel and, to widen the range of visitor accommodation offer in Ballyhoura.

Programme 9: Visitor Experience: Access, Orientation & Signage

The aims of this programme are to improve access to, and awareness of, Ballyhoura as a destination; and increase visitor satisfaction thereby increasing length of stay and spending in Ballyhoura. Actions include:

- **upgrading visitor infrastructure**, including measures relating to signage, trailheads, visitor facilities at viewpoints and picnic site opportunities.
- the **improvement of visitor access opportunities**, through: the introduction of Mountaineering Ireland's Mountain Access Project in the Ballyhoura Country area; the commissioning of an accessibility audit to drive increased accessibility at visitor attractions; and commissioning a study to investigate the optimum sustainable means of transferring people between accommodation providers and hubs within the Ballyhoura Country area including mountain trailheads. The aim is to enable increased numbers of visitors to access the largest range of places in

Ballyhoura safely and without negative impacts on the local environment.

- the implementation of **the Slieve Felim Recreation Plan** will meet the goal of connecting the urban centre of Limerick with to the surrounding countryside and Ballyhoura as a destination.

Programme 10: Visitor Experience: Information & Education

The aim for this programme is to improve visitor experience and awareness through, the provision of high quality information and education programmes; improved ticketing options and information on family activities.

- the commissioning of an external service provider to design, print and distribute a **Ballyhoura Country visitor map** will provide visitors with information on things to see and do within the Ballyhoura area. It is envisaged that this map would be available in various forms print, digitised and interactive version for use online. Map detail will include: accommodation, activity providers, food, craft, art, walking cycling and equestrian trails, bike, horse and kayak hire, driving trails, visitor information centres, heritage centres and festivals & events.
- the **bundling of visitor tickets to multiple attractions** within Ballyhoura would encourage visitors to one attraction to visit another and would be offered by defined flagship attractions e.g. Lough Gur, Ballyhoura Trailhead, Doneraile Court (once it opens to the public), and Kilmallock Medieval Experience (once opened).
- providing visitors with information on **all-family combination experiences** will widen the appeal of Ballyhoura and tap into the trend towards multi-generational activity.

- the installation of Ballyhoura Country **branded information racks** for use in tourism related businesses is designed to increase the profile of tourism businesses in Ballyhoura and to reinforce the Ballyhoura brand. (Target 20-25 businesses for participation.)
- the inclusion of **Leave No Trace principles** on promotional material, apps & signage aims to reduce the environmental impact of visitors.
- the provision of **education programmes** in conjunction with key heritage attractions is a continuation of current strategy and focuses on Griston Bog (education centre developed), Doneraile Court (education centre awaiting approval), Lough Gur (education centre awaiting approval), Ballyhoura Trailhead (education centre yet to be constructed in the new visitor centre). The aim of this measure is to widen the appeal of Ballyhoura as a destination and to provide more things to see & do, and to increase visitor engagement.
- the expansion of the **visitor information point network**, envisages 20 locations around the circumference of the Ballyhoura area (consisting of brochure racks and familiarisation visits to key Ballyhoura attractions for front-line staff). The purpose of this action is to increase visitor awareness of Ballyhoura attractions and to encourage people to visit more places and engage in more activities in the area.



Programme 11: Marketing & Promotion – Brand Awareness & Narration

The aims of this programme are to build on the work that has been completed to date in the promotion of Ballyhoura as a destination; and to kick-start a new phase with targeted marketing to raise national and international awareness of the Ballyhoura brand thus driving increased visits. This includes:

- the commissioning of **focussed targeted outdoor advertising, radio and TV advertising in key target markets** including iconic experiences, aiming to raise the profile of Ballyhoura as a multi-faceted adventure & heritage destination.
- **targeting large Dublin based corporations** with bundled outdoor activity options aimed at the large, young, active workforces of businesses such as Google, Facebook, Twitter etc seeking weekend recreation opportunities. The goal is to drive up visitor numbers and word of mouth recommendation.
- the organisation of **familiarisation trips for recreation organisations and media** within Ballyhoura is an extension of existing strategy and seeks to raise the profile of Ballyhoura as a destination with increased trade awareness and well-placed articles.
- **increasing tourism product inventory on tour operator and online travel agent sites** again seeks to raise the profile of Ballyhoura as a destination and lead to increased visitation.
- attending **selected trade workshops, in market consumer events and trade shows** in Ireland based on identified target markets represents an extension of existing strategy and seeks to raise the profile of Ballyhoura as a destination.

- **fieldtrips for Ballyhoura trade to key destinations** such as Burren & Cliffs of Moher Geopark and Trail Kilkenny in order to learn from their experiences is viewed a two-way process that would benefit both destinations.

Programme 12: Marketing & Promotion – Digital Marketing & Social Media

The aim of this programme is to review the current focus of Ballyhoura in terms of the constantly changing and closely competitive area of digital marketing and social media in order to ensure the optimum approach is taken. This includes:

- the commissioning of a **digital strategy for Ballyhoura Country** through an external service provider represents a key section of work in relation to the future direction of Ballyhoura. This digital media strategy will include; a revamping of the Visit Ballyhoura website to include embedded video, downloadable visitor maps, trail route maps, itineraries, and the ability for visitors to book accommodation, activities and bundles; the ability to take online bookings and raise revenue through referral fees (thus contributing to the sustainable operation of Ballyhoura Fáilte); and social media content including the Facebook page, YouTube, Instagram and Twitter account. While discoverireland.com currently has information on some Ballyhoura based businesses it does not include all nor does it have detailed content on many. This contract should include optimising this content as well as producing a range of experiential bundled offers for visitors.
- the commissioning of **video content for Ballyhoura based adventure activities, food & craft businesses** reflects the growing use of video content by visitors in decision-making. High quality video content can be a key driver in increasing visitor numbers to a destination or attraction.

- commissioning a **smartphone application for Ballyhoura Country** reflects the increasing use of smartphones and tablets for visitors' decision making
- **merging customer databases** within the area will enable scaled online promotion which will benefit the whole destination as well as those businesses participating – driving business through co-opetition

Programme 13: Marketing & Promotion – Regional Marketing & Promotion

The aim of this programme is to focus on collaborative marketing methods and to ensure a strong profile for Ballyhoura as a visitor destination. Collaboration is both internal and external: the development of bundled packages focuses on operators in Ballyhoura working together; ensuring that Ballyhoura is a key element in the forthcoming East and South Destination Plan, and is central in the implementation of the recently-approved Munster Peaks (Great South Mountain Park) action plan requires strong working links with respectively Fáilte Ireland and the company charged with implementing the Munster Peaks plan; working with specialist marketing groups like Dream Ireland in respect of self catering will necessitate commitment from both the individual operators and Ballyhoura Fáilte with the outside agency. Actions include:

- lobbying relevant stakeholders (i.e. Fáilte Ireland) to ensure that the **Ballyhoura Country Tourism Strategy 2020 is an integral part of the East and South (Heritage & Culture) Destination Plan**.
- **collaborative group marketing opportunities** envisage Ballyhoura Fáilte joining with other similar destinations in the promotion of its activities and attractions e.g. marketing Ballyhoura mountain-biking with other mountain-biking venues on the island of Ireland; marketing Doneraile Court as a part of a national garden tour.

- the preparation of an **Experience Development Strategy** in conjunction with Fáilte Ireland toolkit in relation to Product : Service : Story : Narration reflects the need for a strategic approach in this regard. It is envisaged that Ballyhoura Fáilte would seek Fáilte Ireland input on this.
- close liaison with the company established to process the implementation of the Munster Peaks (Great Southern Mountain Park) in respect of **cross-marketing and international collaborative marketing** based on destinations of scale to attract market attention.
- Coordination with a **marketing group specialising in Ballyhoura's main accommodation sector i.e. self catering**. The arrangement would entail individual self-catering operators signing up with the agency – Dream Ireland – and Ballyhoura Fáilte financing the costs of a destination newsletter to a database of 100,000 households, a web newsletter and online promotional activities
- encouragement of all visitor information offices and heritage centres to offer visitors '**Great Days Out**' packages with detail of key experiences visitors can do in a day based on the success of similar initiatives elsewhere such as Lismore Heritage Centre.
- creation of a series of **hen & stag packages** with an emphasis on 'staycations' could include 1, 2, 3, 4 and 5 day packages to entice this lucrative market to Ballyhoura.
- the **coordination of the promotion of current festivals and events** within the Ballyhoura Country area reflects the need to ensure that the tourism potential of such festivals is maximised, and that festivals are timetabled in the most efficient way to attract visitors in the peak and shoulder seasons. It is envisaged that Fáilte Ireland input would be sought here.

- the introduction of an **attraction and activity discount card** for local residents is designed to capitalise on the VFR market, driving growth in word of mouth referrals.
- the commissioning of a **visitor monitoring plan** for the Ballyhoura Country area aims to ensure Ballyhoura Fáilte is aware of visitor volume and trends, and is able to use this information to inform decision making.

Programme 14: Monitoring & Evaluation

The aim of this programme is to review and improve Ballyhoura as a destination against agreed criteria and to ensure progress against the objectives of this plan. This includes:

- an **annual review of progress** against actions identified within this strategy to ensure the implementation of the strategy remains on target.
- the introduction of an **economic impact monitoring system** based on an accommodation sector review of bed-nights aims to increase the intelligence available to Ballyhoura Fáilte, ensuring that decision making is evidence based.
- participation in the **European Tourism Indicator System for the Sustainable Management of Destinations** (as have Burren and Cliffs of Moher Geopark) would enable benchmarking the destination against agreed criteria. This would also lead to a more sustainable destination and a foundation for marketing advantage.
- the installation of track counters on Ballyhoura Way and Kilmallock cycle routes aims to ensure Ballyhoura Fáilte is aware of visitor volume and trends, and is able to use this information to inform decision making.



1. The Need for a Plan

The Tourism Plan delineating “The Way Forward” for Ballyhoura Country is needed on four levels:

- To establish strategies and plans for new product/experience opportunities in order to establish the region as a premier tourism destination in Ireland,
- To identify and elaborate the communications methods and tools through which awareness of the tourism products/experiences of Ballyhoura Country can be increased, and interest and demand for visits to the area stimulated,
- To outline the ways in which cooperation and coordination can be created with administrations and the tourism private sector in areas surrounding Ballyhoura Country, and
- To identify mechanisms and actions to improve the integration of the tourism product/experience offering across Ballyhoura Country involving clustering and networking between providers and suppliers.

New product/experience opportunities

In order for Ballyhoura Country to realise its full potential, for the benefit of its tourism operators and the community at large, additional provision and presentation of key visitor attractions are needed. The successful development of products and experiences will then depend on effective management, coordination and promotion so that visitors are attracted to Ballyhoura Country, contribute substantially to the economy of the region, and return home with a high level of satisfaction with their time in the region.

Marketing Communications

Ballyhoura Country suffers from a low level of awareness of its tourism attractions, and facilities in overseas markets. This situation

arises from 1. The limited scale of marketing and promotional budgets resulting in an inadequate range of communications activities targeted primary segments, and 2. the relative remoteness of the Ballyhoura Country area, located at considerable distance from the primary gateways into Ireland. These two factors can be addressed through the extensive adoption of digital marketing methods to bring Ballyhoura Country to the attention of the increasing volumes of travellers using the internet to research possible travel destinations.

Linkages with neighbouring regions

While this is a Tourism Plan for Ballyhoura Country, it is not prepared in a vacuum since it cannot prosper as a tourism destination without links and cooperation with its neighbouring regions i.e. the other parts of the Munster Peaks (aka Great Southern Mountain Park) to its east, of which it is a part, the major tourist centres and gateways into the region of Cork to the south, Shannon to the north west and Limerick to the north.

Integration of Ballyhoura Country’s tourism providers and suppliers

Recognising that tourism is made up of many players with different styles and objectives, this Tourism Plan is important as a means of supporting local tourism business, for the benefit of the community while at the same time protecting Ballyhoura’s outstanding, tranquil natural environment, and the socio-cultural values of the communities of its small towns and villages. A vital means of achieving the optimal performance of the tourism sector will be through individual operators working together and supporting the development of clusters of tourism products/experiences and the marketing of these.

Map 2: Ballyhoura Country Study Area Overview



This plan:

- Sets out the vision for tourism which addresses the needs of the industry, the community and our visitors
- Provides a framework for, and a commitment to doing what is manageable in the pursuit of, the vision
- Increases the profile of tourism in Ballyhoura within Ireland, and ensures that key decision makers are aware of its importance and potential
- Ensures that resources for tourism are effectively marshalled
- Eradicates ad hoc policy and decision-making and informs the decision making of local tourism businesses and partner organisations
- Provides a mechanism for evaluating the effectiveness, efficiency and value for money of Ballyhoura Fáilte activity, in the areas of tourism and leisure management, development and promotion
- Outlines a series of development projects to be subject to planning and environmental assessment and the availability of funds.

Ballyhoura is a component region within the Munster Peaks study area for which a Concept Development and Feasibility Plan was prepared in April 2014 under the proposed designation of the Great Southern Mountain Park. As such, the approach has been to develop proposals that are consistent with, and achieve maximum benefit from, the strategies and actions in that Plan, while achieving a clear identity and positioning for the Ballyhoura region in its own right.

While there is some degree of repetition in the broader and Ballyhoura-specific plans, these occur only where there is maximum gain for Ballyhoura from pursuing such strategies and courses of action.



2. Situation Analysis

2.1 Area Profile, Market Performance & Trend Analysis

Tourism Potential

The key aspects of the recent past and present characteristics of, and trends in, overseas and domestic tourism to Ballyhoura are examined in this section. The analyses presented in the examination of the present situation is geared towards establishing a base and parameters to assess the future potential of overseas and domestic tourism and recreational use of the resources and attractions of Ballyhoura.

The tourism potential for Ballyhoura Country can be measured at a number of different levels.

1. At the broadest level Ballyhoura is looking to exploit the 3.5 million overseas visitors who come to Ireland in order to enjoy the sightseeing opportunities that the country offers while exploring its culture and heritage, the 100,000 holiday visitors from Northern Ireland and the more than 3 million domestic holiday trips taken by Irish residents.
2. At the inner level of potential the market is the holidaymakers who visit the South-West, Shannon and South-East regions.
3. This can be further refined to holidaymakers who visit counties Cork and Limerick, with additional potential in appropriate parts of Tipperary South.
4. Finally, the core potential for Ballyhoura are holidaymakers as above with a particular interest in activities, primarily hiking and hill walking, cycling and equestrian pursuits, and those who visit places of historical and cultural interest while in Ireland.

Throughout this section we will attempt to put numbers on these levels of potential, while bearing in mind that in many cases they will not be discreet values but are subject to varying levels of overlap, and we will explore the profile of the constituent markets and segments in order to better understand their motivations and needs. Existing data will allow us to examine the overseas visitors in greatest detail as there are greater limitations on the scope of the data in respect of both the domestic and Northern Ireland markets.

Profile of Overseas Visitors to the Ballyhoura Area

The following profile of overseas visitors to the Ballyhoura area is based on data from the **Fáilte Ireland Survey of Overseas Travellers**. The profile is based on overseas visitors who *spent at least one overnight* in the Ballyhoura area during the three years 2010 to 2012.

The key findings are as follows:

- Holiday visits account for 42% of all overseas visits to Ballyhoura, with North America the highest at 80%. Visiting friends and/or relatives account for 44% of all visits due to the strength of this cohort among British visitors to the area (75%).
- Two-thirds of holiday visitors were touring by car and using paid accommodation, 17% were defined as *activity specialists*. The most popular type of holiday mentioned by 70% of all holiday visitors was *the opportunity to explore Ireland's sights and to find out about the culture*.
- The average length of stay in Ireland for overseas visitors who stayed in Ballyhoura was 9 nights. Visitors from Mainland Europe stayed longest in the country at 14 nights, while North American visitors stayed for more than 8 nights and British visitors for almost 7 nights on average.

- A third of all visitor nights were spent in hotels, guesthouses and B & Bs, and more than a third were spent in the houses of friends and/or relatives. More than seven in ten North American nights were spent in hotels (47%) and B & Bs and guesthouses (25%) while seven in ten British visitor nights were spent in friends/relatives homes.
- Two-thirds of overseas holidaymaker nights were spent in paid, serviced accommodation, rising to 80% of North American holiday nights. Less formal types of accommodation such as caravan/camping and rented accommodation were popular with Mainland European Holiday visitors.
- Hiking/Cross-country walking was the most popular active pursuit, engaged in by 15% of visitors, one of four of whom said that the walking led to their choice of Ireland as their holiday destination.
- Visitors to Ballyhoura also visited Dublin, the Ring of Kerry, West Clare, Connemara and the Dingle Peninsula.
- More than one-third of overseas holiday visitors (half of North Americans) travelled to Ireland on package or inclusive arrangements, two-thirds were independent travellers.
- More than half had no ethnic links with Ireland and 60% were on their first visit to Ireland.
- The majority of overseas holiday visitors (70%) are either married or co-habiting and 77% have no dependent children. Two-thirds travelled either as couples or families and 43% were aged between 35 and 54 years. Almost a third were aged 55 years and over. Eight in ten were either AB or C1 social class, that is managerial/professional or white collar workers.
- The average spend of overseas visitors who stayed at least a night in Ballyhoura was €641, equivalent to €69 a day, with 60% spent on bed and board and other food and drink, 16% on tourist shopping and 14% on transport in Ireland.
- Four in ten overseas visitors considered the value for money in Ireland to be very good or good, however critically three in ten regarded value as poor or very poor.

Domestic Tourism Performance

The domestic tourism market in Ireland has declined in recent years as the impact of the recession has taken its toll on consumer confidence, with only a modest 2% recovery in domestic holidaytaking in 2013. Key characteristics of relevance for Ballyhoura are:

- The South-West region remains the most popular destination for domestic holidays
- Hotels account for 39% of all domestic holiday nights reflecting the preference for short breaks and the special offers available to Irish consumers.
- Hiking and walking is a popular activity among domestic holiday takers with 22% engaging.
- Ballyhoura has the activities and the attractions to attract the domestic holiday taker; however the limited hotel accommodation in the area can result in many taking a day trip rather than staying in the area.
- Despite the low take-up of guesthouses and B & Bs among domestic holidays generally, the less formal types of accommodation are popular with walkers so this segment remain a key potential for Ballyhoura.

Holiday Visitor Attitudes to Rural Ireland

Fáilte Ireland's survey of *Visitor Attitudes to Destinations* covers both overseas and domestic holiday visitors, and is based on feedback from those staying in the following destinations in 2012 - Shannon Corridor, West Cork, West Clare and Dingle Peninsula. These destinations were chosen as they are primarily rural in nature with physical characteristics similar to Ballyhoura. Key findings and conclusions of relevance to Ballyhoura are:

- The primary motivations for visiting mainly rural destinations in Ireland are to experience the beautiful scenery and the local history and culture.
- The majority of visitors seek information on the destination to help in planning their visit. Word of mouth is the most frequent source of information, closely followed by guide books and the internet.
- Information sought is on attractions and sights in the area and general things to see and do. Practical information is also sought on accommodation, tours and activities, maps and directions and eating options.
- Tourist Information Offices are the main source of local information when the visitor is in the destination.
- The friendliness of local people is the aspect of the destination most highly rated by visitors, followed by the natural environment and landscape, the cleanliness of the locality, the quality of the buildings and architecture and the availability of things to see and do locally.
- Visitors are most critical of the condition of roads, signposting and directions and value for money.

- Visitors are very likely to recommend a holiday in the area due to the beautiful scenery, the friendly people, the attractions available, the relaxed atmosphere, the history and the culture, and the many things to see and do locally.
- Where visitors have reservations about the area the main issues are the perception that it is expensive and the weather.

Key Market Segments for Ballyhoura

The key segments for Ireland in each of the main overseas markets, Britain, France, Germany and the United States, are identified as:

Primary:

Sightseers and Culture Seekers, tourists for whom exploring the country's sights and finding out about its culture is the key motivator for coming here on holiday. Research indicates that more than 20 million people meet this criterion in the four markets referred to above. They are characterised by a sense of exploration, a willingness to engage and a desire for authentic new experiences. They are also looking for distinctive local experiences and cultures and the opportunity to escape from their everyday lives.

Secondary:

Scenic Relaxers, that is those for whom relaxing and getting away from it all is the motivator for going on holiday. Participants tend to be slightly younger than the Sightseers and Culture Seekers, with more emphasis on easy and stress free experiences and spending quality time with family or a partner. Value for money and safety and security are also key to this group.

Redefining the Overseas Holiday Segments

The key overseas holiday segments were refined by the national tourism agencies in 2013 and the three most salient segments for Ballyhoura, particularly in respect of the British, French and German markets, are now identified as the **Culturally Curious**, **Great Escapers** and **Social Energisers**. In practice these three segments fit largely within the original segment of **Sightseers and Culture Seekers**, representing sub-segments within that broader segment, though encompassing younger age groups as well. The characteristics of the three sub-segments are:-

➤ **Culturally Curious**

- Tend to be middle aged (35 – 54);
- Likely to travel as a couple or with other adult friends;
- Want to broaden their minds and expand their experiences through landscape, history and culture;
- Curious and keen to learn about the places that they travel to;
- Independent active sightseers;
- Want to encounter new places and out-of-the-ordinary experiences.

➤ **Great Escapers**

- Tend to be younger (25 – 45);
- Often couples, some with young children, or travelling with friends and older family members;
- Need time out from busy lives and careers;
- Specially interested in rural holidays.

➤ **Social Energisers**

- The youngest target segment, primarily aged under 35;
- Like to holiday in groups or as couples;
- Look for places that are new, different, and vibrant.

Each of these segments is important to those marketing Ballyhoura Country as the holiday needs of visitors in these segments are:

- Authenticity,
- Exploration and discovery,
- Connecting with nature,
- Getting off the beaten track,
- Connecting with people,
- Beautiful landscapes,
- Engaging in active pursuits,
- Fun and enjoyment, and
- Lots to do in a small area – they want to pack everything in.

For the domestic market, Fáilte Ireland's most recent research identifies three segments as comprising over half of potential domestic holiday demand. One of these has significance for the Ballyhoura area i.e. **Footloose Socialisers**. This segment is characterised as:

- Taking short breaks,
- Liking to get away with their friends on short breaks as much as they can,
- Value conscious,
- Independent travellers,
- Attend cultural or sporting events,
- Engage in pursuits such as hillwalking

Research Conclusions

The image of Ireland among potential visitors is of a country with beautiful scenery, friendly people, primarily rural and offering rest and relaxation. It is also a country with a unique culture and history, reflected in the people, the towns and villages, and in music and story-telling. It also provides an excellent environment for active pursuits such as hill walking, cycling and equestrian pursuits.

Ballyhoura represents a microcosm of this general offering in that it is typical, though not particularly distinctive. While nestling within counties Cork and Limerick, it lacks recognition of other regional offerings such as West Cork, the Blackwater Valley, Bunratty, the Shannon River, or other destinations such as the Ring of Kerry, Dingle Peninsula or West Clare.

While the overall popularity of the South-West, Shannon and the South-East regions among both overseas and domestic holidaymakers offer a substantial potential for Ballyhoura to tap into, the lack of recognition or identification with the area means that it must work hard to achieve a share of the region's tourism. Ballyhoura is also inhibited by the limited accommodation stock available within the area. The real economic benefit from tourism is derived from bednights and not day trips.

Benchmark Estimates for Ballyhoura Tourism

The most recent study on the Ballyhoura area conducted by Limerick Institute of Technology suggests that the area attracted more than half a million visitors in 2012, resulting in a total spend in the area of €42 million. More than half of the total visits were day trips while staying visitors accounted for 262,000, of whom 184,000 stayed in paid accommodation and 78,000 stayed with friends or relatives (*this figure includes both overseas and domestic visitors but no breakdown is available*). Of the 184,000 visitors who stayed in paid accommodation, it is estimated that 97,500 were overseas visitors and 86,600 were domestic.



Tourism	Overseas	Domestic	VFR	Day Trips	Total Trips
Numbers	97,500	86,600	78,400	282,200	544,700
Average daily spend (€)	170	114	56	39	77
Expenditure (€m)	16.6	9.9	4.4	11.1	42.0

Note: the study calculated total expenditure by applying average per diem expenditure to the numbers in each category, without consideration of length of stay

Source: Assessing the Economic Contribution of Tourism to the Ballyhoura area, Limerick Institute of Technology, MA Research Thesis

TDI examination of Fáilte Ireland data shows the number of overseas tourists spending at least an overnight in counties Cork or Limerick, excluding VFR, is of the order of 1.09 million. Based on the LIT estimate for Ballyhoura of 97,500, this would suggest that Ballyhoura accounts for 9% of overseas visitors to the two counties. Given the number of visitors staying in Cork and Limerick cities, and the accommodation base in West Cork, this seems like a rather high estimate which would suggest that the above estimates for Ballyhoura are at the upper end of the range. This needs to be taken into account when setting forecasts for Ballyhoura to 2020.



A TDI analysis based on the inventory of paid accommodation in the Ballyhoura area, and excluding neighbouring locations such as Limerick city, Mallow and Castletroy, suggests 94 accommodation premises. Having made assumptions in respect of average beds available, seasonal opening, and occupancy rates for the South West based on Fáilte Ireland's accommodation survey, the following model has been developed for accommodation usage in the Ballyhoura area.

Accommodation Types	Number of Premises	Annual Beds Estimate	Average Occupancy (%)	Bednights Sold
Hotels	5	144,000	47	68,300
Guesthouses	1	1,800	41	740
B & Bs	28	84,000	24	20,160
Farmhouses	5	9,000	41	3,690
Self-catering	49	396,900	40	158,760
Holiday cottages	2	4,320	40	1,730
Youth Hostels	2	48,000	38	18,240
Caravan/ Camping	2	162,000	29	46,980
Total	94	866,220		318,600

Source: TDI

The assumptions employed in the above model, such as average beds per accommodation and seasonal opening times, are open to discussion, but based on the above, the estimated number of bednights sold in the Ballyhoura area would be 318,600. If we assume an average length of stay in Ballyhoura of between 1.5 and 3 nights, again subject to discussion and further analysis, the number of staying visitors in paid accommodation would be between 106,200 and 212,400.

If the above model is used in conjunction with the LIT study, it is apparent that the LIT figure of 184,000 staying visitors falls close to the mid-point of the range, though, as noted, this figure from the Accommodation Survey undertaken by Ballyhoura Fáilte must include visitors/guests staying more than a single night.

As shown in the top table in this sub-section, in converting overnight visitor, VFR and day tripper numbers to Ballyhoura into expenditure estimates, LIT use average daily expenditure without adjusting these for average length of stay. While the per diem spending figures for day trippers are valid, the average length of stay in the region by overnight visitors in paid accommodation and VFR visitors will be one or more nights.

TDI has prepared its own estimates of visitor spending in the Ballyhoura region amounting to just under €45 million in 2012 on the following basis:

Overseas overnights: 53% of overnight visitors found in the LIT survey to be from overseas (i.e. 106,200 at an average of 3 nights stay, or 212,400 average 1.5 nights stay) times average daily spending €69 (based on Fáilte Ireland survey data) times i.e. $0.53 \text{ share} \times 106,200 \text{ overnight visitors in paid accommodation} \times 3 \text{ days stay} \times €69 \text{ average daily spend} = €11.65 \text{ million}$ (NB same result emerges if taking higher volume of visitors for shorter length of stay).

The Fáilte Ireland average daily spending figure relates to alloverseas visitors to Ballyhoura including VFR and as such is too low for overseas visitors in paid accommodation. Estimating a figure between the €69 from the Fáilte Ireland analysis for all overseas visitors and the LIT figure of €170 is necessary but without primary research it is not possible to derive such a figure with certainty. For the purposes of this plan an average daily spending figure for overseas visitors to Ballyhoura in paid accommodation of between €80 and €100 has been estimated. Application of daily spending at the mid point of this range - €90 - would increase the base value of overseas visitors spending to €15.2 million.

Domestic overnights: 47% of overnight visitors found in the LIT survey to be domestic times average daily spending across both holiday and VFR visits and across both long and short holidays €50 (estimated from Fáilte Ireland survey data) i.e. $0.47 \text{ share} \times 106,200 \text{ overnight visitors in paid accommodation} \times 3 \text{ days stay} \times €50 \text{ average daily spend} = €7.5 \text{ million}$.

VFR: the 78,400 VFR visitors (i.e. domestic and overseas) from the LIT study times 2.5 days average VFR trip duration (from CSO data) times LIT study average daily spend of €56 = €11.0 million

Day trippers: LIT survey data of 282,200 times average spend of €39 = €11.1 million
AGGREGATE VISITOR SPENDING BASE 2012 OF €44.8 MILLION (i.e. €15.2 + €7.5 + €11.1 + €11.0 million)

NB These calculations are based on a number of assumed conditions such as the applicability of domestic tourism data to Ballyhoura and the validity of some of the LIT survey findings and should be treated with due caution. However, they represent a base on which to develop forecasts of future growth both in tourist activity and economic impact

2.2 Product Audit Summary & Issues Arising

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

- **Desk Based Research:** including collation of data from Fáilte Ireland's Tourism Content System, databases supplied by Ballyhoura Fáilte, county tourism websites, county development plans and web searches
- In depth **site visits**
- Targeted **consultation**

A database was utilised to store and analyse 560 tourism and recreation product data entries under the headings of:

- **Attractions**
- **Activities**
- **Accommodation**
- **Food & Drink**
- **Festivals & Events**

Map 3: Principal Transport Corridors and Driving Routes



2.2.1 Key Hub Identification

Visitor hubs in the area are divided into Primary Destination Gateways and Secondary Destination Gateways (see Appendix A2.2.). The justification for the selection of the **Primary Destination Gateways** is as follows:

- **Mitchelstown:** strategic location in close proximity to the Ballyhouras, Galtees and Knockmealdowns; Bus Eireann connection to Cork, Limerick, Dublin, Waterford and Kilkenny; and on the route of the M8 motorway, 6th highest accommodation range (see Appendix A2.9.1.).
- **Charleville:** location on the N20 Limerick-Cork road, rail connection to Dublin, Limerick and Cork; location on Bus Eireann route 51 from Cork to Galway via Limerick and the Charleville Park Hotel.



The large urban centre of Limerick City could also be regarded as a **Primary Destination Gateway** given its relatively large population base, wide range of visitor attractions, accommodation and facilities; close proximity to the boundary of the Ballyhoura Country study area; rail connection to Dublin and Cork, location on the Wild Atlantic Way, Bus Eireann connection to Cork, Dublin; and on the route of the M8 motorway.

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

- Kilmallock – heritage town with wide range of medieval heritage, selection of accommodation including hotel, proximity to Ballyhoura Forest mountain bike trails
- Kilfinane – picturesque town with range of adventure activities, proximity to Ballyhoura Forest mountain bike trails
- Doneraile – attractive town with potential of Doneraile Court as a significant visitor attraction

Gateways to the Ballyhoura Country Study Area

Tier 1: Large Urban Areas	Tier 2: Towns & Attractions outside study area	Tier 3: Primary Destination Gateways	Tier 4: Secondary Destination Gateways
Cork (190,196)	Cashel (Rock of Cashel)	Mitchelstown	Kilmallock
Limerick (91,303) ¹	Blarney (Blarney Castle)	Charleville	Kilfinane
	Mallow		Doneraile
	Fermoy		
	Tipperary Town		
	Clonmel		
	Cahir		



¹CSO Census 2011

2.2.2 Access & Signage

The Ballyhoura Country area is well-served by both rail and bus services with connections from Dublin, Cork and Limerick passing through the area (for detail on bus and rail services see Appendix A2.2.). Several busy roads run through Ballyhoura including the M8 from Dublin to Cork which passes through the south-west corner; the N20 which runs from Limerick to Cork via Charleville, Buttevant and Mallow; and the N24 from Limerick to Waterford via Tipperary.

This road network offers an advantage for the destination in that many people pass through the area; and conversely a disadvantage in that many people are travelling towards another destination e.g. Cork, Limerick, Dublin or Waterford or the smaller towns in between. The solution is to 'hook' people (international and domestic visitors and residents) off these transport corridors and the key to this is likely to be effective and well placed signage; in combination with marketing and promotion to raise awareness of the product offer.

TDI are aware of the Ballyhoura Signage Strategy which is underway. It will be important for the signage strategy to consider the following signage issues:

- How to direct visitors towards Ballyhoura – Getting to Ballyhoura
- How to tell visitors they have arrived at Ballyhoura – Creating a Sense of Arrival
- Letting visitors know what they can see in Ballyhoura – Highlighting Key Attractions
- Directing visitors where to go in Ballyhoura – Getting Around Ballyhoura

Getting to Ballyhoura

Approach roads to the area such as the motorways (M7, M8), National roads (N24, N20, N73, N74) and Regional roads (R526, R518, R515, R578, R505, R639, R665, R614, R619) should have signage indicating Ballyhoura Country so that visitors are aware of the destination. The signs should continue

at each junction until one of the peripheral Ballyhoura towns or villages is reached.

Creating a Sense of Arrival

It will be important that any such strategy reviews the current branding signage for the destination. All entry National and Regional entry roads around the circumference of the destination should have a 'Welcome to Ballyhoura Country' sign that is consistent and highlights the destination boundary. A welcome sign should then be placed at the entry point to each of the towns and villages in Ballyhoura.

Highlighting Key Attractions

When visitors are on significant transport corridors within the destination, such as the N24, N20 and M8, there needs to be consistent motivational signage with images of attractions, subject to NRA approval, to highlight the location of key attractions such as Lough Gur, Medieval Kilmallock, Ballyhoura Mountain Biking and Doneraile Court & Gardens.

Getting Around Ballyhoura

Within Ballyhoura Country the signage strategy should include:

- Orientation signage (map information boards) located at key access points
- Directional signage with directional fingerpost signage
- Interpretative signage i.e. panels in appropriate places

All new signs should comply with the standards required of tourism signage in the National Traffic Signs Manual (2010).



2.2.3 Visitor Attractions

The Ballyhoura Country study area, excluding Limerick City, contains three significant flagship visitor attractions, Lough Gur Heritage Centre, Ballyhoura Trailhead, and Doneraile Court & Gardens.

Lough Gur Heritage Centre

The centre recently underwent a significant refurbishment and re-opened in June 2013, receiving the Trip Advisor Certificate of Excellence Award in that year. Visitors to the Heritage Centre at Lough Gur can find out about the rich heritage of Lough Gur by visiting the interactive multimedia exhibition that brings to life over 6,000 of archaeology and history. Highlights include the state of the art exhibition, listening points, audio guides, archaeological dig, Neolithic Pot model, AV presentation and interactive touch-screens. The environs of the centre has an attractive waterfront and a short walk with expansive views over the lake, Bouchier Castle and the surrounding countryside.

Current marketing activities include:

- Visits to all primary and national schools in the Limerick City and County Areas to offer discounted packages and to gather feedback from teachers about their requirements, with a particular focus on transition year students.
- New events set up to promote Lough Gur including an Easter Egg Hunt and folklore tour (both very successful) and now planning a nature/wildlife day.
- Information set to all PROBUS members - the retired professional's organisation.
- Information sent out to all historical societies in Ireland
- Building links and relationships with organisations such as the Hunt Museum to include group ticket pricing for schools.
- Successful application for visitor information point status.
- Successful application to become a Discover Primary Maths and Science Centre
- In person meeting with over 40 national and international tour operators.
- Climbed from the No11 to the No3 position on Trip Advisor.
- A least 5 fam trips from International travel writer groups via the Limerick City of Culture marketing initiatives.
- Linked into the Limerick City of Culture marketing programmes for 2014.
- In person meeting with the Director of the Limerick Education Resource Centre who are responsible for providing primary and secondary schools with resources on history and archaeology. They have agreed to include Lough Gur in the information that they send to all schools and are developing a new programme that will include Lough Gur.
- In person meetings with local businesses including Ballyneety Golf Club to offer discounts to their members which will be circulated to all of their members and families.
- Developing packages with local hotels and restaurants.

- Working with University College Cork and Limerick along with other third level institutes to build on the information that we have to offer e.g. Irish Quaternary Association holding their annual conference in Lough Gur this year.
- Connecting, developing, networking with local groups in Limerick.
- Improving digital marketing strategies.
- Incorporation of geography, geology and astronomy as part of the Lough Gur tours including a focus on the Stone Circle at Grange
- Positioning as a Discovery Centre for primary schools
- Positioning as a Visitor Information Centre
- Offer comprehensive packages in conjunction with other local businesses & work with associated activity/heritages to encourage increased visitation and to broaden appeal

Development Priorities for Lough Gur:²

Lough Gur clearly has significant development potential and there are several development priorities that have been identified by the management of the site. The most important of these are considered to be:

- Increased resources to be able to pay for staff to implement plans currently in place and to operate the business including management of volunteers
- Increased financial resources for marketing
- Development of recreational infrastructure, particularly a children's playground and loop walks
- Development of the lake as an angling and water-sports centre including pontoons, slipway, angling stands and associated infrastructure

Other priorities that were indicated for Lough Gur include:

- Enhanced restaurant facilities to facilitate coach tours
- Interpretative panels for natural heritage
- Development of a folklore tour

- On-site animators to dress as characters from mediaeval to modern times
- Excavation pit
- Bird hide

Ballyhoura Trailhead

The Ballyhoura Trailhead consists of the Coillte owned car-park, the Trailriders bike hire facility and shop, and the Coillte picnic venue and toilets/showers. The Ballyhoura Bike Trails (for more detail on the trails see Appendix A2.5.2.) are currently undergoing a radical renovation which will see the overall track length increased by 50% as well as more family facilities.

The venue hosted the 10 day European Marathon Championships in June 2014, expected to deliver close to 8,000 bed nights to the region and contribute €1 million to the local economy. Overall the current economic value to the Ballyhoura region from the trail facility is close to €3 million and the forecast increase in visitors has the potential to grow this to €5 million with visitor numbers forecast to grow from the current 62,000 p.a. to over 100,000 by 2018.

² Information supplied by Kate Harrold, Manager, Lough Gur Development Association, 23rd June 2014

Development priorities for Ballyhoura Trailhead³ include:

- Developing a visitor centre amenity similar to those available in Wales at mountain-biking venues including bike hire and sales
- A cafe for visitors
- An education centre
- Visitor information for the area
- Improved directional road signage from the larger towns on the area such as Mitchelstown, Mallow, Kilfinane and Kilmallock
- Children's playground to cater for family market.
- Multi-access loop walk from the visitor centre car-park to cater for family market (buggy accessible) and elderly and wheelchairs
- Annual hosting of a significant championship event
- Adventure activities

Doneraile Court & Gardens

Doneraile has been the focus of a significant development programme and attracts in excess of 100,000 visitors each year, with the capability to attract far more if upgraded facilities are provided such as an interpretative centre. The location of Doneraile Court, in close proximity to the M8 and with accommodation hubs nearby at Mallow and Charleville, mean that this site has significant potential for local economic benefit.

A review of over 170 National Trust properties in the UK has revealed that none offer the visitor a large and significant seventeenth century formal garden, a large eighteenth century parkland setting, and extensive

eighteenth/nineteenth century walled gardens, in such a state of almost complete presentation at one visitor site.

In terms of a heritage offering, therefore, it is proposed to market the site in terms of its unique and significant garden evolution. It should be noted that academic presentations have been made at the Universities of Cork, Limerick, and Belfast, as well as at the National Gallery of Ireland, on the historical importance of this suite of gardens. There is a general view among conservators, academic and practitioners that this site is of significant international conservation importance.

Over the last few years there has been significant activity at Doneraile to both raise its profile as a destination and to provide a wider range of facilities. This includes:

- Children's adventure playground
- Roadways, pathways, ancillary car parking, upgrading of toilets, and the provision of a security system
- Tearooms
- Restoration of the Triumphal Arch
- Studies on the historical evolution of the gardens at the Park (since 1627) and the technical aspects of the gardens such as topography, geophysics, and structural stability of upstanding features
- Voluntary tour guide group – eight guides have currently been trained with four joining later in 2014
- Voluntary primary science development group with Primary Science Tours starting September 2014
- Development of a dedicated website www.doneraile.ie
- Employment has increased from 4 to 15 over the 2011-2014 period

³ Information supplied by Liam Sheehy, Trailriders, 25th June 2014 and based on discussions with tourism trade

Current projects include:

- Development of the ground floor of the Court (opening spring 2015)
- Archaeological dig located on the site of Doneraile Castle
- Pilot wall restoration project in the seventeenth century garden

Development priorities for Doneraile Court & Gardens over the next few years include:⁴

- Continued implementation of the proposals contained in the Masterplan Review of Development Proposals for Doneraile Court by Doneraile Court & Demesne Agency Steering Group (ASG)
- Opening of seventeenth, eighteenth, and nineteenth century garden spaces to the public
- The development of a restaurant in the coach house
- Public (or institutional) use of the first and second floors of Doneraile Court
- Commercial development of the adjacent farmyard space to the south of the Court
- Increased local employment
- Increased connectivity with and spin-offs for the town of Doneraile

Each of these offers further development opportunities with the opportunity increase associated benefits to the local community. Doneraile Court & Gardens likely offers the greatest potential of the three due to its heritage value, recreational amenities and location.

⁴ Information supplied by Michael O'Sullivan, Doneraile Development Association in conversation and by email

2.2.4 Adventure Product

Walking

- There are a very wide range of walks to suit all levels of walkers from beginners to hardened long distance hikers as well as those interested in the historic heritage on historic town walks within the study area. There are many walking clubs and festivals – testament to both the local demand for walking and to the interest in the area from the domestic and international markets.
- However there are currently no **walking maps** available which link these walks and which provide visitors to the area with a resource with which to plan their activity. There is an opportunity to provide detailed information on the walk in the study area, to provide a dedicated website with downloadable maps and for integrated promotion of the walking product.
- In terms of **visitor infrastructure** many trailheads require upgraded car-parking, litter management and toilet facilities to bring the product offer in line with other destinations within Ireland and other countries.
- There is currently no data for walkers using the various long distance and shorter routes. Installation of **track counters** at selected locations would enable monitoring over time leading to better decision making.
- Increased linkage is required between the product available and the product providers such as accommodation and facilities/services in the towns and villages in the study area. Increased consideration of the timing of services and use of the Walkers Welcome approach could lead to increased visits by walkers. There are also opportunities or guiding services in the study area – interpreting the natural, cultural and archaeological, and geological features of the area for walkers.

- The challenge is to **package & promote** the walking product and to capitalise on the popularity of **walking festivals** to encourage greater numbers of walkers into the area. This needs to be combined with **measures to offer better services** in towns & villages and **walker-friendly accommodation**.
- The focus for the walking product is **both on the hard adventurers – those that are likely to arrive on day visits from the domestic market or walking holidays from the international markets but from whom the economic return might not be that significant; and on the Sightseers & Culture Seekers segment - who are more likely to engage in shorter walks as an additional activity to visiting heritage attractions, and from whom the economic return is likely to be greater. However the provision of facilities for the former is likely to make the area more attractive for the latter due to the existence value of recreational opportunities.**
- A boost to the Ballyhoura Walking Festival, an event that defines the activity in the area, is needed. Further broadening in the variation of walks is needed, incorporating walks in different parts of Ballyhoura, and featuring walks of varying levels of difficulty, and based on different interests and themes in order to attract as broad a cross section of walkers as possible. Organisation, marketing and execution should be based on the Isle of Wight Walking Festival model with extensive sponsorship sought, facilities provided and competitions organised.

Map 5: Existing Long Distance Walking Route



Cycling

- Similar comments can be made regarding the cycling product as with walking. When the study area is considered as a whole there is a considerable cycling product in terms of attractions (Ballyhoura), routes and tours. There are also many cycling clubs in the area indicating both the strength of the product offer and the local demand.
- **There is an opportunity to provide better information on cycling in the area through use of maps, downloadable cycle routes and better on-road signage. This, combined with the provision of better cycling facilities for visitors, through implementation of a Cyclists Welcome type approach and better infrastructure such as bike parking in towns and villages, could encourage greater use of cycling routes in the area.**
- The Ballyhoura cycle trails offer a premier adventure tourism product in the area yet very few of the accommodation providers offer visitors information on the trails either on their websites or in their establishments. This is surprising given that it could entice visitors to stay another day with associated revenue benefits and is an **opportunity for accommodation product providers.**
- The same comment regarding product:market matching made for walking also applies to cycling.

Map 4: Existing Long Distance Cycle Trail Network



Angling

- As with walking and cycling there is a diverse range of high quality angling product in the study area of interest to many domestic and international anglers. The challenge again is to **promote this product and to link it with other products** in the area such as other forms of recreation and accommodation.
- There is a further opportunity for a promotional area body to work with Inland Fisheries Ireland (FI) and local angling clubs to **promote and manage the area** in the most effective way possible to encourage greater numbers of anglers to come to the study area. This includes making day licences easier to obtain and enabling **better access** to rivers and lakes.

Orienteering/Hill-running

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

Equestrian

- There are a range of equestrian options within the study area and, as with other adventure tourism products, the challenge is to make visitors **aware of this product offer** - creating the link between the visitor and the product

through better promotion and opportunities to take part.

- Opportunities exist to map existing and **develop new riding routes**, with a major trail of significant length featuring terrains of a variety of difficulties established as Ballyhoura's flagship equestrian attraction. This could be marketed under a similar brand as the 'Horses Welcome' scheme operated by the British Horse Society (BHS).
- Boosting equestrian tourism can be achieved through: increasing the linkages between the product and the market through the increased use of bundling with accommodation in the area; and by collaboratively with equestrian interests and tourism marketing agencies in adjacent areas, and nationally.

Bird-watching

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

Golf

- As with other forms of adventure tourism in the study area there is a range of quality golf related product that could be used for a marketing advantage if promoted as part of an **integrated activity product** in the area.
- Opportunity to develop a Ballyhoura Gold Tour Pass.

Multi-Activity Centres

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

and help retain visitors in the area for longer.

2.2.5 Built Heritage

- The study area contains some of the finest mediaeval built heritage in the country including the many structures in Kilmallock such as the Town Gate, town centre buildings and the religious heritage, Doneraile Court and Kilbolane Castle near Charleville.
- Many of these have great potential yet are **currently underdeveloped**, such as Doneraile Court and the many buildings in Kilmallock, and their tourism potential could be enhanced through targeted development. The majority of these buildings are under the control of the OPW which has now been tasked with maximising the tourism potential of the structures it manages.
- **In addition to maximising asset potential the opportunity here lies in integration with the adventure product and raising awareness amongst visitors about what the area has to offer.**



2.2.6 Cultural Heritage

- There are many local food, craft and art producers who could be linked and promoted through use of a trail concept. **However one of the issues with the establishment of similar food & craft trails elsewhere is the degree to which producers are set up to cater for visitors on site. This needs to be investigated prior to the establishment of a trail.**
- **Increasing the linkage between food producers and accommodation could also be an opportunity so that accommodation producers stock and use local food and celebrate that in their marketing and menus – providing visitors with a distinctive local experience.**

2.2.7 Natural Heritage

- The study area contains much valuable natural heritage as shown by the range of designated areas including 44 pNHA's and 3 SPA's. There may be opportunities for further development of associated **nature walks, bird-watching opportunities**, and for the development of wildlife corridors within the area.
- Perhaps the greatest potential, in terms of natural heritage, for attracting visitors to the area and retaining them for longer are the **Forest Recreation Sites** operated by Coillte. These offer visitors many looped and linear walks, picnic sites, nature walks, views and opportunities to engage with the history of the area through heritage interpretation. The opportunity here is to increase the provision of information to visitors – increasing their awareness of the existence of the forests and the facilities available within them.

2.2.8 Accommodation

The audit of the accommodation sector

indicated the study area hosts the following:

- **4 hotels:** Mitchelstown (Clongibbon House Hotel and Firgrove Hotel), Kilmallock (Deebert House Hotel) and Charleville (Charleville Park Hotel).
- **38 B&B's:** the main locations are Mitchelstown (6), Kilmallock (4) and Charleville (3)
- **55 self-catering:** the main locations are Kilmallock (9), Castletownroche (10), Kilfinane (5) and Ardpatrick (3).
- **2 holiday homes:** there is one each at Kilfinane and Glenasheen
- **5 farmhouses with accommodation:** located at Mitchelstown, Kilmallock, Bruff, Croom and Kilfinane
- **5 camping and caravan parks:** located at Clogheen, Glen of Aherlow, Ballinacourty, Ballylanders and Kilbehenny
- **4 youth hostels:** at Ballingarry, Galbally, Kilfinane and Cahir

The principal accommodation clusters **within the study area** are:

- Kilmallock (15), Mitchelstown (11) and Kilfinane (10)

Accommodation clusters in close proximity to the study area include:

- Limerick City (44), Mallow (18) and Castletownroche (9)

From the data it can be seen that the primary accommodation centres within the study area are Mitchelstown, Kilfinane and Kilmallock. In close proximity to the study area the accommodation centres are Limerick City (including Castletroy), Mallow, Tipperary Town and Castletownroche.

The Ballyhoura Country study area is relatively well served by large hotels including those outside the study area and those within it such as those at Mitchelstown, Charleville and

Kilmallock. **The area could benefit from a large 5-star hotel with associated conference facilities to attract the MICE market.**

Currently there is no marketing advantage to be gained by promoting the area as a centre of sustainable tourism as only one business, Charleville Park Hotel, is listed on either the www.ghawards.ie or the Fáilte Ireland Green Pages as having environmental accreditation. Increasing the profile of the area as a responsible tourism destination could be an opportunity for the future e.g. an annual percentage increase in the proportion of accommodation with an environmental management accreditation driven through education, training and support.

Opportunities for accommodation also include maximising linkages with the food sector within the study area, using local produce on the menu and for sale within establishments. Linkages with recreation activities and local guiding could increase new businesses and encourage visitors to stay for longer in the area.

One of the principal issues with the accommodation sector is that many of the establishments are not registered with their national representative body (e.g. B & B Ireland) or with Fáilte Ireland, citing cost as a disincentive, though by not registering these establishments are cutting themselves off from being included in marketing activities for the wider region.



2.3 Destination Marketing

Destination marketing is undertaken by Ballyhoura Fáilte through its website VisitBallyhoura, the production and distribution of a series of collaterals, attendance at trade and consumer fairs, support for events and activities in the region, and the operation of a visitor information office in Kilfinane.

The budget for marketing and promotional activities in each of the past three years has been a notional €200,000, though because of cash flow limitations, it was only possible to deploy half this amount. The sources for the BF marketing budget have been: EU LEADER 75%, mix of internal and other sources (e.g. rentals, Golf Classic income, mini grants) 25%. The actual marketing budget expenditure by category of activity is shown below.

Category of Activity	Expenditure (€ '000)
Festivals & Events (i.e. walking festival, mountain biking, Beast of Ballyhoura)	20
Product Provider Training	15
Trade Promotions (i.e. Tourism Ireland & Fáilte Ireland in Germany (Frankfurt, Berlin, Stuttgart))	5
Website & Social Media	10
Brochure Production & Distribution, and Road Signs	40
Miscellaneous/General Activity	10
TOTAL MARKETING SPEND	100

The marketing activities engaged in by Ballyhoura Fáilte are extensive and many are well delivered. However, the absence of a clear marketing strategy with activities geared to meeting specific objectives, little in the way of a structured and coordinated plan, limited buy in from the private sector, and minimal monitoring and evaluation, result in an inability to demonstrate the value of these activities as being responsible for generating additional business, and to calculate the return on investment.

While the collaterals produced are useful tools, the destination website exhibits a number of weaknesses that make it difficult to use for visit planning purposes compared to other destination websites. The Visit Ballyhoura website compares unfavourably against the two other destination websites examined i.e. www.visitisleofwight.co.uk, and www.burren geopark.ie.

Shortcomings are:

1. Homepage is static, with one-dimensional and unexceptional imagery compared with the revolving, multi-image presentation of the other sites which attract the viewer's attention and interest,
2. Response time is slow – 9 to 10 seconds per page retrieval as against less than 3 seconds for the other sites, a delay that leads to many enquirers leaving the site,
3. Non-standardised presentation: variations on different pages in font style, print size, and alignment.
4. Search function not in internationally recognised place of top right corner, nor repeated on subsequent pages,
5. Language function not adopting the widespread flag presentation which creates a feeling of welcome and warmth,
6. Inconsistent breadcrumbs sequence so that when the website user checks back on the preceding page a different page to that in the original search appears,
7. Lack of smooth, direct link to providers/operators – the user has to come out of the VisitBallyhoura website to make email contact rather than having a direct internet connection on the website,
8. Haphazard, inconsistent presentation of attractions and activities with variation in the layout of features when the same page is opened on different occasions,

9. Poor online presence, including use of social media with entries provided in bursts on Facebook and Twitter (same entries in both cases) or inactive (e.g. no entries for 3 years on Vimeo and YouTube); also Twitter feed on website not working,
10. No travel planner function enabling prospective visitors to pre-plan their itineraries – see **I WIGHT** feature on www.visitisleofwight.co.uk



11. Dominance of background product information with little emphasis on marketing the attraction/ activity/ facility. The searcher needs to know where he can hire a mountain bike and how much it will cost rather than the date of foundation of the firm, the age of bikes and how many are available. It is a question of moving through the AIDA sequence: awareness> interest> desire> action.
12. Inconsistent, redundant, incomplete and- in cases – incorrect information. Examples: contact information on providers varies on different pages (e.g. Rinnaknock B & B); B & Bs with no contact information provided: wrong website indicated e.g. Gatee Valley Xtreme Adventures

As well as the shortcomings of the Ballyhoura destination website, there are many operators/providers in the region with no website of their own or where the quality is below the expectations of international tourists in terms of speed of response, range and quality of textual and photographic content, direct contact and booking facility.

Digital Marketing: Apart from the mountain biking fraternity, Ballyhoura is not a well-known tourism destination for the area's principal target markets and segments.

Heightening awareness, and interest in, Ballyhoura is, thus, a major challenge.

It is not part of the well-promoted and exposed tourism areas in Ireland (i.e. Dublin, Cork, Wild Atlantic Way); it is located considerable distance from the country's main entry points; and it has very limited marketing funds at its disposal. These factors combine to indicate that Ballyhoura is highly dependent on its destination website and other digital marketing tools in achieving the necessary reach into the homes of prospective visitors in key overseas markets. An urgent priority is to redesign the destination website addressing all the shortcomings detailed above.

In order to extend and expand its marketing reach, Ballyhoura's tourism stakeholders need to combine forces both among themselves and with outside agencies. The imminent implementation of the Munster Peaks (Great Southern Mountain Park) action plan represents one such opportunity to spread the word about Ballyhoura, as will the Failte Ireland East and South of Ireland strategy when it is finalised and implemented.

Other opportunities are through the national sectoral representative bodies and specialist sectoral marketing groups. Such collaboration can represent the lowest costs and highest return on investment for marketing a destination. One such opportunity open to Ballyhoura is in respect of the self catering sector, the area's largest accommodation sector accounting for 47% of beds and half of bednights sold, through a specific proposal made by Dream Ireland, whereby a series of marketing activities, including a Ballyhoura Destination newsletter to 100,000 households can be mounted at a modest cost – see Appendix 9 for details .

2.4 Institutional Arrangements and Funding

Organisational and Institutional Relationships: the submission made by Ballyhoura Development to the Department of Transport, Tourism and Sport on developing a Tourism Policy Statement⁵ makes a very strong and valid point on the need to have strong and effective institutional structures in place.

At the local level, given the imperative for the residents of a location to have ownership of tourism development (since tourism takes place where they live), and the philosophy that has guided Ballyhoura Development's direction and mentorship of the growth of the sector in the area, a coordinated and inclusive community consultation process is vital. "Buy in" is dependent of three factors

- Projects led and sponsored by communities e.g. the Tidy Towns scheme. Recent winners include Ballylanders, County Limerick
- Full and effective consultation, and
- Leadership and organisation through a well-structured and fully-representative community body working in the closest possible liaison with Ballyhoura Development and Ballyhoura Fáilte.

Increased consultation with, and involvement of, the local tourism and recreational service and activity providers in the Ballyhoura region has commenced (as demonstrated by the attendance of 42 stakeholders at the April 2014 workshop, the immediate result of which is five new nominations for Ballyhoura Fáilte's Board of Directors, and the recognition by a majority of participants that future funding for the organisation should be met through local, as well as national grants and EU funding, ideas including:

- an annual subscription fee/levy,

- a % of turnover from individual businesses benefitting from the VisitBallyhoura website,
- a % of visitor attraction fees, parking charges etc.

There is a vital need for the county's organisational structure for tourism (and its wider role within overall economic development) to take full account of the changes being made in Fáilte Ireland and regional tourism organisations in order to maximise the benefits from the relationship with these agencies. Unless the organisation responsible for leading the implementation of the development and marketing strategy and plan is well-connected, with effective lines of communication and influence with the national tourism agencies, is empowered both with authority and financial and technical resources, and is widely recognised and respected both within the Ballyhoura Country area and outside it, full and effective implementation of the proposals arising from the present study will be difficult to achieve.

From the Ballyhoura Fáilte perspective, support from the national agencies does not appear to be strong. In consequence, Ballyhoura Fáilte feels isolated. This relationship needs to be addressed through understanding the constraints under which the national agencies are presently working. TDI is advised that Fáilte Ireland can no longer work with individual areas, counties etc but will operate through the major strategic campaigns such as the Wild Atlantic Way and the upcoming heritage and culture branding for the East and South of Ireland. One positive example where Ballyhoura can benefit is the present operation of an All Ireland €40,000 digital marketing campaign for Mountain Biking.

For Ballyhoura to gain greater national agency support it will require a very clear, market-directed and tourism proposition that:

- has strong local support, and
- fits into the overall East and South of Ireland proposition.

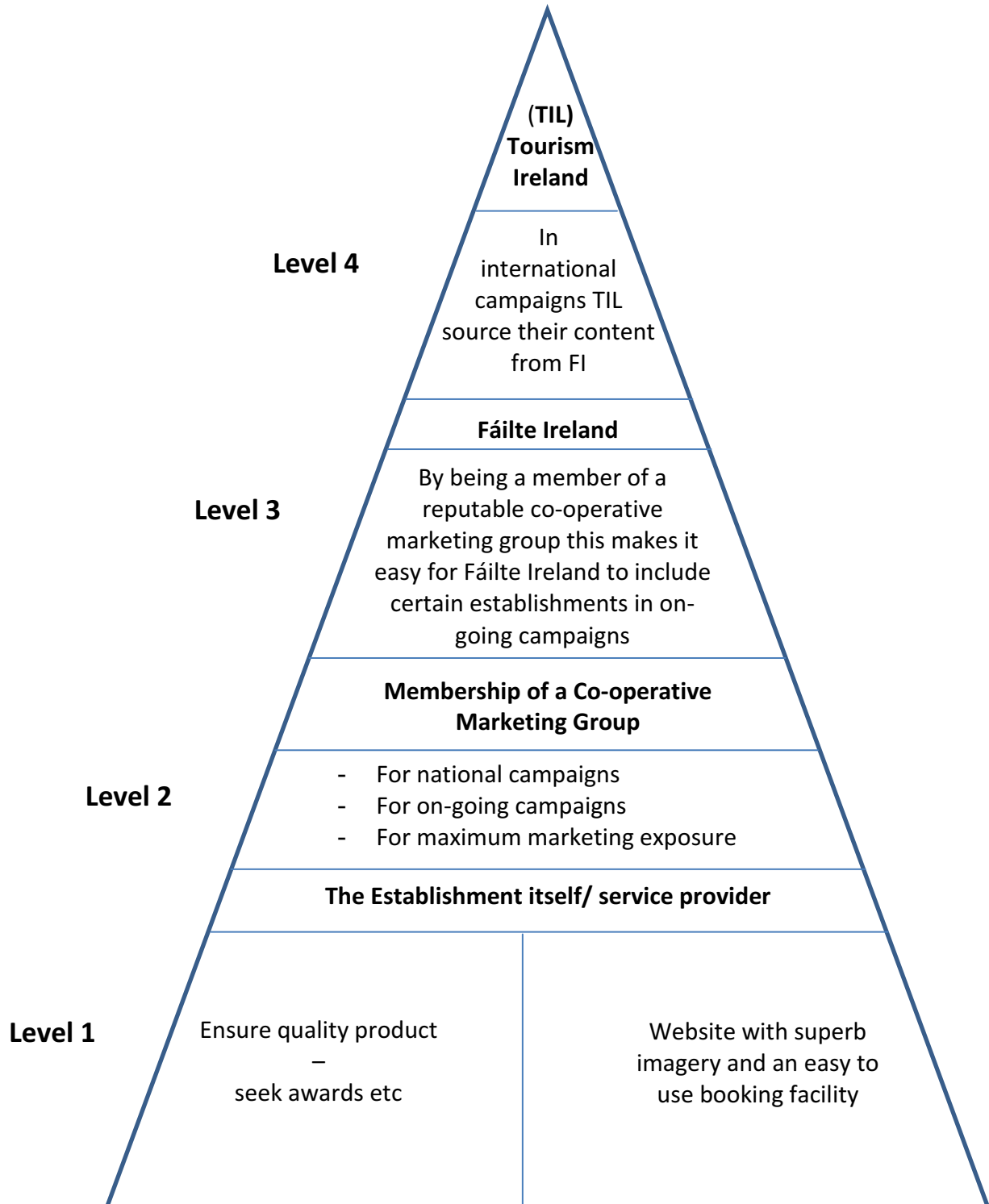
⁵ October 25th 2013

Even with these conditions met, there are prerequisites for:

- the destination website and those of individual operators in the area to be of the highest order, with easy-to-use booking facilities,
- product/experience offering is of the highest quality, actively seeking accreditation, awards etc with relevant agencies, schemes etc,
- individual product service providers should be members of appropriate cooperative marketing groups e.g. Heritage Island, BandB Ireland etc



Under these circumstances, Fáilte Ireland can include relevant entities in ongoing campaigns. The steps in this process of gaining recognition and support are demonstrated in the chart below.



Tourism Capital Development Funding: as at June 2014, no announcements are expected in the short term regarding the reintroduction of Government-sourced grant funding for tourism capital developments. Such funding has, under European competition rules, to be directed almost exclusively to non-commercial public amenity and community projects. In view of the weak state of Ireland's public finances, Fáilte Ireland has not been allocated any new funds over the past three years.

The FI website states:

"The Tourism Capital Investment Programme is currently closed and new applications are not being accepted at this time."

Rural Development Programmes: with regard to the allocation of public funds in areas such as Rural Development Programmes and local authority amenity development, The Government's *Medium Term Economic Strategy 2014-2020* states:

"During 2014 – and in parallel with the review of current expenditure – there will be a review of the capital investment framework to provide an updated outlook on the pipeline of capital support and identify key areas in which Government will prioritise its investment over the medium-term. This review will assist the Government in identifying the priority areas for investment that will ensure that, in an affordable way, Ireland has the infrastructural capacity to support and sustain economic growth."

The likelihood of any funding being released in the short term following this review may be slightly greater through programmes designed to address, for example, **rural inequality** rather than for tourism as such. TDI understands that Fáilte Ireland is not likely to propose a new general Tourism Capital Investment Programme but may instead make the case for a small number of product development initiatives addressing specific gaps identified that materially affect the full realisation of tourism potential.

2.5 Ballyhoura Country Achievements

It is clear from the site visits and consultations undertaken by the TDI team that Ballyhoura is a region that has made major progress in the development of its tourism sector since the preparation of the previous planning study in 2003. Major advances have been made in respect of:

- identifying a wide range of things for people to see and do,
- carving out a competitive advantage through the development of the mountain biking,
- the extensive involvement of local communities and entrepreneurs, either
- the re-branding of Ballyhoura Country Holidays into Student Programme Ireland
- as providers or through community clubs, and
- the use of an appropriate strapline i.e. "simply different".

Ballyhoura Fáilte has recently been involved in several projects including:

- New 50 bed Hostel – Ballyhoura Hostel in Kilfinane
- 450,000 major extension of the mountain bike trails on Ballyhoura Mountain by 50%
- Investment in the Ballyhoura Mountain bike trails
- Training for local community tour guides
- Development of equestrian trails
- Development of outdoor classrooms at Griston Bog, Lough Gur and Doneraile Court

- Attracting significant events such as the European Mountain Bike Marathon Championships on the 14th and 15th June 2014

Some operational programmes have been underway for several years and will continue to be supported where resources allow including:

- Involvement with Tidy Towns through the Ballyhoura Award
- Taste of Ballyhoura artisan food producer support and promotion
- Beast of Ballyhoura adventure race
- Ballyhoura Walking Festival
- Farmers markets
- Digital Marketing Training
- Ballyhoura Active Series of running races with 3,000 participating in 2013 and 4,000 in 2014
- Regional marketing and promotion
- Historic Graveyards Project
- Ireland Reaching Out
- Website development and social media promotion
- Festivals and events programme with new brochure in print
- Promotion of Ballyhoura at trade shows

Ballyhoura Fáilte currently have a wide range of projects either underway or that are awaiting match or grant funding. These include:

- Walks infrastructure development – 5-6 loop walks under development
- Development of equestrian trails

- Design of a new 400,000 Educational & Visitor Centre at the MTB Trail Head (currently at design stage)
- A further 600,000 extension of the Ballyhoura Mountain Bike Trails
- Signage strategy including heritage signs and signs for towns and villages
- App development for Kilmallock, Kildorrery and Doneraile towns
- Development of a new auto-grass motor racing track near Ardpark
- Development of visitor counters at visitor hot-spots
- Development of visitor information points at places with high visitor traffic around the circumference of Ballyhoura Country
- Attraction of further significant mountain bike championships such as European Championships and a leg of the World Series
- Attraction of European Adventure Race Final in 2015 and the World Final in 2016 – the achievement of which would require significant support from Fáilte Ireland and Tourism Ireland



3. SWOT Analysis

STRENGTHS

Resources and Facilities

- **Natural Environment:** uncrowded, unspoilt, natural landscape, beauty + scenery, exceptional vistas, peaceful, off-the-beaten-track, biodiversity, “Rural Ireland at its Best”
- **Historic Heritage:** archaeological sites and ruins, range of built heritage from pre history to Medieval, Palladian and Georgian, graveyards and churches
- **Outdoor Recreational Activities:** mountain biking, walking, fishing, equestrian, orienteering/geocaching, adventure activities in several locations
- **Towns and Villages:** friendly, helpful and hospitable people; traditional lifestyle food, crafts, activities; extensive cultural heritage, strong festivals programme

Organisation and Support

- **Public Authorities:** financial support for various capital funding programmes
- **Communities:** strong town and village communities and civic pride; strong community groups involved in recreation development; volunteer networks
- **Private Sector:** growing stakeholder support for more coordinated and substantive product development and marketing
- **Performance and Skills:** Centre of Excellence for mountain biking

Market Awareness and Demand

- **Access:** good access by public transport from Dublin, Limerick, Cork and Waterford to the destination; well served by road networks including the M8 from Dublin to Cork which passes through the south-west corner; the N20 which runs from Limerick to Cork via Charleville, Buttevant and Mallow; and the N24 from Limerick to Waterford via Tipperary.
- **Market Knowledge:** international awareness amongst mountain biking community through the June 2014 European championships; proximate urban areas e.g. Cork, Limerick, Kilkenny, Tipperary, Waterford

WEAKNESSES

Resources and Facilities

- **Degradation:** some towns and villages suffering from rural economic decline in common with other towns in Ireland, some roads require re-surfacing to raise them to international standards (e.g. N20)
- **Limited Tourism and Recreation Facilities:** limited 3-4-5 star hotels; 30-40 unregistered B & Bs/guest houses; lack of high quality restaurant/pub food; limited indoor children’s activities; limited evening entertainment; inadequate recreational parking facilities and picnic stops at access points and view points.
- **Attractions and Presentation:** lack of an iconic visitor attraction to act as flagship magnet; lack of product/experience bundling; lack of tourism data at the local level, public realm in some towns needs to be improved.
- **Development Resources:** scarce financial and human resources, lack of training in modern marketing

methods such as websites and social media

- **Signage:** lack of approach signage on motorways and national roads; lack of significant flagship attraction signage on motorways and national roads, very small amount (only 4 currently) of signage welcoming visitors to Ballyhoura Country at peripheral roads, lack of directional signage within the area; lack of welcome signage at entry points to towns; lack of built natural and cultural heritage interpretation signage; need for updated orientation signage.
- **Visitor maps:** lack of whole destination visitor map in both print form and downloadable from vistballyhoura.com and discoverireland.com websites, lack of downloadable high quality walking and cycling route maps with detail regarding heritage and attractions
- **Apps:** Lack of whole destination smartphone app

Organisation and Support

- **Prioritisation and Collaboration:** little history of collaboration with neighbouring areas; limited marketing collaboration and cross-selling among and between the accommodation sector and other sectors of the tourism and recreational industry; lack of inter community cooperation and awareness, lack of awareness amongst the Ballyhoura tourism trade of things to see and do in the area
- **Identification of the Study Area:** weak sense of a cohesive destination at both local and national levels; disconnect between operators in the central and northern parts of Ballyhoura with Doneraile in the south

- **Community Issues:** insufficient trickle down of economic benefits e.g. economic benefits of tourism e.g. limited revenue from visitors participating in mountain biking or visiting Lough Gur flowing to communities; spinoff benefits are small at present due to high volumes of day-trippers and short stay visitors – low visitor yield
- **Investment:** need for funded drivers of projects due to resource constraints; insufficient business innovation, need for increased private sector corporate sponsorship in context of declining public sector funding
- **Tourism Bodies:** Lack of key contact available from Fáilte Ireland due to reduced public sector resources

Market Awareness and Demand

- **Transport:** while there is a good quality road network into and through the area this results in corridor tourism with many people passing through the area without stopping. Poor local rural transport links within the destination area.
- **Individual and Cohesive Identity:** lack of local population identity with Ballyhoura which is seen by many as a marketing constructor the region rather than a clearly defined area; lack of identity in the marketplace beyond mountain biking.
- **Marketing:** lack of direct connection from VisitBallyhoura website to individual operators for further information and bookings, lack of international marketing due to lack of identity and funding, lack of cohesive digital marketing strategy, lack of social media presence; lack of brochures and information supplied to hotels and B&B's, lack of YouTube

videos for attractions, activities, food and craft to raise awareness and stimulate interest

OPPORTUNITIES

Resources and Facilities

- **Activity Product and Experience Development:** active participation in the proposed Great Southern Mountain Park as a collaborative recreation destination of excellence; packaging and bundling of attractions and accommodation and transport with a range of recreational activities e.g. walking, cycling, angling, equestrian etc.; development of further walking and cycling trails in response to community demand, development of tree top adventure park in either Ballyhoura or Galtee Mountains, Galtee mountain chair lift, downhill mountain bike course to international standards, further development of the auto-grass track due to be completed soon, introduce transport drop and collect service to nearby mountains
- **Cultural Heritage Product and Experience Development:** presently under-developed medieval architectural heritage; development of education programmes in conjunction with Doneraile House and Gardens, Lough Gur Visitor Centre; capitalise on the educational potential of the geology, built heritage, cultural heritage etc; develop multi-purpose indoor event centre, develop food trails based on local provenance of items and link to hotels and capitalise on Origin Green promotion; create an extended range of traditional entertainment in the evenings; create an extended range of family activities; further development of the genealogy product offering.

- **Hub and Spokes:** extend the range of thematic touring itineraries using different access points into the region and focusing on flagship attractions such as Doneraile, Lough Gur and the Ballyhoura Trailhead as the hubs with clusters of attractions, features and facilities on the designated routes as the spokes

Organisation and Support

- **Education and Learning:** learning from other rural, mountain destinations; community information campaign; increased local tourism businesses participation in Fáilte Ireland training programmes; encourage tourism businesses to join environmental accreditation schemes so that the area can be promoted as a responsible tourism destination
- **Collaboration and Partnerships:** strengthening of partnerships between community-based recreation and tourism organisations i.e. VisitBallyhoura; developing linkages between communities; marketing “co-opetition”; active participation in the implementation of the proposed Great Southern Mountain Park through its steering group and leadership
- **Improved Benefits:** measures to increase economic benefits between tourism and recreation operators and local suppliers

Market Awareness and Demand

- **Ballyhoura Country Brand Marketing:** development of a clear Ballyhoura destination proposition based on the “experiences” of the region, targeting the broad “Sightseers and Culture Seekers” segment (and the Culturally Curious, Great Escapers and Social Energisers sub-segments falling largely within that umbrella segment category)

- **Digital Marketing:** remodelling of the destination website of the highest quality with easy-to-use features including a direct link with individual operators websites through the VisitBallyhoura website, and a travel planner facility in line with the five stages of the “digital consumer journey”; the creation of high quality websites by individual Ballyhoura tourism operators linked into, and readily accessible from, the destination website thereby encouraging “lookers into bookers”
- **Corporate targeting:** many large IT companies now have their headquarters based in Dublin, two-to-three hours from Ballyhoura, with thousands of young employees looking for weekend entertainment.

THREATS

Resources and Facilities

- **Damage of Natural Features from Increased Uses:** for example off road trail biking, adventure races and quad biking
- **Inadequate Development of Signage and Facilities:** inadequate and inconsistent signage on trails and roads; failure to develop the accommodation sector in line with market requirements; inadequate development of family attractions, night-time entertainment etc.
- **Economic Decline:** Lack of buy-in to collaborative marketing approach and awareness of economic opportunity to be derived from tourism leading to reducing market share, continued local economic decline, urban degradation and population emigration

Organisation and Support

- **Local Industry Collaboration, Partnerships and Support:** failure of individual operators to work together to develop “clusters” and touring routes of tourist attractions; lack of collaboration with, and membership support for, regional destination marketing for Ballyhoura destination marketing.
- **Inadequate Funding:** lack of financial and human resources to implement the full range of actions identified in the Plan.
- **Planning and Implementation:** inadequate coordination of plan implementation; loss of momentum without quick wins; creation of false hopes/expectations.
- **Limited Local Support:** little clear increase in economic benefits to the local communities leading to growing disaffection with tourism and recreation development.

Market Awareness and Demand

- **Low Market Awareness:** failure of the tourism trade to adopt the Plan’s marketing strategy and activity proposals leading to continuing limited market awareness and poor establishment of the Ballyhoura brand positioning.
- **Inadequate Targeting and Packaging:** failure to create market-ready products and experiences in line with the needs of the targeted segments in international markets.

4. Opportunities and Prospects

Challenges and the inter-related opportunities for stimulating growth are considered under the following sub-headings:

- *Product/Experience Range and Delivery*
- *Regional Collaboration and Partnership*
- *Positioning and Branding*
- *Human Resource Development*

Product/Experience Range and Delivery:
Ballyhoura has three major attributes for tourism:

- It has an outstanding natural environment that lends itself to many outdoor activities of both “hard” (physically demanding) and “soft” (gentle and relaxing) forms.
- It retains the style and spirit of Ireland’s rural areas and small towns.
- It has a number of major built heritage and cultural features with the potential to act as major “attractors” to the area.

In its tourism development and marketing to date, Ballyhoura has, on one hand, done what many destinations with extensive natural resources have done. It has identified and promoted a wide range of activities for tourists (including being the first, or certainly one of the first, destinations in Ireland for geocaching), with the possible risk that it can be seen to be trying to be “all things to all people”.

On the other hand, it has developed a clear and distinct competitive advantage through the mountain biking circuits, with the risk here being that non-bikers may be deterred from coming to the area because of the high concentration of publicity on the activity leading to the belief among “ordinary” tourists that they will be swamped by bikers and not catered for.

The challenge will be to turn the problem of offering a bit of everything into an advantage by attracting more of the;

- general interest tourists (i.e. those wanting a bit of nature and a bit of culture with a large helping of Irish hospitality and “the simple life” mixed in) to come to the area. N B None of these individual components are strong enough to determine the destination selection choice, and they are too widely spaced to create good touring circuits without the need to drive several kilometres between features; and
- adventure/activity enthusiasts and the domestic recreationist day trippers attracted by the calibre and range of the different outdoor activities; and

In order for Ballyhoura Country to achieve a substantial growth in the economic benefits it receives from tourism, two strategies are necessary: first, a broadening out of its market appeal beyond the mountain biking and outdoor activity enthusiast; and, second, a strengthening of the appeal of its outdoor activities.

That will entail:

- the expanded development and use of destination “attractors” such as Doneraile House and Demesne and the Lough Gur Visitor Centre in the area’s marketing and promotion.
- the clustering of natural features, cultural attractions and outdoor activities in manageable touring circuits, and
- an increased range of tourist activities and associated facilities in those outdoor adventure/activity products that are already offered but on a limited, uncoordinated basis, in order to attract greater volumes of both day trippers and overnight visitors.

Matching the products/experiences offered to the demands and preferences of the Sightseers and Culture Seekers tourist, the Adventure/Activity Enthusiast and the Recreational Day Tripper is vital.

Themed, as well as geographic, touring circuits will be needed in order to cater for the niches within the Sightseers and Culture Seekers segment such as those interested to pursue their family's heritage (i.e. reverse genealogical tourist) or to participate in an activity like geocaching since tourists in these niches are open to longer stays in a region if an interesting range of cultural and natural features are accessible.

In order to extend the range and variety of products/experiences available, the recent announcement that the Office of Public Works will increase access to, and improve the services offered in, the heritage buildings it manages is a strongly positive development.

Drawing the Sightseers and Culture Seekers segment to the Ballyhoura Country area in significant numbers will necessitate:

- the development of major landmark attractions in the area, and
- to feature these centrally in the marketing communications for the region so that they act as magnets drawing in visitors.

One such possible flagship is Doneraile House and Demesne which already attracts in excess of 100,000 visitors a year and is in the on-going process of a major upgrade and extension of facilities.

Allied to the major "attractors" will be the need for trails in the form of tourism circuits to be developed featuring, and with links to, other attractions, facilities and amenities in the region.

For the Adventure/Activity Enthusiast and the Recreational Day Tripper, improved and expanded outdoor pursuits and facilities

servicing these is needed so that Ballyhoura develops its reputation for all forms of outdoor activity and caters for all levels of skill in engaging in them.

Regional Collaboration & Partnership: an individual local region like Ballyhoura Country can establish itself successfully as a specialist centre for a specific interest or activity, such as has been done with mountain biking. However, it is far more difficult for it to gain a clear comparative advantage when targeting the general interest tourist, such as the Sightseers and Culture Seekers, since there is considerable overlap in the types of products/experiences available in many rural areas both in Ireland and other countries.

By partnering – both with neighbouring regions and with representative sectoral bodies and specialist sectoral marketing groups – Ballyhoura can achieve greater mileage from its marketing funds.

Partnering with neighbouring regions that have some common features but also many distinctive and complementary resources and attractions can benefit each constituent region of the partnership both because of the extended menu of products/experiences available and the greater marketing clout for the combined region resulting from a pooling of marketing resources. Within such a grouping, a clear collective branding can be developed with each constituent region having its own positioning.

The recent Munster Peaks (Great Southern Mountain Park) concept development and feasibility plan, funded by the various LEADER companies, local authorities and Fáilte Ireland, examined the development of a branding proposition for the four contiguous mountain ranges – the Comeraghs, the Knockmealdowns, the Galtees and the Ballyhouras. This represents a major opportunity for ensuring Ballyhoura constitutes part of the regional tourism product offering. Following approval and launch of the Munster Peaks plan, a company to implement the proposed action plan has been established. The company includes

representatives from Ballyhoura and will be a significant entity in the realisation of Failte Ireland's strategy for the East and South of Ireland, a new destination presently in the process of finalisation.

Ballyhoura's accommodation sector is made up of a large proportion of self-catering properties and relatively small numbers of B & Bs, hotels, farmhouses and other types of accommodation. There is little coordination between the different enterprises in their marketing: the common view is that it is marketing the Ballyhoura area as a tourism destination is the responsibility of Ballyhoura Failte. By joining up with the body representing the sector nationally (e.g. B & B Ireland, Irish Hotels Federation), individual operators from a region like Ballyhoura can help raise market awareness of the area. The presence of several enterprises from Ballyhoura in the body's membership ensures that the area is featured in listings and marketing.

The existence of specialist marketing groups focused on specific accommodation sectors represents an opportunity for Ballyhoura to increase its market presence. A proposal has been submitted by Dream Ireland, the leading self catering marketing group, to mount a dedicated destination feature reaching a customer database in excess of 100,000 if individual operators sign up with the marketing group, and the destination tourism body makes a modest contribution to cover costs of design, mailings etc. Not only would such an exercise generate business for the individual enterprise through the marketing reach of the marketing group, but it would also raise the profile of Ballyhoura as a strong destination for self catering operations.

Positioning and Branding: As already noted, the creation of a separate brand for the Ballyhoura Country area will be difficult to sustain, if targeted at its primary opportunity Sightseers and Culture Seekers tourist segment, because this category of traveller will typically visit a number of destinations. The opportunity for Ballyhoura will be in developing its positioning as an essential component of a tour of the "real,

rural Ireland" offering both major cultural and natural heritage "attractors" and a range and variety features and attractions accessible through touring circuits, in essence laying claim to being "the heart of rural Munster".

Such a positioning needs to be allied to the extension, upgrading (as necessary) and coordinated range of adventure/activity outdoor pursuits, focused on both the dedicated participant (the "hard" Adventure/Activity Enthusiast) and the casual, occasional "soft" user, typically on a recreational day visit to the area, or combining an outdoor activity with a touring component (i.e. the typical mix for the Sightseers and Culture Seekers tourist).

This combination – of cultural and natural heritage features, and range of top class outdoor pursuits – can serve to establish a clear and distinctive identity for Ballyhoura.

Human Resources Development: the Ballyhoura Development Tourism Policy Statement submission stresses the urgency of developing a comprehensive (from school leaver to manager) human resources development strategy for the hospitality and tourism sector, and a structured, phased and fully integrated implementation programme to produce the right level and quality of knowledge and skills to ensure that Ballyhoura can meet the needs of the visitor from its own people.

Boosting the education and training component is a key to getting the private sector to be more willingly involved in the development and marketing of the area since the availability of a range of professional and vocational skills courses will be a tangible way of demonstrating support for the tourism sector. If more opportunities for personal skills advancement are provided, a greater commitment to the sector as a whole can be encouraged.

5. Ballyhoura Country 2020: Vision and Key Strategies

5.1 Vision and Proposition

As part of the Munster Peaks (proposed Great Southern Mountain Park) study area), Ballyhoura Country shares the distinguishing features of that broader region which provide it with its significant competitive strengths to be incorporated within its vision statement.

First, for many prospective visitors in the broad Sightseers and Culture Seekers segment (incorporating the Culturally Curious, Great Escapers/Scenic Relaxers, Social Energisers and Nature Lovers sub-segments), the attraction of the study area is the fact that outdoor activities can be combined with visits to the area's towns and villages, giving them exposure to the wide range of nationally significant built heritage in Ballyhoura, and interaction with, and exposure to their way of life of, the residents of these centres, away from the urban hustle and bustle in which many such potential visitors spend their lives.

Second, as well as strong natural features and cultural heritage, where vestiges of a traditional lifestyle and values remain, Ballyhoura Country offers an abundance of opportunities afforded by the mountains, lowland areas and inland waterways for outdoor pursuits – both activities and adventure pursuits of differing degrees of physical arduousness i.e. “soft” and “hard” recreation.

It is this combination of natural and cultural heritage, manifested through the diverse range of outdoor activities possible, exposure to the history of the area, and interaction with its people that creates the competitive advantage of Ballyhoura Country giving it differentiation and distinctiveness.

The range of experiences on offer in Ballyhoura Country has wide appeal and promotion of the area can be targeted at:

- The Culturally Curious and Great Escapers sub-segments within the Sightseeing and Culture Seekers segment of the international market, looking to combine soft/ hard adventure activity with heritage-related activity, and
- Visitors seeking hard & soft adventure activities, principally drawn from the Adventure/Activity Enthusiast, and Recreational Day Tripper segments

The attraction of the first group of segments will be based on positioning Ballyhoura Country as an essential component of a tour of the ‘real, rural Ireland’ - the “heart of rural Munster” - offering both major cultural and natural heritage ‘attractors’ and a range and variety of features and attractions accessible through touring circuits.

The focus on the second set of segments will underpin the area's originality, reflecting the fact that Ballyhoura is a top destination for a range of adventure/activity pursuits.

Both these aspects are reflected in the vision statement. The goal is both to broaden the appeal of Ballyhoura as a destination for the key international market segment of Sightseers and Culture Seekers, and to increase market penetration in the Adventure/Activity market.

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

To firmly establish Ballyhoura Country as an outstanding Tourism and Recreational destination in the Heart of Rural Munster offering an exceptional range and quality of experiences in outdoor activity pursuits, and living and built cultural heritage that will bring significant socio-economic benefits to the residents and businesses of the area and a better experience for the visitor.'

The destination proposition relates to the variety and quality of product experiences available to visitors – not trying to be all things to all people, but meeting the varied expectations of the target market segments. The primary target visitor segments are those who want to combine experiences in the natural environment of the area (e.g. “soft” adventure walks involving fine vistas over the countryside) with the built heritage (e.g. visiting features like Doneraile and Lough Gur) and interaction with the people of Ballyhoura and their lifestyle (e.g. eating food with a local provenance, experiencing traditional entertainment), and doing these things on successive days during their visit.

5.2 What will Success look like in 2020

When planning ahead it is important to consider where we would like to be at the conclusion of the plan period in 2020 – so if as many of the actions contained within this plan are implemented as feasible what would the situation be in Ballyhoura Country?

For Ballyhoura Fáilte:

- Seen as one of the leading destination management organisations in Ireland and used as an example by others for innovative practice;
- Largely self-financing;

- Viewed by the local community and local businesses as a vehicle for innovation contributing to vibrant communities in the Ballyhoura area.
- Ballyhoura Country seen as having a strong role within the East & South overall strategy and engaging in effective collaborative marketing with other destinations such as the proposed Great Southern Mountain Park
- Tie in with Wild Atlantic Way through Limerick City gateway to the WAW.

For residents & businesses in the Ballyhoura area:

- More local tourism-related local employment
- Vibrant local communities and town/village centres
- More higher spending visitors and increased yield per visitor overall
- Collaborative marketing
- Increased awareness of local product offer
- Improved quality of life
- Increased visitor numbers to signature attractions and activity providers

For Visitors to Ballyhoura

- Wide range of interesting high quality experiences encompassing built/ cultural/ natural heritage and activities
- Easy access and transport options
- Better experiences leading to increased satisfaction and repeat visits
- View Ballyhoura as a cohesive family and activity destination

5.3 Key Strategies

To realise the proposed vision there are five recommended key strategies for Ballyhoura Country over the 2015-2020 period. These follow best international practice for destination development and form the foundation for the action plan in the next section.

Key Strategy 1: The Team Approach – Increasing Collaboration, Partnership & Buy-in

As explained earlier in this document, the national tourism agencies are being obliged to pull back from all the various marketing/destination organisations throughout Ireland. Therefore, Ballyhoura needs to be self-sustaining, working together with its partners. The need for a cohesive and wide-ranging strategy to increase collaboration, partnership and buy in at all levels – but starting with tourism and recreation stakeholders in Ballyhoura itself, and in the broader Munster Peaks (Great Southern Mountain Park) – is of pre-eminent importance.

The initial signs of progress resulting from the April 2014 stakeholder Tourism & Recreational Seminar are highly encouraging with new Ballyhoura Fáilte board member nominations being generated and wide recognition of the need for funding support from within the region. However, this should only be the start of a concerted strategy to galvanise support across all tourism and recreational providers in Ballyhoura and their suppliers.

The components of such a strategy will include:

- The identification of, and support for, community champions to communicate the story of the destination and garner support,
- The organisation of a programme of activities around the region, comprising presentations, meetings and other collaborative events, to present the opportunities and contribution of

tourism, how all sections of society can benefit from tourism, and the role of tourism in rural regeneration, with the twin objectives of:

- Creating understanding of how tourism can bring benefits throughout Ballyhoura, and
- Building a sense of pride and unity among stakeholders and communities,
- The identification and implementation of fund raising mechanisms (through majority commercial operation funding) designed to make Ballyhoura Fáilte financially independent and to generate sufficient funds to permit it to conduct well-designed and full destination marketing campaigns,
- Close study of successful examples of obtaining wide and extensive collaboration in, and buy in for, tourism e.g. Burren Geopark,
- Articulate how Ballyhoura can be a major part of the implementation programme of the Munster Peaks (Great Southern Mountain Park) project and work closely with the other component destinations (e.g. Glen of Aherlow) in the implementation of the proposed development and marketing programme to ensure Ballyhoura is both fully incorporated and featured in the activities undertaken,
- Ballyhoura should cluster up with the gateway centres in its neighbouring regions, such as Limerick,
- Individual tourism enterprises – in the various sectors of the industry - enrolling in the national representative body for their sub-sector; and

- Ballyhoura (through Ballyhoura Failte and individual self-catering enterprises) working in partnership with the leading marketing group for the sector in preparing a Destination Ballyhoura print and online newsletter and distributing it to over 100,000 interested parties.

Key Strategy 2: Developing Signature Attractions, Increasing Things to See, and Upgrading Outdoor Activities

In order to meet the needs and expectations of the target market segments specified in the product: market matrix in the following section, a more extensive range of tourism products/experiences will be required to be developed in Ballyhoura. The opportunities identified in the 2003 Ballyhoura Attractions Cluster Development Strategy remain valid today. Ballyhoura has been outstandingly successful in developing the mountain biking component of the product/experience developments identified in that plan; it has been less successful in realising the potential for other outdoor activities (e.g. walking, equestrian) and its outstanding cultural heritage.

The focus for the coming period should be on creating the means by which the potential in these other areas can be fully realised.

The hub and spoke concept, whereby visitors are drawn into the destination by a major attraction, and then are encouraged to stay longer and travel around other features in the area through well-structured itineraries/ touring routes of clustered attractions and activities, is central to TDI's proposals for product/experience development. This requires ensuring both that the signature attractions are sufficiently powerful to bring in visitors, and that the touring routes provide a sufficient number of well-delivered features itineraries on circuits that takes full account of travel times, conditions etc.

Such features should comprise a variety of natural sights and cultural heritage elements that reflect the character and distinctiveness

of Ballyhoura e.g. local cuisine, traditional music and dance

Strengthening the appeal of both mountain biking, for which Ballyhoura has international recognition and reputation, and other outdoor activities, for which the area has equal potential but less standing in the marketplace, is the second product development priority. The Walking Festival should be upgraded, while major equestrian trails and events are needed to establish Ballyhoura's reputation as a premier location for such activities.

Map 8: Tourism Product Clusters



KEY

- Railway
- Railway Station
- Study Area
- Lough Gur Visitor Centre
- Ballyhoura Trailhead
- Doneraile Court & Gardens

- 1 The New Church, Lough Gur (1678)
- 2 Great Stone Circle (2000BC)
- 3 Friars Gate Theatre
- 4 Collegiate Church (13th Century)
- 5 Kilmallock Friary (1291)
- 6 Kilmallock Museum
- 7 King John's Castle

- 8 Ballyhoura Trailfinders
- 9 Cosh Earthworks (1000BC)
- 10 Kilmallock Outdoor Education
- 11 Doneraile Playground
- 12 Kilmallock Hostel
- 13 Doneraile House Hotel
- 14 Cragh House

Key Strategy 3: Providing a High Quality Visitor Experience

Visitor satisfaction is not directly correlated to the range and sophistication of the facilities and amenities. A significant component in the visitor experience is the human factor, the service received from both front line tourism personnel and the interactions the visitor has with members of the community during the visit in shops, on the street etc. Ireland scores heavily in general in respect of the warmth of welcome accorded to visitors. This must be a central feature of the visitor's experience in Ballyhoura.

Apart from vocational and management training programmes, and community awareness activities (such as mentioned under Key Strategy 1), the sense of quality of service can be achieved through measures such as:

- Welcome signage at gateways into the region and in towns in Ballyhoura,
- Local guides and storytelling in way that is differentiated and distinctive to Ballyhoura, and
- Evening and other activities which welcome visitors that celebrate Ballyhoura's distinctive rural cultural heritage.

Key Strategy 4: Destination Marketing – Focusing on each Segment and Sector

The visitor flow to Ballyhoura has three components: day trippers, domestic overnights, and international. Marketing needs to be targeted at each of these broad segments through the most relevant agencies.

Separate marketing approaches are needed both for these segments and the different accommodation sectors, divided between what Ballyhoura Fáilte can do itself and what it will need to rely on the national agencies and other partners for.

Marketing for the different accommodation sectors should not be mounted as an independent initiative by Ballyhoura Fáilte as the cost to mount an impactful campaign will be very high with the likelihood of poor return on investment; instead, Ballyhoura Fáilte and individual operators should link cooperatively with relevant trade associations ("mother ships"), large marketing groups to partner with/piggyback on, and the Munster Peaks programme.

Key Strategy 5: Destination Marketing - Using Digital Technology to Generate Business and Increase Brand Awareness

As explained earlier in section 2.3. Destination Marketing, Ballyhoura will be increasingly dependent in coming years on its effective use of digital marketing to attract its targeted level of visitors. There are two factors behind this statement:

- consumers are relying more and more on the internet and social media to research – and book – their tourism destinations, and
- the limited market awareness, and relative remoteness, of Ballyhoura.

More and more Ballyhoura will need to implement a digital strategy which has the potential to be cost effective, innovative, focussed and fully geared to meeting consumers' planning and booking needs.

Having websites of the highest quality is an imperative both for Ballyhoura Fáilte and individual tourism providers in the region. These should be designed to fully meet the requirements of the five stages of the Digital Consumer Journey, as developed by Fáilte Ireland – see example for the Great Escapers market segment on:

http://www.Failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/2_Develop_Your_Business/3_Marketing_Toolkit/9_International_Sales_Toolkit/5-stage-consumer-journey-p32-33.pdf.

One of the key needs is for prospective visitors to be able to make reservations without coming out of the VisitBallyhoura website. A direct online booking link to service providers in the region is vital, while possible partnerships with online booking organisations such as booking.com, and expedia should be explored.

Posting blogs and other material on the social media sites, as well as its own website, can enable Ballyhoura Fáilte to be perceived as both relevant and up-to-date. By relating events and stories, showing people and places etc, digital marketing can bring a destination to life for people looking for their next destination to visit.

TripAdvisor is an increasingly powerful medium influencing consumers' purchase decisions. The TripAdvisor button should be on Ballyhoura destination and operators' websites so consumers can see how past customers assess the region and its products/experiences.



5.4 Product: Market Matrix

The markets and segments to be targeted through the programme of product/experience development and marketing strategies and action programmes are summarised related to the broad product/experience category in the matrix below.

The preparation of the matrix is based on the following principles:

1. The strength of international market segments for outdoor activity pursuits, combined sightseeing and cultural heritage interests, and those seeking escape from urban lifestyle pressures,
2. The development of a set of Ballyhoura Experiences (i.e. things to see and do) that can merit, in the prospective visitor's eyes, a one-to-four day stay in the area, and
3. The need to develop an identity that is differentiated from, but complementary with, the profiles and characteristics of Ballyhoura's neighbouring regions, in particular the other destinations within the Munster Peaks (Great Southern Mountain Park)

The matrix uses the segmentation analyses developed over recent years by the national tourism agencies, both the broader Sightseers and Culture Seekers analysis and the narrower segments adopted currently. It is recognised that the sub-segments do not fit precisely within the original Sightseers and Culture Seekers category but the variation is not significant for the purposes of planning for the future development of the Ballyhoura region. The VFR category is not included in the matrix since such visitors may exhibit characteristics and preferences across the range of segments.

Product Market Matrix

Markets/market segments Product/ Experiences	Domestic (Ireland)		International (focus on Britain, France, Germany, other Europe, US)				All Markets		
	Recreation day trips	Overnight or longer holidays inc. Footloose Socialisers	Sightseers & Culture Seekers				Adventure/Activity Enthusiasts	Coach Tours	Special interest (e.g. reverse genealogy)
			Culturally Curious	Great Escapers/Scenic Relaxers	Social Energisers	Nature Lover			
OUTDOOR ACTIVITIES									
Walking/hiking	*	*	*	*		*	*	*	*
Cycling (inc Mountain Biking)	*	*		*			*		
Other outdoor activities (equestrian, angling, on water, geocaching etc)	*	*		*			*		
Nature – soft adventure, bird watching, etc	*	*	*	*		*			*
Events/Festivals	*	*	*	*	*	*	*	*	*
CULTURE/HERITAGE									
Built heritage/sites (day visits)	*	*	*	*	*	*		*	*
Events/Festivals	*	*	*	*	*	*		*	*
COMBINED OUTDOOR/ & HERITAGE									
Ballyhoura Experience Touring Routes		*	*	*		*		*	*

5.5 Targets and Economic Impact

Need for an Accommodation Survey

Existing tourism statistics produced by the Central Statistics Office and Fáilte Ireland do not allow for the measurement of tourism in the Ballyhoura area. Existing overseas visitor statistics are available in a limited fashion at county level, while domestic tourism statistics are only available at a regional level. Whereas existing official tourism statistics can provide broad benchmarks for Ballyhoura, in order to more effectively measure tourism performance in the area it is recommended that a survey of accommodation premises be established on an annual basis, similar in concept to the study conducted in 2012 which established the estimate of 184,000 staying visitors used in the LIT study. The measurement of overseas and domestic visitors to Ballyhoura would thus be based on staying visitors in paid accommodation.

The most important factor in setting up a successful accommodation survey will be buy-in from the accommodation providers in Ballyhoura, and the role of Ballyhoura Fáilte will be critical in this regard. The effectiveness of the measure will be dependent on the level of participation that can be achieved in order to provide the best possible coverage of accommodation in the area. Information required from the survey will include:

- Rooms/Beds/units/pitches available
- Rooms/Beds/units/pitches sold
- Country of residence of staying visitors to include Overseas (Britain, North America, Mainland Europe and other areas), domestic and Northern Ireland.

The survey will need to be conducted throughout the year and would ideally be conducted on-line with a capacity to include telephone interviews as required to ensure appropriate coverage of all accommodation sectors.

The results of the survey would be weighted to population estimates for bed spaces or equivalent for all accommodations in Ballyhoura and will provide estimates of staying visitors in paid accommodation that can be monitored year on year for the period under review.

Indicative Targets and Economic Impact

In recognition of the need for guidance on the present values of tourism and future targets, TDI has made estimates based on the 2012 base year calculations outlined in section 2.1. through the application of national forecast growth rates for overseas and domestic tourism.

A forecast for Ballyhoura should start with the overall performance outlook for Irish tourism. A target for Ballyhoura would then reflect the marketing and development initiatives proposed in the development plan.

Projected growth rates for Irish tourism are as follows: -

Projected Growth Rates (%)	Overseas Tourism	Domestic Tourism
2014 - 2016	+5 - 6%	+1%
2017 - 2020	+3 - 4%	+2 - 3%

The calculation for Ballyhoura overnight visitors for the period to 2020 is made as follows:

Step 1 – take the 2012 numbers of visitors spending overnights in the Ballyhoura area, estimated by TDI as between 106,200 staying 3 nights or 212,400 at 2 nights,

Step 2 - use the overseas:domestic split as identified in the LIT work i.e. 53:47,

Step 3 – apply the national growth rates for overseas and domestic visitors, the latter to include VFR visitors and day trip (i.e. 2013 provisional growth rates, mid-point of growth rate ranges 2014 – 2016 and 2017 – 2020 from the official projections shown above)

The national growth rate for domestic tourism has been applied for forecasts of day trippers while for VFR visitor a rate slightly higher than for domestic tourism has been used to reflect the fact that VFR visits included both overseas and domestic visitors

This exercise produces indicative targets of visitor nights (for those staying in the region) and day trippers to Ballyhoura for 2016 and 2020 as indicated below before the divide symbol. The growth rates on which these estimates of future visitation have been calculated are the national average. It can be anticipated that Ballyhoura will outperform the national average given full and successful implementation of the development and marketing proposals outlined in this plan. A target of 10% above the level calculated on the national average is suggested as an achievable target. The revised targets are shown following the divide symbol.



Year	Overseas Overnight Visitor/ Guest Nights ('000)	Domestic Overnight Visitors ('000)	Combined Overseas and Domestic Overnight Visitors ('000)	VFR Visitors ('000)	Day trippers ('000)
2012	169	150	319	78	282
2016	210/231	156/172	366/373	83/91	293/312
2020	240/265	174/191	414/456	93/102	323/355

Using the same levels of spending as in calculating the base revenue figures for 2012 in section 2.1., visitor revenue targets can be set for Ballyhoura.

The resultant figures are shown in the table below. Total revenue targets for Ballyhoura for 2016 are between €50 and €55 million; while by 2020 the target is approaching €62 million. While these targets assume a better-than-national average performance – to the tune of 10% - in respect of attracting visitors, they do not factor in any increases in the average length of stay or daily spending that could be anticipated from the proposed improvements and extensions to the products and experiences offered in the region over the period. It could be reasonable, therefore, to set the targets somewhat higher than indicated.

Year	Overseas Overnight Visitor/Guest Nights (€ mn)	Domestic Overnight Visitors (€ mn)	Combined Overseas and Domestic Overnight Visitors (€ mn)	VFR Visitors (€ mn)	Day trippers (€ mn)	TOTAL (€ mn)
2012	15.2	7.5	22.7	11.0	11.1	44.8
2016	18.9/20.8	7.8/8.6	26.7/29.4	11.7/12.9	11.5/12.3	49.9/54.6
2020	21.6/23.9	8.7/9.6	30.3/33.5	13.1/14.4	12.7/14.0	56.1/61.9

Applying the Fáilte Ireland standard coefficient of 36 jobs created by each €1 million of visitors spending, suggests an employment base in excess of 1,500. By 2016, the region could support between 1,500 and 2,000 jobs, while by 2020 employment from tourism should be between 2,200 and 2,300 if the target revenues are achieved.

6. Ballyhoura Country 2020: Institutional, Development and Marketing Action Plan

The following marketing and product development programmes are proposed for Ballyhoura Country over the strategy period from 2015 to 2020:

- 1 **Ballyhoura Fáilte Operation & Funding**
- 2 **Stakeholder Engagement – Trade, Community & Tourism Bodies**
- 3 **Stakeholder Engagement – Collaboration and Linkages**
- 4 **Stakeholder Engagement – Training & Development**
- 5 **Product Development – Flagship Experiences**
- 6 **Product Development – Recreation**
- 7 **Product Development – Heritage**
- 8 **Product Development – Accommodation**
- 9 **Visitor Experience – Access, Orientation & Signage**
- 10 **Visitor Experience – Information & Education**
- 11 **Marketing & Promotion – Brand Awareness & Narration**
- 12 **Marketing & Promotion – Digital Marketing & Social Media**
- 13 **Marketing & Promotion – Regional Marketing & Promotion**
- 14 **Monitoring & Evaluation**

TDI would like to note the following points in relation to the action plan programme areas: While these programme areas relate to the key strategies outlined earlier in section 5.3 there is an inter-relationship and overlap between programme areas, for example developing signature experiences and product development will impact upon visitor experience; aspects of marketing and promotion will be closely linked to stakeholder engagement.

While the order of the programme areas 1-15 follows that of the key strategies each programme area incorporates a variety of timelines and the action plan as a whole is not designed to be sequential.

While stakeholder engagement, product development and visitor experience are seen as essential components, effective marketing and promotion of the destination is seen as key to the success of the overall strategy.

While the actions within each programme refer to the target audience e.g. Culturally Curious, further detail regarding segmentation analyses can be found in the Product:Market Matrix in section 5.4

In the subsequent tables the overall objective and supporting rationale for the actions within each programme area is outlined, highlighting product opportunities, followed by a specific action plan identifying primary and support responsibilities, timeline for completing the action and key performance indicator.

Programme 1: Ballyhoura Fáilte Operation & Funding**Rationale**

The aim of this programme is to ensure Ballyhoura Fáilte becomes **largely self-financing** over the period of the plan, with the reduced public sector funding unlikely to change in the medium term. This includes:

- Action 1.1, regarding **payment of a subscription fee**, which will contribute to the cost of, and facilitate, Ballyhoura Fáilte's marketing, development and training services.
- Action 1.2, regarding **sourcing of external grants funding and sponsorship**, which is a continuation of the current successful strategy through the period of this strategy.
- Action 1.3, regarding **targeted marketing management systems & processes**, which will enable community managed attractions and facilities to continue to be run with guidance from Ballyhoura Fáilte
- Action 1.4, regarding consideration of the use of an **asset management system** reflects the use of such systems elsewhere where the provision of visitor related assets requires an overview to ensure retention of quality and safety. Detail on examples of the operation of such systems is given in **Appendix 1.**

Action	Responsible Partner(s)	Timescale/Priority	Target Audience	Key Performance Indicator (KPI)
1.1 Require tourism attractions, activity providers and accommodation owners to pay quarterly subscription to Ballyhoura Fáilte for marketing development & training services. This subscription to fund key marketing support including: <ul style="list-style-type: none"> • Proactive involvement on new website • New website to connect bookers with product providers • Opportunity to participate in ongoing special offers • Ongoing cooperative marketing campaigns • Training Opportunities 	Ballyhoura Fáilte	2015-2020	Tourism businesses in Ballyhoura area	Increase percentage of Ballyhoura Fáilte running costs covered by local trade
1.2 Source external funding including: <ul style="list-style-type: none"> • Corporate and other philanthropic sponsorship • Capital grant funding from Fáilte Ireland 	Ballyhoura Fáilte IDA Fáilte Ireland	2015-2020		Range of key sponsors identified Grant funding acquired for key capital projects
1.3 Create targeted set of marketing & management systems and processes for community managed attractions and facilities.	Ballyhoura Fáilte	2015-2020	Community managed attractions and facilities	Introduction of targeted set of marketing & management systems and processes
1.4 Consider introduction of an asset management system to ensure quality and safety of Ballyhoura assets is retained.	Ballyhoura Development	2015-2016		Decision made as to whether Ballyhoura Fáilte should utilise an asset management system

Programme 2: Stakeholder Engagement – Trade, Community, Local Authority & Tourism Bodies
Rationale

The purpose for this programme is to produce actions that will drive **closer engagement between Ballyhoura Fáilte and the tourism trade**. This includes:

- Action 2.1, regarding **communication of the required minimum baseline** for each product which includes a vertical marketing cascade with each product provider connecting with the relevant trade marketing body e.g. B&B providers to connect with B&B Ireland, cycling providers with Cycling Ireland, walking route management with Irish Trails Office
- Action 2.2, regarding a **newsletter for local community & trade**, which will drive community awareness of the work Ballyhoura Fáilte is carrying out on their behalf to strengthen the tourism sector in Ballyhoura communicating progress and achievements.
- Action 2.3, regarding a representative **Community Council including Community Ambassadors** to liaise with Ballyhoura Fáilte and Ballyhoura Development to ensure a two-way communication process
- Action 2.4, also aims to increase communication, with **lobbying for a strategic policy committee** on county councils to coordinate tourism related development
- Action 2.5, regarding establishing a **working relationship with a key contact within Fáilte** to discuss key components of this action plan such as: capital grant funding opportunities (1.2), training programmes (4.1), accreditation schemes, digital marketing training, business development and training for local guides (4.2), human resources (4.3), proposed Kilmallock Medieval Experience (5.14), proposed themed touring routes, particularly the proposed Ballyhoura Tourist Route (5.15), proposed Steeplechase Festival (5.19), use of the Walkers Welcome branding (6.4), use of the Cyclists Welcome branding (6.9), promotion of the Ballyhoura Walking Festival (6.5), support for the attraction of European and World series of adventure races (6.17), un-registered accommodation (8.1), visitor information point network (10.8), brand awareness (11.1, 11.3, 11.4, 11.5), digital strategy for Ballyhoura (12.1), video content development (12.2), smartphone application development (12.3), the inclusion of Ballyhoura Country as a distinct destination within the East and South (Heritage & Culture) Destination Plan (13.1), collaborative marketing (13.2, 13.5), preparation of an Experience Development Strategy (13.3)

Action	Responsible Partner(s)	Timescale/ Priority	Target Audience	Key Performance Indicator (KPI)
2.1 Communicate desired minimum baseline for each tourism product provider to include: <ul style="list-style-type: none"> • Excellent website with motivational imagery and a bookable facility • Superb product & service • Being a member of a relevant regional and national co-operative marketing agency e.g. B&B Ireland, Heritage Island • Digital media plan using Twitter/Facebook (for which targeted training and support is provided by Ballyhoura Fáilte – see action 1.3 above) 	Ballyhoura Fáilte Accommodation sector Activity providers Attractions	2015-2020	Tourism-related businesses in Ballyhoura	Guidelines on minimum businesses operation communicated
2.2 Issue monthly or quarterly newsletter to tourism trade and local community in Ballyhoura	Ballyhoura Fáilte Accommodation sector Activity providers Attractions Local community	2015-2020	Tourism-related businesses in Ballyhoura	Monthly newsletter issued
2.3 Community Council established incorporating representative Community Ambassadors	Ballyhoura Fáilte County Councils	2015-2016	Local community	Community Council established Community Ambassadors identified
2.4 Lobby for strategic policy committee on Limerick, Tipperary and Cork County Councils	Ballyhoura Fáilte County Councils	2015-2020	County Councils	Meetings with each local authority to discuss establishments of strategic policy committee with support of local trade and community
2.5 Identify and establish working relationship with key Fáilte Ireland contact to present Ballyhoura Tourism Strategy and to discuss timescale for implementation of Ballyhoura 2020 Strategy Action Plan.	Ballyhoura Fáilte Fáilte Ireland	2015	Fáilte Ireland	Key Fáilte Ireland contact identified

Programme3: Stakeholder Engagement – Collaboration and Linkages**Rationale**

The purpose of this programme is to **increase collaboration and linkages** between businesses within, and in areas adjacent to, the Ballyhoura Country area. This includes:

- Action 3.1, regarding **B2B training & familiarisation days** for businesses within the Ballyhoura area to raise awareness amongst people working in the tourism industry of what other attractions and services are on offer in the area so they can make personal recommendations and exploit cross-selling opportunities.
- Action 3.2, regarding a **one-way baggage transfer service**, aims to enable bundling of accommodation and activities throughout the area for walkers and cyclists. This could consider options such as one-way bike drop off for cyclists. The initiative could be piloted in the area with greatest perceived demand.
- Action 3.3, regarding the **Ballyhoura Open Door** initiative with free entry to attractions and activities for the local community on a specific day to raise awareness amongst the local community as to what the area offers visitors (targeting the large VFR market) with the aim of increasing opportunities for and likelihood of cross-selling through heightened awareness of product offer.

See also Action 2.3 regarding Community Council Ambassadors and Action 5.4 regarding Ballyhoura Breakfast Initiative for other examples of collaborative measures.

Action	Responsible Partner(s)	Timescale/Priority	Target Audience	Key Performance Indicator (KPI)
3.1 Organise training and familiarisation days for tourism business providers (B2B) within the Ballyhoura Country area.	Ballyhoura Fáilte Accommodation sector Activity providers Attractions	2015-2017	Accommodation sector Activity providers Attractions	Tourism businesses able to recommend a wide range of things to do in the Ballyhoura Country area with confidence.
3.2 Pilot one way baggage transfer service between destinations & accommodation.	Ballyhoura Fáilte Accommodation sector Activity providers	2015-2016	All visitors	One way baggage/bike transfer service operational in pilot area.
3.3 Introduce local familiarisation initiative 'Ballyhoura Open Door'.	Ballyhoura Fáilte Accommodation sector Activity providers Attractions	2015-2016	Local community	Local Familiarisation Initiative underway

Programme 4: Stakeholder Engagement – Training & Development

Rationale

The aim of this programme is to **raise the quality of the tourism product offer** in Ballyhoura Country so that the **visitor experience & visitor satisfaction is enhanced** in line with expectations, **leading to repeat visits and referrals** through word of mouth and on-line recommendations e.g. via TripAdvisor. This includes:

- Action 4.1, regarding **provision of targeted training programmes and advice**, aims to raise the quality of the tourism product offer and to enable tourism related businesses within Ballyhoura to avail of relevant training on offer that would enable them to save money and increase revenue. Fáilte Ireland offers a wide range of training programmes that businesses are often not aware of & this measure will provide them with relevant information. Provision of digital marketing training, through an external service provider, for businesses within the Ballyhoura area will enable them to raise their online profile and encourage increased numbers of visitors. Provision of support for business creation and development will further develop the range and quality of tourism businesses in Ballyhoura. Provision of training programmes for guides represents a continuation of the current strategy into this new plan. Familiarisation visits for tourism businesses in the Ballyhoura Country area to Burren & Cliffs of Moher will enable businesses from Ballyhoura to learn about their collaborative approach to business development – Burren Geopark management have indicated they are happy to establish a programme for this form of familiarisation visit.
- Action 4.2, regarding **encouraging tourism business to join environmental accreditation schemes**, means businesses will reduce their costs and their negative impacts. Importantly, this will, once a critical mass of businesses has become accredited, enable the destination to be marketed as a responsible tourism destination.
- Action 4.3, regarding production of a comprehensive **human resources development strategy** for the hospitality and tourism sector in Ballyhoura will aim to ensure there are equal opportunities for access to employment, career development and capacity building. This must incorporate a structured, phased and fully integrated implementation programme.
- Action 4.4, regarding **production of a Volunteer Plan** for coordination of community volunteers will offer a means for the local community to engage in the conservation and development of the natural cultural and built heritage of the county; and for Ballyhoura Fáilte to capitalise on the desire of many people to give time.

Action	Responsible Partner(s)	Timescale/ Priority	Target Audience	Key Performance Indicator (KPI)
<p>4.1 Provision of targeted training programmes and advice.</p> <p>This includes:</p> <ul style="list-style-type: none"> Providing tourism businesses with information on relevant Fáilte Ireland training programmes Providing continued Digital Marketing Training for websites and social media Offering support for business creation and development within the Ballyhoura Country area Offering further training programmes for Ballyhoura Country Guides as well as establishing a core panel of local Ballyhoura Country Guides Familiarisation visits for tourism businesses in the Ballyhoura Country area to Burren & Cliffs of Moher to learn about their collaborative approach. 	<p>Ballyhoura Fáilte</p> <p>Fáilte Ireland</p> <p>Accommodation sector</p> <p>Activity providers</p> <p>Attractions</p> <p>External service provider (digital marketing training)</p> <p>Burren & Cliffs of Moher Geopark</p>	2015-2020	<p>Local tourism businesses</p> <p>Local Community</p>	<p>Information on available training programmes sent to targeted businesses</p> <p>Digital marketing training provided</p> <p>Support offered for business creation and development</p> <p>Local guides taking part in training programmes</p> <p>Ballyhoura Country Guides panel selected</p> <p>Familiarisation visit to the Burren & Cliffs of Moher takes place.</p>
4.2 Persuade tourism businesses to join responsible tourism accreditation scheme through education, training and support.	<p>Ballyhoura Fáilte</p> <p>Fáilte Ireland</p> <p>Green Hospitality Programme</p> <p>Green Tourism Business Scheme</p> <p>Ecotourism Ireland</p>	2015-2020	Local tourism businesses	Annual percentage increase in the proportion of attractions and accommodation with an environmental management accreditation
4.3 Produce a comprehensive human resources development strategy	<p>Ballyhoura Fáilte</p> <p>Fáilte Ireland</p>	2016-2018	Local tourism businesses	Guidelines for equal opportunities issued to local tourism businesses
4.4 Produce a Volunteer Plan	<p>Rural Recreation Officers</p> <p>Ballyhoura Fáilte</p>	2016-2018	Local community	Volunteer Plan produced

Programme 5: Product Development – Flagship Experiences**Rationale**

The purpose of this programme is to identify actions which, over the period of this strategy, will increase the volume of, and yield from, visitors to the three flagship visitor attractions of Doneraile Court & Gardens, Lough Gur and Ballyhoura Trailhead. In addition there are several proposed flagship attractions outlined below. The overall aim of this programme is to provide a coordinated response to the identified need for several flagship attractions in the area and provide a basis for targeting funding.

Doneraile Court & Gardens

The goal is to secure Doneraile's position as a regional attraction and to enable it to attract 400-500,000 visitors p.a., providing local employment and economic spin-offs for the town of Doneraile.

Actions include:

- Action 5.1, regarding the continued implementation of the current **Masterplan** which will; open up further areas of the castle interior and gardens to the public; provide more commercial opportunities; enable larger volumes of visitors to come to the castle, for example coach groups; and provide improved signage and services for visitors.
- Action 5.2, regarding the commissioning of a **feasibility study into the optimum commercial opportunities** for Doneraile Court & Gardens – investigating which would have the most revenue potential and have the best 'fit' with the environment of Doneraile Court. This includes festivals, events, bike hire and weddings. Case studies for Westport House & Gardens and Belvedere House are given in **Appendix 2**.
- Action 5.3, regarding an application for **World Heritage Site designation**, reflects the recognised heritage potential of Doneraile Court. See **Appendix 3** for more information on World Heritage Site designation.

Lough Gur

The goal is to build on the work already completed and to enable Lough Gur to attract more visitors and local revenue without impacting on those qualities which make it a special place. Actions include:

- Action 5.4, regarding the need for a **Lough Gur Masterplan**, reflects the need to coordinate the development of the area over a multi-year timeframe. The topics listed under this action are some of the management priorities however many more issues are likely to be covered by an in-depth Masterplan. Measures include: identifying opportunities to fund increase staff and volunteer numbers through grant funding, sponsorship and fees, necessary to implement plans currently in place and to operate the business including management of volunteers; a children's playground would cater for a growing family market and increase dwell time. A key focus of the Masterplan will be how to increase the revenue stream for Lough Gur Development Cooperative Society without negative impacts on the character of Lough Gur.
- Action 5.5, regarding the **implementation of the Lough Gur Masterplan**, reflects the need to assign resources to implementation.
- Action 5.6, regarding the need for an active **Lough Gur Partnership**, reflects the need for a multi agency approach to enable implementation of the Masterplan and the development of Lough Gur as an attraction of national importance. This will require 'buy-in' and support from the identified parties.
- Action 5.7, regarding **continued water quality research**, reflects the need to continue engagement with the research programme to determine water origin and water quality and required measures to improve water quality. This will require measures within the Masterplan to improve water quality over the period of the plan e.g. reduction of algal bloom through investigation into best-practice methods used elsewhere. This will enable increased watersports and greater use of Lough Gur as an angling resource, attracting increased number of visitors and revenue.
- Action 5.8, regarding an application for **World Heritage Site designation**, reflects the recognised natural and heritage potential of Lough Gur. See **Appendix 3** for more detail on World Heritage Site designation.

Ballyhoura Trailhead

Proposals for Ballyhoura Trailhead aim to raise the profile of the facility and to cater for in excess of 100-150,000 visitors p.a over the period of the plan by widening the appeal of the site to the family market. These include:

- Action 5.9, regarding the need for a **Ballyhoura Trailhead Masterplan**, reflects the need to coordinate the development of this increasingly popular attraction over a multi-year timeframe. This includes: the development of infrastructure to improve the visitor experience such as visitor facilities, parking, signage and playgrounds; the development of the trails network to ensure it is firmly established as one of the best trail networks in Europe; marketing and promotion measures to ensure the profile of the facility is raised and that the local community are more closely involved; and conservation measures to enhance the local environment including education programmes for schools and other parties.
- Action 5.10, regarding the **implementation of the Ballyhoura Trailhead Masterplan**, reflects the need to assign resources to implementation.

- Action 5.11, regarding the **Ballyhoura Trailhead Partnership** reflects the need for a multi agency approach to enable implementation of the Masterplan and the development of Ballyhoura Trailhead as an attraction of international importance. This will require 'buy-in' and support from the identified parties.
- Action 5.12, regarding the **construction of a Ballyhoura Trails Visitor Centre**, reflects the need for an amenity with integrated education facility/bike shop/bike hire facility/franchised cafe to facilitate forecast growth. This facility which is envisaged would be operated by Ballyhoura Fáilte, would provide a source of revenue generation.
- Action 5.13, regarding the commissioning of a **feasibility study into a Tree Top Adventure Park** at Ballyhoura Trailhead aims to cater for the family market and position Ballyhoura Trailhead as a multi-activity centre.

Proposed Flagship Attractions

- Action 5.14, regarding the construction of a regional medieval heritage centre, **Kilmallock Medieval Experience**, relates to an active proposal to utilise the Stone Medieval Mansion on Sarsfield Street in Kilmallock which would be completed during the lifetime of this strategy. This centre would capitalise on the unique medieval heritage of the town – and upon the medieval heritage in towns in the region such as Buttevant, Cahir, Liscarroll, Clonmel, Carrick-on-Suir, Fethard and Cashel. The content could include: high quality interpretation regarding the history of Kilmallock and recreation of the lives of the people of the town; interpretation in relation to the connection between Kilmallock and other medieval towns such as Buttevant, Cahir, Liscarroll, Clonmel, Carrick-on-Suir and Cashel; a Discover Ireland Visitor Centre; a 50 seat cafe to encourage coach tour stop offs; coach and car parking; and bike hire. The construction of such an attraction would attract much needed visitors and revenue into Kilmallock and capitalise upon its Unique Selling Point.
- Action 5.15, regarding the construction and marketing of a **Ballyhoura Tourist Trail** envisages a route from Limerick-Lough Gur – Kilmallock – Ardpatrick – Doneraile – Mallow – Cork to include appropriate branded signage and promotional material, linking towns attractions and activities in Ballyhoura and provide a compelling reason to stop in the area. (See Map 7). This route, based on the unique built heritage of the Ballyhoura area and linking to tourism hubs in Cashel, Kilkenny, Carrick-on-Suir, Clonmel and Waterford, will link the Wild Atlantic Way in Limerick to the East & South destination. The primary aim will be to encourage day-trippers and holiday makers to take an alternative route through the area, increasing dwell time and visitors/revenue into the Ballyhoura area. Once the primary Ballyhoura Tourist Trail is established the network could be extended, for example Cashel-Lough Gur-Kilmallock-Doneraile-Cork; Kilkenny-Carrick on Suir-Clonmel-Cahir-Kilmallock-Doneraile-Cork; Limerick-Lough Gur-Kilmallock-Cahir-Clonmel-Carrick on Suir-Waterford.
- Action 5.16, regarding the commissioning of a feasibility study into, and the construction of, a **Ballyhoura Greenway**, reflects an opportunity to develop a greenway along the disused rail line between Limerick City and Kilmallock via Charleville offering people living in Limerick and visitors to Limerick City and the wider Wild Atlantic Way route a means to access the heart of Ballyhoura with ease.
- Action 5.17, regarding the **Ballyhoura Downhill Cycle Route**, reflects a perceived opportunity to create a downhill mountain bike course in the Galtee Mountains, designed to the highest international standards capitalising on the proximity of the Ballyhoura Trailhead mountain bike trails.
- Action 5.18, regarding the commissioning of a **feasibility study for a Multi-purpose Indoor Event Centre**, reflects the need for more opportunities to host indoor activities within the Ballyhoura Area both to provide a facility for the local community and to encourage visitors to stay for longer.
- Action 5.19, regarding a **Ballyhoura Steeplechase Festival**, envisages an event based around the original steeplechase. The origin of the steeplechase in Ballyhoura is a unique claim to fame and a flagship festival could be based around the original course from Doneraile to Buttevant. This could attract a significant number of domestic visitors with an interest in equestrian events as well as overseas visitors. The Steeplechase Festival could be one element of a multi-day cultural festival based in Doneraile & Buttevant, raising the profile of the area.
- Action 5.20, regarding a **Tour of Ballyhoura Cycle Festival**, envisages a one day event similar to the successful Sean Kelly Tour in County Waterford. Map ?? shows an indicative route for the tour which would be refined in discussion with local cycle groups and a feasibility study examining other similar cycle events in Ireland and internationally. The aim would be to raise the profile of the area, capitalise on the growth in popularity for cycling events and to showcase the scenery and attractions of Ballyhoura.

Action	Responsible Partner(s)	Timescale/ Priority	Target Audience	Key Performance Indicator (KPI)
Flagship Experience 1: Doneraile Court and Gardens				
<p>5.1 Continue to implement the proposals contained in the Masterplan Review of Development Proposals for Doneraile Court</p> <p>This includes:</p> <ul style="list-style-type: none"> Opening the ground floor of the castle to the public Opening 17th/18th/19th Century gardens to the public Franchised restaurant in the coach house Increased capacity within the Doneraile Court Cafe to enable coach party visits Feasibility study commissioned into feasibility of using 1st/2nd floors for public/institutional use Regional visitor information centre located within Doneraile Court Increase economic connectivity with Doneraile town Support for Doneraile Farmers Market Guided garden tours of one of the country's three 16th Century gardens with trained local guides Upgrade orientation, directional and interpretative signage. Include aerial photo orientation panels based on the current brochure map Increase the integration of Doneraile Court & Gardens with the town of Doneraile through public realm enhancements around the pedestrian entrance to the attraction e.g. planting, signage and paving to highlight the entrance Current gate entrance environs upgraded to make the entrance more inviting e.g. 'Welcome to Doneraile Court & Gardens' and planting in place of the current OPW sign and outdated map 	<p>Doneraile Court & Demesne Agency Steering Group (ASG)</p> <p>(OPW, Fáilte Ireland, Cork County Council, Ballyhoura Development, Mallow Area Partnership, and the Doneraile Development Association)</p>	2015-2020	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers Family Market	Masterplan proposals implemented
<p>5.2 Commission feasibility study into optimum range of commercial opportunities, in addition to those relevant actions contained within the Doneraile Court Masterplan to increase revenue generation for Doneraile Court & Gardens. These could include:</p> <ul style="list-style-type: none"> Bike hire within Doneraile Court On-site festivals and events e.g. Santa at Doneraile, Halloween Events, food fairs, trail running and angling competitions. Use Westport House and Belvedere House & Gardens as development models. Commercial development of adjacent farmyard space to the south of the court Bus tours linked with Kilmallock and Lough Gur and on to The Vee and Waterford Feasibility study into hosting weddings at Doneraile commissioned 	<p>Doneraile Court & Demesne Agency Steering Group (ASG)</p> <p>(OPW, Fáilte Ireland, Cork County Council, Ballyhoura Development, Mallow Area Partnership, and the Doneraile Development Association)</p>	2015-2020	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers Family Market	<p>1. Feasibility study commissioned into commercial opportunities for Doneraile Court.</p> <p>2. Those commercial opportunities with significant revenue potential implemented.</p>

5.3 Apply for World Heritage Status for Doneraile Court & Gardens	Doneraile Court & Demesne Agency Steering Group (ASG) (OPW, Fáilte Ireland, Cork County Council, Ballyhoura Development, Mallow Area Partnership, and the Doneraile Development Association)	2015-2020	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers Family Market	World Heritage Site application submitted
Flagship Experience 2: Lough Gur				
5.4 Commission Lough Gur Masterplan. This includes measures such as: <ul style="list-style-type: none"> • Extension of walking trails including looped walks • Investigation of potential to acquire adjacent land to extend site boundary • Identify opportunities to fund increase staff and volunteer numbers • Increased funding for marketing activities • Construction of a children's playground • Producing bundled packages with other local businesses • Ensuring widespread distribution of Lough Gur brochures • Upgrade water quality • Develop the lake as an angling and water-sports centre including pontoons, slipway, angling stands and associated infrastructure • Enhance restaurant facilities to facilitate coach tours with 50-seat cafe • Commission interpretative panels for natural heritage • Position Lough Gur as a Discovery Centre for primary schools • Upgrade tour offering with new folklore tour, and incorporation of geography, geology and astronomy as part of the Lough Gur tours 	Lough Gur Development Co-Operative Society Ltd Ballyhoura Fáilte Limerick County Council	2015-2016	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers Family market	Lough Gur Masterplan commissioned
5.5 Implement Lough Gur Masterplan	Lough Gur Development Co-Operative Society Ltd Ballyhoura Fáilte Limerick County Council Accommodation providers Activity providers Fáilte Ireland Inland Fisheries Ireland Local angling clubs Local water-sports clubs University water-sports clubs	2015-2020	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers Family market	Lough Gur Masterplan implemented
5.6 Establish Lough Gur Partnership	Lough Gur Development Co-Operative Society Ltd	2015-2016	N/A	Lough Gur Partnership established

	Ballyhoura Fáilte Ballyhoura Development Limerick County Council Fáilte Ireland Inland Fisheries Ireland			
5.7 Continued water quality research	Lough Gur Development Co-Operative Society Ltd Limerick County Council External service provider	2015-2018	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers Anglers	Water quality improved and monitored
5.8 Apply for World Heritage Status for Lough Gur	Lough Gur Development Co-Operative Society Ltd Ballyhoura Development Limerick County Council	2015-2020	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers Family Market	World Heritage Site application submitted
Flagship Experience 3: Ballyhoura Mountain-Biking Trailhead				
5.9 Commission Ballyhoura Trailhead Masterplan This includes: <ul style="list-style-type: none"> Multi-year trail development strategy Infrastructure measures such as: increased directional road signage from the larger towns on the area such as Mitchelstown, Mallow, Kilfinane and Kilmallock; children's adventure playground to cater for family market; and a multi-access loop walk from the visitor centre car-park to cater for family market (buggy accessible) and elderly and wheelchairs; Consideration of the optimum method of car-parking payment with the view to increase the ease of access from the current gate payment system which may deter entry for some visitors e.g. pay parking. Marketing measures including bundling bike hire with local accommodation Measures to attract international events such as the European and World Championship mountain biking events 	Ballyhoura Development Coillte	2015-2016	Adventure/Activity Enthusiasts, in particular Hard and soft adventurers (cyclists) Local cycling clubs Sightseers and Culture Seekers, in particular Great Escapers	Ballyhoura Trailhead Masterplan commissioned
5.10 Implement Ballyhoura Trailhead Masterplan	Ballyhoura Fáilte Limerick County Council Fáilte Ireland Trailriders Coillte	2015-2020		Ballyhoura Trailhead Masterplan implemented
5.11 Establish Ballyhoura Trailhead Partnership	Ballyhoura Fáilte Limerick County Council Fáilte Ireland Trailriders Coillte	2015-2016		Ballyhoura Trailhead Partnership established
5.12 Construct Ballyhoura Trails Visitor Centre amenity with integrated education facility/bike shop/bike hire facility/franchised cafe to facilitate forecast growth.	Ballyhoura Fáilte Limerick County Council	2015-2017	Adventure/Activity Enthusiasts, in particular	Ballyhoura Trails Visitor Centre open

	Fáilte Ireland Trailriders Coillte		Hard and soft adventurers (cyclists) Local cycling clubs Sightseers and Culture Seekers, in particular Great Escapers	
5.13 Commission feasibility study into Tree Top Adventure Park at Ballyhoura Trailhead	Ballyhoura Fáilte External service provider Coillte	2015	All visitors	Feasibility study commissioned
Proposed Flagship Experiences				
5.14 Construct Kilmallock Medieval Experience	Ballyhoura Fáilte External service provider Fáilte Ireland Limerick County Council Tipperary County Council Cork County Council	2015-2017	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers	Kilmallock Medieval Experience visitor centre operational
5.15 Implement Ballyhoura Tourist Trail	Fáilte Ireland Ballyhoura Fáilte	2015-2018	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers	Ballyhoura Tourist Trail established and promoted
5.16 Commission feasibility study for and develop Ballyhoura Greenway	Ballyhoura Development External service provider Fáilte Ireland Limerick County Council National Trails Office	2015-2017	Adventure/Activity Enthusiasts, in particular Hard and soft adventurers (cyclists) Local cycling clubs Sightseers and Culture Seekers, in particular Great Escapers	a Feasibility study into Ballyhoura Greenway commissioned b Ballyhoura Greenway developed
5.17 Commission feasibility study into Ballyhoura Downhill Cycle Route located in the Galtee Mountains	Ballyhoura Development External service provider	2015-2016	Adventure/Activity Enthusiasts, in particular Hard and soft adventurers (cyclists) Local cycling clubs	Feasibility study into downhill cycle route commissioned. Downhill cycle route developed
5.18 Commission feasibility study into multi-purpose indoor event centre	Ballyhoura Fáilte External service provider Fáilte Ireland Limerick County Council	2016-2018	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers	Feasibility study commissioned into multi-purpose indoor event centre
5.19 Investigate opportunity to establish Ballyhoura Steeplechase Festival	Ballyhoura Fáilte Fáilte Ireland Local equestrian clubs	2016-2018	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers	Flagship annual steeplechase festival event established

5.20 Commission feasibility study into a Tour of Ballyhoura one day cycling festival event.	Ballyhoura Fáilte Fáilte Ireland Local cycling clubs	2015-2018	Adventure/Activity Enthusiasts, in particular Hard and soft adventurers (cyclists) Local cycling clubs Sightseers and Culture Seekers, in particular Great Escapers	Tour of Ballyhoura cycling event established.
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Map 4: Proposed Long Distance Cycle Routes



Programme 6: Product Development - Recreation**Rationale**

The aims of this programme, targeted towards recreation opportunities, are: to drive an increase in the volume of visitors using Ballyhoura Country's recreational resources; to increase yield from those visitors; and to increase experiential satisfaction levels amongst these visitors. In this regard, and reflecting the quality of the existing resource, the proposed actions relate both to planned product and infrastructure development, as well as to enhancement and promotion of existing resources to improve access and enjoyment.

The focus is on those sectors perceived to offer the greatest potential in increasing visitor numbers and revenue. This includes walking, cycling, angling, equestrian and adventure races.

Walking

- Action 6.1, regarding production of a **Ballyhoura Walking Trails Map**, reflects the need to provide visitors with clear information on the available trails within the Ballyhoura area. This will also help reinforce the perception of the boundary of the Ballyhoura area, helping to retain visitors for longer.
- Action 6.2, regarding **standardised downloadable route maps**, reflects the growing demand for high quality maps which can be linked to a GPS signal. While some maps, produced by the Irish Trails Office, are available on the Visit Ballyhoura website, these are not available for all walks and there is no standard approach to the provision of trail maps in the Ballyhoura area. Examples of walking route maps are shown in **Appendix 4**.
- Action 6.3, regarding **multi-access walks**, reflects the international growth in provision of multi access trails enabling access to trails by the young, old, those with disabilities, parents with buggies etc. This will help to widen the appeal of the walking product offer in Ballyhoura.
- Action 6.4, regarding the promotion of the **Walkers Welcome branding**, particularly in the accommodation sector, aims to widen the appeal of the Ballyhoura Country as a destination for walkers.
- Action 6.5, regarding maximising the potential of the **Ballyhoura Walking Festival**, reflects the need to upgrade the festival proposition to increase its relevance and appeal. There are now many other walking festivals nationally and internationally and Ballyhoura Walking Festival has lost its position as a market leader. **Appendix 5** considers some ways in which other walking festivals have engaged visitors and suggests some relevant best practice.
- Action 6.6, regarding a feasibility study into the **extension of existing walking/cycling trails** within Ballyhoura to link with walking/cycling trails in neighbouring counties, aims to capitalise on work that has been done to create walking and cycling trails in neighbouring counties and to consider options for extending walking & cycle trails into multi-county trails. This would offer visitors an array of walking/cycling trails and help retain visitors within the area for longer.

Cycling

- Action 6.7, regarding an overall **map of recommended cycling trails** within the Ballyhoura Country boundary for use in print media and download reflects the need to provide visitors with clear information on the available trails within the Ballyhoura area. This will also help reinforce the perception of the boundary of the Ballyhoura area, helping to retain visitors for longer.
- Action 6.8, regarding provision of **increased bike racks** at visitor attractions within the Ballyhoura Country area aims to increase the perception of Ballyhoura as a welcoming place for cyclists and to reduce opportunities for the theft of visitors' bikes.
- Action 6.9, regarding the promotion of the use of **Cyclists Welcome** branding in the accommodation sector within the Ballyhoura Country boundary aims to widen the appeal of Ballyhoura as a destination for cyclists.
- Action 6.10, regarding **maximising linkages between accommodation and activity providers** reflects a perceived lack of information on the available activities on many hotel and B&B websites in the Ballyhoura area. Accommodation providers could benefit from extended stays and activity providers from increased business.

Angling

- Action 6.11, regarding the **expansion and promotion of angling opportunities** within the Ballyhoura area reflects the existing opportunities on the Blackwater and Shannon Rivers as well as places with potential for growth, subject to an improvement in water quality such as Lough Gur. In addition there are opportunities for angling at the rivers Awbeg, Funcheon, Aherlow, Maigue, Loobagh, Morning Star and Camogue. Catch includes salmon, brown trout and coarse including rudd, bream, perch, roach, pike and eel. Lough Gur is also a popular place for fishing. The visitor may also fish for rainbow trout at Griston Bog, Ballyanders. This measure envisages installation of new infrastructure and upgrading of existing angling related infrastructure in targeted areas. It is envisaged that an infrastructure development programme would be prepared in conjunction with Inland Fisheries Ireland regarding areas with the most potential for attracting significant numbers of anglers.

Equestrian

- Action 6.12, regarding the commissioning of an **overall map of Ballyhoura equestrian centres and trekking routes**, aims to provide visitors with clear information as to the location of equestrian opportunities and to increase visitor participation and revenue from this sector.
- Action 6.13, regarding the promotion of **multi-day horse treks and offer bundled packages** of transport, accommodation and hire of horses, aims to connect visitors with equestrian opportunities and drive the growth of this sector.
- Action 6.14, regarding the expansion of the potential of the Ballyhoura equestrian product, aims to capitalise on successful examples from other countries that are considered transferable to Ballyhoura. Examples of relevant best practice are included in **Appendix 6**.

Canoe/kayak

- Action 6.15, regarding the commissioning of route identification and mapping of Blue Way kayak trails in Ballyhoura, reflects a trend for the development of such trails elsewhere in the country, and for a desire for increasingly wild and adventurous activities among visitors. Ideal locations could be the Blackwater River and Lough Gur. It would also be important to highlight those locations where kayaks & canoes can be hired. The overall aims are: to increase visitor dwell time, offer visitors a wider variety of activity experiences, and increase revenue to the destination.

Adventure Races

- Action 6.16, regarding the **evolution of the Beast of Ballyhoura Adventure Race**, reflects the evident potential of this race which could be developed from the current 2 day event to a 3-4 day event. Best practice examples from elsewhere are discussed in **Appendix 7 along with details of professional race planners**. The aim would be to attract increasing numbers of participants, and to increase the profile of the event, thus increasing visitor revenue to Ballyhoura.
- Action 6.17, regarding the **attraction of the European Adventure Race Final in 2015 and World Final in 2016**, reflects the potential of this race to become an international event, attracting increasing numbers of visitors and revenue to Ballyhoura.

Action	Responsible Partner(s)	Timescale /Priority	Target Audience	Key Performance Indicator (KPI)
Walking Product Enhancement Initiative				
6.1 Commission overall map of walking trails	Ballyhoura Fáilte National Trails Office	2015- 2016	Adventure/Activity Enthusiasts, in particular Hard and soft adventurers (walkers) Sightseers and Culture Seekers, in particular Great Escapers	Map of Ballyhoura Country walking trails available to the public in print format and for download.
6.2 Commission standardised downloadable route maps for all walking trails	Ballyhoura Fáilte National Trails Office	2015- 2016	Adventure/Activity Enthusiasts, in particular Hard and soft adventurers (walkers) Sightseers and Culture Seekers, in particular Great Escapers	Route maps of Ballyhoura Country walking trails available to the public for download from website or for use via an app.
6.3 Identify location of multi-access walks and increase quantity of such walks annually.	Ballyhoura Development National Trails Office	2015- 2020	Walkers with reduced mobility and others who require multi-access trails	Identification of existing and development of new multi-access trails.
6.4 Promote use of the Walkers Welcome branding in the accommodation sector	Ballyhoura Fáilte Fáilte Ireland	2015- 2016	Adventure/Activity Enthusiasts, in particular Hard and soft adventurers (walkers) Sightseers and Culture Seekers, in particular Great Escapers Accommodation sector	Percentage of accommodation sector engaged in Walkers Welcome scheme increased.
6.5 Maximise the potential of the Ballyhoura Walking Festival	Ballyhoura Fáilte Fáilte Ireland	2015- 2020	Adventure/Activity Enthusiasts, in particular Hard and soft adventurers (walkers) Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers	Continued promotion of the Ballyhoura Walking Festival Linkages developed with other proximate walking festivals

6.6 Carry out feasibility study into extension of existing walking/cycling trails within Ballyhoura to link with walking/cycling trails in neighbouring counties.	Ballyhoura Fáilte Great Southern Mountain Park Steering Group Kerry County Council Limerick County Council Tipperary County Council Cork County Council	2016- 2020	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers Adventure/Activity Enthusiasts, in particular Hard & Soft adventurers	Feasibility study into walking/cycling trail extensions commissioned
For walking related signage see Programme 11				
Cycling Product Enhancement Initiative				
6.7 Commission overall map of recommended cycling trails	Ballyhoura Fáilte Local cycling clubs	2015- 2016	Adventure/Activity Enthusiasts, in particular Hard and soft adventurers (cyclists) Local cycling clubs Sightseers and Culture Seekers, in particular Great Escapers	Map of Ballyhoura Country cycling trails available to the public in print format and for download.
6.8 Investigate options to provide increased bike racks at visitor attractions	Ballyhoura Development OPW	2015- 2016	All visitors	Increased bike rack provision at visitor attractions
6.9 Promote use of the Cyclists Welcome branding in the accommodation sector	Ballyhoura Fáilte Fáilte Ireland	2015- 2016	Adventure/Activity Enthusiasts, in particular Hard and soft adventurers (cyclists) Local cycling clubs Sightseers and Culture Seekers, in particular Great Escapers Accommodation sector	Percentage of accommodation sector engaged in Cyclists Welcome scheme increased.
6.10 Increase linkages between accommodation and other local activity providers	Ballyhoura Fáilte Accommodation providers Bike hire companies	2015- 2016	Adventure/Activity Enthusiasts, in particular Hard and soft adventurers (cyclists) Local cycling clubs Sightseers and Culture Seekers, in particular Great Escapers Accommodation sector	1. Increased number of hotel and B&B websites with cycling information and maps. 2. Increased number of cycling & Accommodation bundles on offer
For cycling related signage see Programme 11				
Angling Product Enhancement Initiative				
6.11 Progressively expand and promote angling opportunities within the Ballyhoura area	Ballyhoura Development/Fáilte Inland Fisheries Ireland Local angling clubs	2015- 2017	Adventure/Activity Enthusiasts, in particular Soft adventurers (angling) – overseas and domestic	Improved access to key identified angling locations

For angling related signage see Programme 11				
Equestrian Product Enhancement Initiative				
6.12 Commission overall map of Ballyhoura equestrian centres and trekking routes.	Ballyhoura Fáilte Local equestrian centres	2015	Adventure/Activity Enthusiasts, in particular Soft adventurers (equestrian) – overseas and domestic Sightseers and Culture Seekers, in particular Great Escapers	Horse-riding route maps available for download from websites.
6.13 Promote multi-day horse treks and offer bundled packages of transport, accommodation and hire of horses	Ballyhoura Fáilte Local equestrian centres	2015-2016	Adventure/Activity Enthusiasts, in particular Soft adventurers (equestrian) – overseas and domestic Sightseers and Culture Seekers, in particular Great Escapers	Multi-day horse riding trails developed Increased numbers of visitors undertaking equestrian activities in the area.
6.14 Expand potential of Ballyhoura equestrian product offer using identified best-practice examples.	Ballyhoura Fáilte Local equestrian centres	2015-2016	Adventure/Activity Enthusiasts, in particular Soft adventurers (equestrian) – overseas and domestic Sightseers and Culture Seekers, in particular Great Escapers	Increased numbers of visitors undertaking equestrian activities in the area.
Canoe & Kayak Product Enhancement Initiative				
6.15 Identify, map and promote a network of Blue Way kayak trails and canoe/kayak hire opportunities	Ballyhoura Fáilte Local canoe and kayak clubs	2015-2016	Adventure/Activity Enthusiasts, in particular Soft/hard adventurers (canoe & kayak) – overseas and domestic Sightseers and Culture Seekers, in particular Great Escapers Social Energisers	Network of Blue Way trails & canoe/kayak hire locations identified and promoted
Adventure Races				
6.16 Capitalise on the potential of the Beast of Ballyhoura Adventure race and develop the event to become international standard	Ballyhoura Fáilte	2015-2016	Adventure race participants	Beast of Ballyhoura event extended and evolved.
6.17 Attract European Adventure Race Final in 2015 and World Final in 2016	Ballyhoura Fáilte Fáilte Ireland Tourism Ireland	2015-2017	Adventure race participants	Strong buy-in and support from Fáilte Ireland and Tourism Ireland in attracting these races in terms of on the ground support and marketing.

Programme 7: Product Development - Heritage**Rationale**

The aims of this programme, targeted towards built, cultural and natural heritage, are to: increase the **variety and quality** of the product offer; **increase awareness** of what can be seen and done in the area; **improve accessibility** of the heritage offer; **protect and conserve the heritage** of Ballyhoura; and **enhance and promote** the heritage offer of Ballyhoura with the goal of enhancing visitor satisfaction, increasing visitor dwell time and boosting visitor revenue yield, thereby **increasing local economic return from heritage based tourism**.

Built Heritage

- Action 7.1, regarding targeted development work to maximise the tourism potential of built heritage, is a continuation of work undertaken under the current strategy through the lifetime of this strategy. The aims are: to continually upgrade the heritage product offer; to use tourism as a vehicle for conservation; and, to attract increased numbers of visitors with an interest in architectural heritage.
- Action 7.2, regarding community engagement in built heritage development, aims to engage the local community in developing ideas for the reuse of derelict buildings with potential for redevelopment. The aim of this measure is to rejuvenate rundown urban areas and to bring life to communities so creating a more welcoming receiving environment and encouraging visitors to stay in the area longer.

Cultural Heritage

- Action 7.3, regarding the inclusion of **cultural heritage detail on overall visitor map** of the Ballyhoura Country area aims to engage visitors to Ballyhoura with the distinctive culture of the area, improving their experience.
- Action 7.4, regarding **maximising the tourism potential of the food sector in Ballyhoura**, includes a range of actions designed to engage visitors and to drive revenue for this sector. This includes such measures as: launching a Made in Ballyhoura label, and a Ballyhoura Breakfast label; establishing a Kilmallock Food Festival; working with food producers and accommodation providers to increase the amount of local produce used; and working with Bord Bia on co-promotion of the Origin Green food label.
- Action 7.5, regarding a **Ballyhoura Food Trail and a 'Made in Ballyhoura' arts & crafts trail**, builds on the success of similar trails elsewhere, such as those operated by Trail Kilkenny. This initiative will require building the capacity of food, arts and craft producers to cater for visitors on site. This could also include the promotion of a cycling food trail option with bike hire and map provision in accommodation centres and visitor centres.
- Action 7.6, regarding the **Reaching Out Programme and Historic Graveyards** project, aims to capitalise on this high potential sector and to continue existing work in this area.
- Action 7.7, regarding support **for local initiatives to capitalise on national marketing drives associated with the 'decade of centenaries'**, reflects the tourism potential of this period and should include investigation of how similar events have been celebrated worldwide and consider transferable innovative marketing methods.
- Action 7.8, regarding **maximising the tourism potential of rural pubs** includes promotion of night-time music/entertainment in pubs, linking rambling house sessions into a cohesive product offer to extend night time entertainment options. This requires: details to be available to visitors on opening times and dates; communicating minimum equipment requirements for licensed premises in terms of provision of food to encourage increased quality food offer in rural pubs in Ballyhoura; and new initiatives to link rural pubs e.g. Good Ballyhoura Pub Food Guide.

Natural Heritage

- Action 7.9 regarding the identification and promotion of **wildlife walks** in Ballyhoura, seeks to provide additional outdoor activities for visitors, local residents and schools, based on the varied natural flora & fauna of Ballyhoura.
- Action 7.10, regarding provision of information regarding **Coillte Forest Recreation Sites** on the overall visitor map of the Ballyhoura Country area, aims to provide visitors with information on an increased range of things to see and do in the area, thus increasing visitor dwell time, revenue from visitors and providing an enhanced visitor experience.
- Action 7.11, regarding launch and promotion of a **Ballyhoura Gardens Trail**, aims to provide visitors with an increased range of things to see & do in the Ballyhoura area.

Action	Responsible Partner(s)	Timescale /Priority	Target Audience	Key Performance Indicator (KPI)
Built Heritage				
<p>7.1 Maximise the tourism potential of built heritage within the Ballyhoura area through targeted development work.</p> <p>This includes:</p> <ul style="list-style-type: none"> Identify opportunities to link significant built heritage to walking and cycle trails Upgrade tourism potential of mediaeval built heritage through targeted infrastructure development Include built heritage details on overall visitor map of the Ballyhoura Country area Introduce towns and villages re-painting programme in selected villages to create distinctive streetscapes Support implementation of tourism related components of the Kilmallock Walled Town Public Realm Plan e.g. West Wall Trail and improvements to the environs of Kings Castle including development of heritage/visitor centre (see 5.14) Prioritise shortlist of places for which a Village Design Statement is required. Identify opportunities for suitable outdoor refreshment opportunities e.g. plazas and cafes, in towns and villages within the study area. Upgrade these areas through targeted intervention where possible. 	Ballyhoura Development OPW Corporate Sponsorship Limerick & Cork County Councils	2015-2020	Sightseers and Culture Seekers, in particular Culturally Curious All visitors	Proposals developed for built heritage attractions in the Ballyhoura Country area
<p>7.2 Maximise tourism potential of built heritage through community engagement.</p> <p>This includes:</p> <ul style="list-style-type: none"> Working with Tidy Towns Committees to identify significant local projects that could rejuvenate and improve the character of their towns. Prioritise these projects in terms of impact and achievability. Invite ideas from the community for re-use of redundant public buildings with a prize for the most innovative suggestions 	Ballyhoura Development Tidy Towns Committees Local community	2015-2016	Adventure/Activity Enthusiasts, in particular Soft Adventurers Sightseers and Culture Seekers, in particular Great Escapers	Opportunities identified to maximise tourism potential of built heritage
Cultural Heritage				
7.3 Include cultural heritage details on overall visitor map of the Ballyhoura Country area	Ballyhoura Fáilte	2015-2016	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers	Cultural heritage detail included on Ballyhoura Country visitor map
<p>7.4 Maximise tourism potential of food sector in Ballyhoura</p> <p>This includes:</p> <ul style="list-style-type: none"> Investigate opportunity to establish a 'Made in Ballyhoura' provenance label Work with accommodation sector and food providers to establish 'Ballyhoura Breakfast' label with increasing numbers of accommodation providers offering this Establish the Kilmallock Food Festival in May to coincide with the Ballyhoura Walking Festival Provide visitors with a distinctive local experience by increasing linkages between food producers and accommodation providers through the stocking and use of local food on 	Ballyhoura Fáilte Bord Bia Fáilte Ireland Artisan food and drink providers Accommodation providers	2015-2020	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers	Increased revenue to food sector in the Ballyhoura region. Increased visitor awareness of Ballyhoura food products

<p>menus and marketing</p> <ul style="list-style-type: none"> Capitalise on Origin Green promotion 				
<p>7.5 Develop series of trails around cultural heritage, such as a Ballyhoura Food Trail and a 'Made in Ballyhoura' Art & Crafts Trail</p> <p>This includes</p> <ul style="list-style-type: none"> Building capacity of food, arts and craft producers to cater for visitors on site. Promotion of a cycling food trail option with bike hire and map provision in accommodation centres and visitor centres. 	Ballyhoura Fáilte Food, Artisan art and craft providers	2015-2020	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers	Food & Craft trails developed
7.6 Continue to develop the Reaching Out Programme and Historic Graveyards project to capitalise on this high potential sector	Ballyhoura Fáilte	2015-2020	Sightseers and Culture Seekers, in particular Culturally Curious	Increased participation and interest in the initiative
7.7 Support local initiatives to capitalise on national marketing drives associated with the 'decade of centenaries'.	Ballyhoura Fáilte	2015-2016	Sightseers and Culture Seekers, in particular Culturally Curious	Local initiatives created around the theme of a 'decade of centenaries'
<p>7.8 Maximise tourism potential of rural pubs</p> <p>This includes measures to:</p> <ul style="list-style-type: none"> promote of night-time music/entertainment in pubs, link rambling house sessions into a cohesive product offer to extend night time entertainment options, provide details for visitors on opening times and dates, Communicate minimum equipment requirements for licensed premises in terms of provision of food to encourage increased quality food offer in rural pubs in Ballyhoura; Initiatives to link rural pubs e.g. Good Ballyhoura Pub Food Guide. 	Ballyhoura Fáilte Pubs and bars Fáilte Ireland Bord Bia	2015-2016	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers	<p>Traditional music promoted where it takes place on a regular basis</p> <p>Information provided to pubs on minimum requirements for food provision</p> <p>More pub lunches available</p> <p>Good pub food guide developed</p>
See also action 9.1 regarding which includes a measure to produce YouTube videos of main food, craft and art businesses for promotional use on websites				
Natural Heritage				
7.9 Identify and promote nature walks and wildlife viewing opportunities within the Ballyhoura Country area through provision of signage and inclusion of detail on visitor maps	Ballyhoura Fáilte NPWS	2015-2016	Sightseers and Culture Seekers, in particular Great Escapers Nature Lovers Students	Wildlife viewing opportunities and key nature walks identified.
7.10 Provide information regarding Coillte Forest Recreation Sites on the overall visitor map of the Ballyhoura Country area	Ballyhoura Fáilte Coillte	2015-2016	Sightseers and Culture Seekers, in particular Great Escapers Nature Lovers Students	Forest Recreation Sites identified on overall Ballyhoura visitor map
7.11 Develop Ballyhoura Gardens Trail and promote to visitors.	Ballyhoura Fáilte Fáilte Ireland Garden owners	2015-2017	Sightseers and Culture Seekers, in particular Culturally Curious Nature Lovers Great Escapers	Ballyhoura Gardens Trail developed.

Programme 8: Product Development - Accommodation**Rationale**

The aims of this programme are to: increase the **quality of the visitor accommodation product in Ballyhoura**; increase the number of businesses registered with Fáilte Ireland; enhance the spatial location of the accommodation product; develop bundled options with activity and transport providers; and increase collaboration between the accommodation sector and activity providers, other accommodation providers, food and drink providers, and local attractions. The overall goal is to increase visitor satisfaction and overnight visitor volume/yield thereby generating increased revenue for accommodation providers. Actions include:

- Action 8.1, regarding encouraging **greater participation in registration schemes for unregistered accommodation**, addresses the current issue of many unregistered accommodation businesses in Ballyhoura. This is an issue in many other places and Fáilte Ireland may be able to provide some guidance on how this can be addressed.
- Action 8.2, regarding **encouraging new accommodation to locate** where there are gaps in order to increase the clustering effect, envisages Ballyhoura Development working with Limerick and Cork County Councils to advise on which areas would most suit new visitor accommodation to ensure product matches demand.
- Action 3.3, regarding provision of information to activity providers and attractions regarding the **50-bed Ballyhoura Hostel in Kilfinnane** to facilitate packages and bundling options, aims to capitalise on the investment in developing this hostel that widens the range of visitor accommodation offer in Ballyhoura.

Action	Responsible Partner(s)	Timescale/Priority	Target Audience	Key Performance Indicator (KPI)
8.1 Encourage greater participation in registration schemes for unregistered accommodation	Ballyhoura Fáilte Fáilte Ireland	2015-2020	Unregistered accommodation sector	Decreased numbers of unregistered accommodation providers
8.2 Work with Limerick and Cork County Councils to encourage new accommodation to locate where there are gaps to increase clustering effect	Ballyhoura Fáilte Limerick and Cork County Councils	2015-2020	All visitors	Opportunities for clustering identified
8.3 Provide information to activity providers and attractions regarding 50-bed Ballyhoura Hostel in Kilfinnane to facilitate packages and bundling options	Ballyhoura Fáilte Activity providers Attractions Ballyhoura Hostel	2015-2020	All visitors	Provision of information regarding Ballyhoura Hostel to activity providers and attractions

See also the following proposed actions which relate to the accommodation sector:

- 2.1 Minimum baseline for each tourism product
- 3.1 Training and familiarisation days for tourism businesses
- 3.2 Provision of one-way baggage drop-off service
- 3.3 'Ballyhoura Open Door' local familiarisation initiative
- 4.2 Responsible tourism accreditation
- 4.3 Human resources development strategy
- 5.4, 5.9 in relation to Walkers Welcome and Cyclists Welcome signage
- 6.10 Developing linkages between accommodation and activity providers
- 7.4 Introduction of 'Ballyhoura Breakfast' label and increasing linkages between food producers and accommodation providers through the stocking and use of local food on menus and marketing
- 7.5 Cycle food trail with bike hire and map provision
- 9.2 Development of sustainable transport options between accommodation providers and providers and hubs including mountain trailheads
- 10.1 inclusion of accommodation detail on new visitor map
- 11.6 Familiarisation and learning visits to Burren & Cliffs of Moher Geopark to learn about their approach to collaboration and co-opetition
- 12.1 Development of bundling options for visitors

Programme 9: Visitor Experience: Access, Orientation & Signage
Rationale

The aims of this programme are: to improve access to, and awareness of, Ballyhoura as a destination; and to increase visitor satisfaction and dwell time. In turn, meeting these aims will lead to increased visitor revenue and yield benefiting local communities and businesses based on tourism. Actions include:

- Action 9.1, regarding **upgrading visitor infrastructure**, includes measures relating to signage, trailheads, visitor facilities at viewpoints and picnic site opportunities. The aim of these measures is to improve the visitor experience and increase dwell time in the area.
- Action 9.2, regarding **improvement of visitor access opportunities**, relates to: the introduction of Mountaineering Ireland's Mountain Access Project in the Ballyhoura Country area; the commissioning of an accessibility audit to drive increased accessibility at visitor attractions; and the commissioning of a study to investigate the optimum sustainable means of transferring people between accommodation providers and hubs within the Ballyhoura Country area, including mountain trailheads. The aim is to enable increased numbers of visitors to access the largest range of places in Ballyhoura safely and without negative impacts on the local environment.
- Action 9.3, regarding **implementation of the Slieve Felim Recreation Strategy**, reflects a focus on connecting the urban centre of Limerick to the surrounding countryside and Ballyhoura as a destination.

Action	Responsible Partner(s)	Timescale/ Priority	Target Audience	Key Performance Indicator (KPI)
9.1 Upgrade visitor infrastructure This includes: <ul style="list-style-type: none"> • Implement Ballyhoura Signage Strategy • Prioritise trailheads for upgrading including car-parks, signage and toilets • Upgrade visitor facilities at key viewpoints • Provide picnic site opportunities in optimum locations along transport corridors based on the Discovery Sites concept. 	Ballyhoura Fáilte National Trails Office Limerick County Council Cork County Council Coillte Key Sponsor	2015-2020	All visitors	Visitor infrastructure upgraded
9.2 Improve visitor access opportunities This includes: <ul style="list-style-type: none"> • Investigate opportunities to introduce Mountain Access Project in the Ballyhoura Country area • Commission accessibility audit and drive increased accessibility at visitor attractions where possible • Investigate the optimum sustainable means of transferring people between accommodation providers and hubs within the Ballyhoura Country area including mountain trailheads 	Ballyhoura Fáilte Limerick County Council Cork County Council Coillte Mountaineering Ireland National Trails Office Irish Wheelchair Association Rural Transport providers Bus Eireann	2015-2018	Adventure/Activity Enthusiasts, in particular Hard & Soft adventurers Sightseers and Culture Seekers, in particular Great Escapers	Visitor access opportunities improved
9.3 Implement the Slieve Felim Recreation Strategy with a focus on connecting the urban centre of Limerick to the surrounding countryside and Ballyhoura destination	Ballyhoura Fáilte Limerick County Council	2015-2020	Adventure/Activity Enthusiasts, in particular Hard and soft adventurers (walkers) Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers	Implementation of the Slieve Felim Recreation Strategy

Programme 10: Visitor Experience: Information & Education**Rationale**

The aims for this programme are: to improve visitor awareness and experience through the provision of high quality information and education programmes; and to increase and improve ticketing options and information on family activities. The overall goal, through increased awareness of opportunities, is to increase visitor dwell time and revenue for businesses based on tourism.

- Action 10.1, regarding commissioning of an external service provider to design, print and distribute a **Ballyhoura Country visitor map**, aims to provide visitors with information on things to see and do within the Ballyhoura area, retaining them in the area for longer and spending more. It is envisaged that this map would be available in print, digitised and interactive version for use online. The map will include detail on: Accommodation, Activity providers, Food, craft, art, Walking cycling and equestrian trails, Bike, horse and kayak hire, Driving trails, Visitor information centres, Heritage centres and Festivals & events.
- Action 10.2, regarding the **bundling of visitor tickets to multiple attractions** within Ballyhoura, would encourage visitors to one attraction to visit another and would be offered by defined flagship attractions e.g. Lough Gur, Ballyhoura Trailhead, Doneraile Court (once it opens to the public), and Kilmallock Medieval Experience (once opened).
- Action 10.3, regarding providing visitors with **information on all-family combination experiences**, will widen the appeal of Ballyhoura and tap into the trend towards multi-generational activity.
- Action 10.4, regarding the installation of Ballyhoura Country **branded information racks** for use in tourism related businesses, is designed to increase the profile of tourism businesses in Ballyhoura and to reinforce the Ballyhoura brand. (Target 20-25 businesses for participation.)
- Action 10.5, regarding the inclusion of **Leave No Trace principles** on promotional material, apps & signage, aims to reduce the environmental impact of visitors. Details can be found in **Appendix 8**.
- Action 10.6, regarding the provision of **education programmes** in conjunction with key heritage attractions, represents a continuation of current strategy and focuses on Griston Bog (education centre developed), Doneraile Court (education centre awaiting approval), Lough Gur (education centre awaiting approval), and Ballyhoura Trailhead (education centre yet to be constructed in the new visitor centre). The goals of this measure are: to widen the appeal of Ballyhoura as a destination; to provide more things to see & do; and to increase visitor engagement.
- Action 10.8, regarding the expansion of the **visitor information point network**, envisages 20 locations around the circumference of the Ballyhoura area (consisting of brochure racks and familiarisation visits to key Ballyhoura attractions for front-line staff). The goals of this action are: to increase visitor awareness of Ballyhoura attractions, and to encourage people to spend more time & money in the area.

Action	Responsible Partner(s)	Timescale/Priority	Target Audience	Key Performance Indicator (KPI)
10.1 Design, print and distribute a Ballyhoura Country visitor map.	Appointed external marketing agency Ballyhoura Fáilte OPW Coillte NPWS Local community	2015	All visitors	Visitor map developed and widely available both in print version and for download online from Ballyhoura Fáilte website, www.discoverireland.com and individual tourism businesses
10.2 Investigate feasibility of offering visitor focused tickets for multiple attractions.	Ballyhoura Fáilte Lough Gur OPW Trailriders	2015	All visitors	Combined entry tickets available for visitors
10.3 Provide visitors with detail of all-family combination experiences that will appeal to a wider audience	Ballyhoura Fáilte Fáilte Ireland	2015-2017	Family market, particularly domestic	Visitor information with regard to combination experiences developed.

10.4 Develop Ballyhoura Country branded information racks for use in tourism related businesses (Target 20-25 businesses for participation.)	Appointed external marketing agency Ballyhoura Fáilte County Councils Accommodation providers Attractions Activity providers	2015-2016	All visitors	Branded information racks available in accommodation and attractions
10.5 Include Leave No Trace principles on promotional material, apps and signage	Ballyhoura Fáilte Leave No Trace	2015	Adventure/Activity Enthusiasts, in particular Hard & Soft adventure Sightseers and Culture Seekers, in particular Great Escapers	Leave No Trace principles incorporated in promotional material, apps and signage
10.7 Develop education programmes in conjunction with key heritage attractions	Ballyhoura Fáilte Ballyhoura Fáilte Key heritage attractions NPWS Coillte	2015-2016	Primary, secondary and tertiary students Sightseers and Culture Seekers, in particular Culturally Curious	Education material developed
10.8 Expand visitor information point network to include 20 locations around the circumference of the Ballyhoura area	Ballyhoura Fáilte Fáilte Ireland	2015-2016	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers	Visitor information point network developed
See also the following proposed actions which relate to this programme: 5.12 Proposed educational and visitor centre at the Ballyhoura trail head				

Programme 11: Marketing & Promotion – Brand Awareness & Narration**Rationale**

The aim of this programme is to build on the work that has been completed to date in the promotion of Ballyhoura as a destination and to kick-start a new phase with targeted marketing to raise national and international awareness of the Ballyhoura brand thus driving increased visits. This includes:

- Action 11.1, regarding the commissioning of **focussed targeted outdoor advertising, radio and TV advertising** in key target markets including iconic experiences, aims to raise the profile of Ballyhoura as a multi-faceted adventure & heritage destination.
- Action 11.2, regarding **the targeting of large Dublin based corporations** with bundled outdoor activity options, is aimed at the large, young, active workforces of businesses such as Google, Facebook, Twitter etc seeking weekend recreation opportunities, driving visitor numbers and word of mouth recommendation.
- Action 11.3, regarding **familiarisation trips** for recreation organisations and media within Ballyhoura, is an extension of existing strategy and seeks to raise the profile of Ballyhoura as a destination with increased trade awareness and well-placed articles.
- Action 11.4, regarding an increase of **tourism product inventory on tour operator and online travel agent sites**, again seeks to raise the profile of Ballyhoura as a destination and increase visitor numbers.
- Action 11.5, regarding attending selected **trade workshops, in market consumer events and trade shows** in Ireland based on identified target markets, is an extension of existing strategy and seeks to raise the profile of Ballyhoura as a destination.
- Action 11.6, regarding **fieldtrips for Ballyhoura trade with key destinations** such as Burren & Cliffs of Moher Geopark and Trail Kilkenny to learn from their experiences, is viewed a two-way process that would benefit both destinations.

Action	Responsible Partner(s)	Timescale/ Priority	Target Audience	Key Performance Indicator (KPI)
11.1 Commission focussed targeted outdoor advertising, radio and TV advertising in key target markets including iconic experiences.	Appointed external marketing agency Ballyhoura Fáilte Fáilte Ireland Tourism Ireland	2015-2020	All visitors	Large scale advertising programme undertaken
11.2 Target large Dublin-based corporations such as Google, Facebook, Twitter etc with large, young, active workforces who are seeking weekend recreation options	Ballyhoura Fáilte	2015-2020	Footloose Socialisers within Domestic Overnight segment	Relationship established with large corporations
11.3 Continue familiarisation trips for recreation organisations and media within Ballyhoura	Fáilte Ireland Ballyhoura Fáilte	2015-2020	Walking, cycling and angling groups in the island of Ireland, UK, Germany, France and Netherlands. Targeted media	Familiarisation trips undertaken by recreation groups and media
11.4 Increase tourism product inventory featured on tour operator and online travel agent sites	Appointed external marketing agency Fáilte Ireland	2015-2020	All visitors	Tourism product inventory increased on www.discoverireland.com
11.5 Prioritise and attend selected trade workshops, in market consumer events and trade shows in Ireland based on identified target markets.	Ballyhoura Fáilte Fáilte Ireland	2015-2020	All visitors	In-market consumer events and trade shows/workshops attended
11.6 Arrange fieldtrips for Ballyhoura trade with key destinations such as Burren & Cliffs of Moher Geopark and Trail Kilkenny to learn from their experiences	Ballyhoura Fáilte Burren & Cliffs of Moher Geopark Trail Kilkenny	2015-2016		Meeting with key destinations in Ireland to share best-practice and lessons learnt

Programme 12: Marketing & Promotion – Digital Marketing & Social Media**Rationale**

The aims of this programme are: to review the current focus of Ballyhoura in terms of the constantly changing and closely competitive area of digital marketing and social media; and to ensure the optimum approach is taken. This includes:

- Action 12.1, regarding the commissioning of a **digital strategy** for Ballyhoura Country, envisages an external service provider undertaking a key section of work in relation to the future direction of Ballyhoura. This digital media strategy will include: a revamping of the Visit Ballyhoura website to include embedded video, downloadable visitor maps, trail route maps, itineraries, and the ability for visitors to book accommodation, activities and bundles; the ability to take online bookings and raise revenue through referral fees thus contributing to the sustainable operation of Ballyhoura Fáilte; and social media content including the **Facebook page, YouTube, Instagram and Twitter account**. While discoverireland.com currently has information on some Ballyhoura based businesses it does not include all nor does it have detailed content on many. This contract should include optimising this content as well as producing a range of experiential bundled offers for visitors.
- Action 12.2, regarding the **commissioning of video content for Ballyhoura based adventure activities, food & craft businesses**, reflects the growing use of video content by visitors in decision-making. High quality video content can be a key driver in increasing visitor numbers to a destination or attraction.
- Action 12.3, regarding commissioning a **smartphone application for Ballyhoura Country**, reflects the increasing use of smartphones and tablets for visitors' decision making
- Action 12.4, regarding **merging customer databases** within the area, will enable scaled online promotion which will benefit the whole destination as well as those businesses participating – driving business through co-opetition

Action	Responsible Partner(s)	Timescale /Priority	Target Audience	Key Performance Indicator (KPI)
12.1 Commission a digital strategy for the Ballyhoura Country. This will include: <ul style="list-style-type: none"> • Revamp the Ballyhoura website to include a link on the www.discoverireland.ie and www.ireland.ie websites with embedded video, downloadable visitor maps, trail route maps, itineraries, and the ability for visitors to book accommodation, activities and bundles. • Develop Facebook page, YouTube, Instagram and Twitter account for Ballyhoura Country with advertising to drive traffic to Facebook page and place promotional videos on YouTube to include attractions, activities, food and craft. • Optimising information on tourism products and activities in the Ballyhoura Country area on www.discoverireland.com • Producing experiential offers for use on www.discoverireland.com • Producing bundle options for visitors to tailor make itineraries and make information available on a dedicated website. 	Ballyhoura Fáilte External service provider Activity Providers Accommodation sector Attractions Fáilte Ireland	2015-2017	All visitors	Digital strategy commissioned
12.2 Commission video content for YouTube & website promotion of main attractions, activities, food, craft businesses.	Appointed external marketing agency Fáilte Ireland	2015-2017	All visitors	Video content commissioned
12.3 Develop a smartphone application for the whole Ballyhoura Country area.	Ballyhoura Fáilte Fáilte Ireland Tourism Ireland External service provider	2015-2017	All visitors	Smartphone app developed
12.4 Investigate opportunity to cooperate with other businesses and agencies to merge customer databases within the area to enable scaled online promotion.	Appointed external marketing agency	2015-2016	All visitors	Customer databases merged into one common database for online promotions

Programme 13: Marketing & Promotion – Regional Marketing & Promotion**Rationale**

The aim of this programme is to focus on collaborative marketing methods and to ensure a strong profile for Ballyhoura as a visitor destination. Collaboration is both internal and external: the development of bundled packages focuses on operators in Ballyhoura working together; ensuring that Ballyhoura is a key element in the forthcoming East and South Destination Plan, and is central in the implementation of the recently-approved Munster Peaks (Great South Mountain Park) action plan, requires strong working links with respectively Fáilte Ireland and the company charged with implementing the Munster Peaks plan; working with specialist marketing groups like Dream Ireland in respect of self catering will necessitate commitment from both the individual operators and Ballyhoura Fáilte with the outside agency. Actions include:

- Action 13.1, regarding the **East and South (Heritage & Culture) Destination Plan**, reflects the needs to ensure this Ballyhoura Country Tourism Strategy 2020 is considered as an integral part of that plan through lobbying the relevant stakeholders i.e. Fáilte Ireland
- Action 13.2, regarding **collaborative group marketing opportunities**, envisages Ballyhoura Fáilte collaborating with other similar destinations in the promotion of its activities and attractions e.g. marketing Ballyhoura mountain-biking with other mountain-biking venues on the island of Ireland; marketing Doneraile Court as a part of a national garden tour.
- Action 13.3, regarding the preparation of an **Experience Development Strategy** in conjunction with Fáilte Ireland toolkit in relation to Product : Service : Story : Narration reflects the need for a strategic approach in this regard. It is envisaged that Ballyhoura Fáilte would seek Fáilte Ireland input on this.
- Action 13.4, regarding **a link with the Munster Peaks (Great Southern Mountain Park), through the company established to process the implementation of that Plan**, for cross-marketing and international collaborative marketing as a destination of scale to attract international attention, thus driving visitor numbers and revenue.
- Action 13.5, regarding **collaborating with a specialist self catering marketing group** to increase market awareness of Ballyhoura and drive demand for the area's self catering operations.
- Action 13.6, regarding the encouragement of all visitor information offices and heritage centres to offer visitors '**Great Days Out**' packages with details of key experiences visitors can do in a day, reflects the success of similar initiatives elsewhere such as Lismore Heritage Centre.
- Action 13.7, regarding the creation of a series of **hen & stag packages** with an emphasis on 'staycations', could include 1, 2, 3, 4 and 5 day packages to entice this lucrative market to Ballyhoura.
- Action 13.8, regarding the coordination of the promotion of **current festivals and events** within the Ballyhoura Country area, reflects the need to ensure that the tourism potential of such festivals is maximised, and that festivals are timetabled in the most efficient way to attract visitors in the peak and shoulder seasons. It is envisaged that Fáilte Ireland input would be sought here.
- Action 13.9, regarding the introduction of an **attraction and activity discount card** for local residents, is designed to capitalise on the VFR market, driving growth in word of mouth referrals.

Action	Responsible Partner(s)	Timescale/Priority	Target Audience	Key Performance Indicator (KPI)
13.1 Lobby to ensure Ballyhoura Country Tourism Strategy 2020 is considered as an integral part of the East and South (Heritage & Culture) Destination Plan.	Ballyhoura Fáilte Fáilte Ireland	2015-2020	Fáilte Ireland	Ballyhoura Country considered as a unique and distinctive destination within the wider East & South Destination Plan
13.2 Investigate collaborative group marketing opportunities e.g. marketing Ballyhoura mountain-biking with other mountain-biking venues on the island of Ireland; marketing Doneraile Court as a part of a national garden tour.	Ballyhoura Fáilte Fáilte Ireland	2015-2020	All visitors	Collaborative marketing opportunities maximised
13.3 Prepare Experience Development Strategy in conjunction with forthcoming Fáilte Ireland toolkit in relation to Product : Service : Story : Narration	Ballyhoura Fáilte Fáilte Ireland	2015	All visitors	Experience Development Strategy prepared

13.4 Link with the company established to implement the Munster Peaks (Great Southern Mountain Park) action plan for cross-marketing and international collaborative marketing	Ballyhoura Fáilte Company established to implement the Munster Peaks (Great Southern Mountain Park) action plan	2015-2020	All visitors	Collaborative measures undertaken with the company established to implement the Munster Peaks (Great Southern Mountain Park) action plan
13.5 Coordination with a marketing group specialising in Ballyhoura's main accommodation sector i.e. self catering. The arrangement would entail individual self-catering operators signing up with the agency – Dream Ireland – and Ballyhoura Fáilte financing the costs of a destination newsletter to a database of 100,000 households, a web newsletter and online promotional activities	Ballyhoura Fáilte Dream Ireland Self catering accommodation providers	2015	All visitors in particular Domestic – overnight or longer holidays	Self catering accommodation providers signed up to Dream Ireland Destination marketing programme implemented
13.6 Encourage all visitor information offices, heritage centres to offer visitors 'Great Days Out' packages with details of key experiences visitors can do in a day	Ballyhoura Fáilte Heritage Centres	2015	Sightseers and Culture Seekers, in particular Culturally Curious Great Escapers	Great Days Out packages offered by all visitor/heritage centres.
13.7 Develop series of hen & stag packages with an emphasis on 'staycations'. Include 1, 2, 3, 4 and 5 day packages	Ballyhoura Fáilte Accommodation providers Attractions Activity providers	2015	Sightseers and Culture Seekers, in particular Social Energisers	Multi-day hen & stag packages compiled and promoted
13.8 Coordinate promotion of current festivals and events within the Ballyhoura Country area.	Appointed external marketing/management agency Ballyhoura Fáilte	2015-2017	All visitors	Promotion of festivals and events coordinated
13.9 Introduce attraction and activity discount card for local residents to capitalise on VFR market	Ballyhoura Fáilte Accommodation providers Attractions Activity providers	2015	Local resident community Visitors from the VFR market	Ballyhoura resident discount card introduced
See action 5.15 in relation to the proposed Ballyhoura Tourist Trail linking the Wild Atlantic Way at Limerick City to the Munster Peaks (Great Southern Mountain Park)/East&South Destination				

Programme 14: Monitoring & Evaluation**Rationale**

The aim of this programme is to review and improve Ballyhoura as a destination against agreed criteria, and to ensure progress against the objectives of this plan. This includes:

- Action 14.1, regarding an **annual review of progress** against actions identified within this strategy to ensure the implementation of the strategy remains on target.
- Action 14.2, regarding the introduction of an economic impact monitoring system based on accommodation sector review of bednights, aims to increase the intelligence available to Ballyhoura Fáilte, ensuring that decision making is evidence based.
- Action 14.3, regarding the commissioning of a **visitor monitoring plan** for the Ballyhoura Country area, aims to ensure Ballyhoura Fáilte is aware of visitor volume and trends, and is able to use this information to inform decision making.
- Action 14.4, regarding participation in the **European Tourism Indicator System** for the Sustainable Management of Destinations (as have Burren and Cliffs of Moher Geopark), would enable benchmarking the destination against agreed criteria; and lead to a more sustainable destination as a foundation for marketing advantage.
- Action 14.5, regarding the installation of **track counters on Ballyhoura Way and Kilmallock cycle routes**, aims to ensure Ballyhoura Fáilte is aware of visitor volume and trends, and is able to use this information to inform decision making.

Action	Responsible Partner(s)	Timescale/Priority	Target Audience	Key Performance Indicator (KPI)
14.1 Annual review of progress against actions identified within this strategy	Ballyhoura Fáilte	2015-2020	Ballyhoura Fáilte	Annual progress review undertaken
14.2 Introduce economic impact monitoring system based on accommodation sector review of bednights	Ballyhoura Fáilte Accommodation providers	2015-2020	Ballyhoura Fáilte Tourism trade in Ballyhoura	Annual evaluation of economic impact
14.3 Commission a visitor monitoring plan for the Ballyhoura Country area	Ballyhoura Fáilte External service provider	2015	Ballyhoura Fáilte	Visitor Monitoring Plan prepared
14.4 Consider taking part in the European Tourism Indicator System for the Sustainable Management of Destinations	Ballyhoura Fáilte Fáilte Ireland Burren & Cliffs of Moher Geopark	2015-2016		Decision taken on adoption of European Tourism Indicator System
14.5 Install track counters on Ballyhoura Way and Kilmallock cycle routes	External service provider Ballyhoura Fáilte	2015-2016	Ballyhoura Fáilte	Track counters installed on key routes

Appendices

Appendix 1 – Asset Management System

Asset management systems and asset management plans can be very useful to retain control over recreation assets and to ensure safety.

In 1995 14 people died when a viewing platform maintained by New Zealand's Department of Conservation (DOC) collapsed at Cave Creek. The inquiry decided the Department had acted negligently but was seriously underfunded to maintain those assets. Since the inquiry, radical changes have been made to the Department's procedures to prioritise safety, including the implementation of a comprehensive asset management system to catalogue, track and trigger regular inspections of all significant structures and facilities managed by the Department. More than 350 rangers are using the SAP Work Manager⁶ mobile app to manage their work orders. Twenty-five inspection staff also use the new mobile tool to manage inspections of assets, and ensure the safety of the DOC employees.

Asset Management Plans consolidate data and information required to make optimised decisions through the lifecycles of assets. This incorporates lifecycle costing which is essential to enable replacement of assets over time.

An asset management system for Ballyhoura would consist of a multi-year programme involving a wide range of visitor assets such as sections of trail, seats, lighting, bins, slipways, toilets, service blocks and signage for those assets owned by Ballyhoura Development. To enable a long term management programme to be put into place, use of an asset management system is recommended to catalogue and monitor these assets, each of which is attributed a unique identification number. In addition to capital costs there will be a long term replacement value attributed to these assets which can be calculated on an annual basis via such a system. This also enables a greater level of public safety to be achieved.

Further detail on asset management can be found on:

<http://www.dsr.wa.gov.au/assetmanagementguide>

An example of an Irish based company offering asset management systems is Compass: <http://compass-softtech.com/asset-management.html>

⁶ <http://www.sap.com/pc/bp/eam.html>

Appendix 2 – Country House Attractions Examples

2.1 Westport House, County Mayo

<http://www.westporthouse.ie/>

The 18th Century Westport House in County Mayo has been open to the public since 1960 and is privately owned and operated by the Browne family, who are direct descendants of Grace O' Malley, the 16th Century Pirate Queen of Connaught. The house & gardens offer a wide variety of things to see and do for all ages including exhibitions, family-fun, events, weddings, gardens & walks, adventure activity and camping.

Entry Fee

Westport House & Grounds	Buy at ticket office	Buy online for 5% discount*
Adult	12.50	11.85
Senior (over 65's)	10	9.50
Student	10	9.50
Children	6.50	6.15
Child (2 and under)	Free	

*Tickets can be purchased online through the website.

Exhibitions

There are a number of permanent exhibitions at Westport House:

- The Grace O'Malley Exhibition
- The Last 50 Years at Westport House
- Howe Peter, Champion of the Slaves
- Waxworks Display of Famous Visitors to the West
- The Brownes & The Development of the Town of Westport

Family Fun

Westport promotes itself as an outdoor attraction for families with children under 12 with rides, slide, boats, trains, go karts, indoor soft play area, pitch & putt, bouncy castles and playgrounds. In addition, Westport House provides both fun and learning through its Grace O'Malley Children's Tour, Dungeon Experience, funny mirror, Paint your own Pottery and more.

Attractions include:

- Swan Pedalo Boats
- The Pirate's Plunge
- The Cannon Ball Run
- Westport House Express train ride
- The Pirate Queen Swinging Ship
- The Pirate's Den (indoor soft play)
- Pitch & Putt
- Grace's Bouncy Castle
- Go Karts (indoor)
- The Pirate's Playground

Events

Themed events include:

- Birthday parties (pirate themed)
- Easter Egg Hunt
- Fireworks Extravaganza
- Halloween Fest
- Winter Wonderland (Santa's Grotto, Elves' Workshop)

Private events can also be held at Westport House such as launch events, birthday or anniversary celebrations, corporate events, conferences, meetings, exhibitions, concerts or any other special event with an events team to help.

Weddings

Westport House was voted Ireland's Best Exclusive Wedding Venue by weddingsonline.ie in 2011 and shortlisted again in 2013. All three floors and thirty rooms of Westport House itself are exclusively open to the wedding party. The venue can seat 60 in the Drawing Room, or up to 120 in the Long Gallery with outside caterers. Up to 175 guests can be accommodated for an evening celebration.

Gardens & Walks

Westport House's setting includes a lake, terraces, wonderful gardens and magnificent views overlooking Clew Bay, the Atlantic Ocean, Clare Island and Ireland's holy mountain Croagh Patrick. The 480 acre grounds require a team of 10 gardeners and maintenance workers. There is a 1.5km riverside loop walk and a Tree Trail.

Adventure Activity

The Adventure Activity Centre offers:

- Archery
- Combat games
- Sky Challenge (Climb, zip, jump)
- Zorbing
- Zipwire

Camping

Westport House Caravan & Camping Park can be booked online through the website. Charges are:

	Hiker	Unit + 2 adults	Unit + 2 adults & 2 kids
Low Season	€12	€24	€32
High Season	€12	€27	€35
Electricity - €3 Additional Children - €3 Additional Adults - €5 Extra Car- €5 Awning - €5			

2.2 Belvedere House, County Westmeath

<http://www.belvedere-house.ie/>

Belvedere House opened to the public in 2000, is owned and operated by Westmeath County Council and attracts over 160,000 visitors a year. The 160 acre lakeside estate includes a fully restored Georgian Villa built in 1740; Victorian walled garden, naturalistic designed 18th century parkland punctuated with romantic follies. Belvedere hosts large scale outdoor events such as multistage weekend music festivals to smaller intimate garden theatre performances.

Entry Fee

- | | |
|---------------------------------|--------|
| • Adult | €8.00 |
| • Children | €4.00 |
| • Senior Citizen/Student | €6.00 |
| • Family: 2 Adults & 2 Children | €23.00 |
| • Family: 2 Adults & 1 Child | €20.00 |
| • Extra Child | €3.00 |

Online booking available

Gardens & Parkland

'The Victorian Walled Garden at Belvedere consists of a one and a half acre sloped garden with Thomas Messenger style glasshouse. The Garden is a feast for the senses with tumbling herbaceous borders, old rose garden, fragrant herb garden and vegetable potager. At the end of the Victorian Garden is a new area The Enchanted Glen a secret Fairy Garden hidden away from prying eyes.'

Meeting Facilities

Bury and Marley Rooms – suitable for meetings/seminars, lectures/presentations, exclusive receptions

- Numbers seated theatre style - 33 (each room)
- Numbers seated at tables - 16 (each room)

The Courtyard - suitable for: receptions, product launches, musical events, lectures & presentations, buffet parties, 4 Course Lunches - Menu available.

- Numbers seated theatre style – 200
- Numbers standing - 250

The Education Room - suitable for seminars & workshops, meetings, presentations, school groups educational programmes

- Number seated theatre style – 35
- Number seated at tables – 15

Courtyard Cafe

Operated on contract

Events

- A Feast of Fireworks at Belvedere
- Halloween Events at Belvedere
- Children's Birthday Parties
- St Patrick's Day events
- Dog Shows
- Heritage Week Events

Appendix 3.1 – World Heritage Site Nomination Process

The **World Heritage Convention** promotes international cooperation to protect heritage of such outstanding universal value that its conservation is important for current and future generations.

Adopted by the UNESCO General Conference in 1972, the Convention established the **World Heritage List** as a means of identifying that some places, either natural or cultural, are of such significance as to be the responsibility of the international community as a whole. The World Heritage List serves as a heritage conservation tool. The Convention is overseen by the World Heritage Committee.

Nomination process

1 Tentative List

The first step a country must take is to make an 'inventory' of its important natural and cultural heritage sites located within its boundaries. This 'inventory' is known as the Tentative List, and provides a forecast of the properties that a State Party may decide to submit for inscription in the next five to ten years and which may be updated at any time. It is an important step since the World Heritage Committee cannot consider a nomination for inscription on the World Heritage List unless the property has already been included on the State Party's Tentative List.

States Parties are encouraged to submit their Tentative Lists, properties which they consider to be cultural and/or natural heritage of outstanding universal value and therefore suitable for inscription on the World Heritage List. States Parties are encouraged to prepare their Tentative Lists with the participation of a wide variety of stakeholders, including site managers, local and regional governments, local communities, NGOs and other interested parties and partners. States Parties should submit Tentative Lists, which should not be considered exhaustive, to the World Heritage Centre, at least one year prior to the submission of any nomination. States Parties are encouraged to re-examine and re-submit

their Tentative List at least every ten years. States Parties are requested to submit their Tentative Lists using a Tentative List Submission Format, in English or French, containing the name of the properties, their geographical location, a brief description of the properties, and justification of their outstanding universal value.

Nominations to the World Heritage List will not be considered unless the nominated property has already been included on the State Party's Tentative List.

2 The Nomination File

By preparing a Tentative List and selecting sites from it, a State Party can plan when to present a nomination file. The World Heritage Centre offers advice and assistance to the State Party in preparing this file, which needs to be as exhaustive as possible, making sure the necessary documentation and maps are included. The nomination is submitted to the World Heritage Centre for review and to check it is complete. Once a nomination file is complete the World Heritage Centre sends it to the appropriate Advisory Bodies for evaluation.

3 The Advisory Bodies

A nominated property is independently evaluated by two Advisory Bodies mandated by the World Heritage Convention: the International Council on Monuments and Sites (ICOMOS) and the World Conservation Union (IUCN), which respectively provide the World Heritage Committee with evaluations of the cultural and natural sites nominated. The third Advisory Body is the International Centre for the Study of the Preservation and Restoration of Cultural Property (ICCROM), an intergovernmental organization which provides the Committee with expert advice on conservation of cultural sites, as well as on training activities.

4 The World Heritage Committee

Once a site has been nominated and evaluated, it is up to the intergovernmental World Heritage Committee to make the final decision on its inscription. Once a year, the Committee meets to decide which sites will be inscribed on the World Heritage List. It can also defer its decision and request further information on sites from the States Parties.

5 The Criteria for Selection⁷

To be included on the World Heritage List, sites must be of outstanding universal value and meet at least one out of ten selection criteria. **These include:**

(i) to represent a masterpiece of human creative genius;

(ii) to exhibit an important interchange of human values, over a span of time or within a cultural area of the world, on developments in architecture or technology, monumental arts, town-planning or landscape design;

(iii) to bear a unique or at least exceptional testimony to a cultural tradition or to a civilization which is living or which has disappeared;

(iv) to be an outstanding example of a type of building, architectural or technological ensemble or landscape which illustrates (a) significant stage(s) in human history;

(v) to be an outstanding example of a traditional human settlement, land-use, or sea-use which is representative of a culture (or cultures), or human interaction with the environment especially when it has become vulnerable under the impact of irreversible change;

(vi) to be directly or tangibly associated with events or living traditions, with ideas, or with beliefs, with artistic and literary works of outstanding universal significance. (The Committee considers that this criterion should preferably be used in conjunction with other criteria);

(vii) to contain superlative natural phenomena or areas of exceptional natural beauty and aesthetic importance;

(viii) to be outstanding examples representing major stages of earth's history, including the record of life, significant on-going geological processes in the development of landforms, or significant geomorphic or physiographic features;

(ix) to be outstanding examples representing significant on-going ecological and biological processes in the evolution and development of terrestrial, fresh water, coastal and marine ecosystems and communities of plants and animals;

(x) to contain the most important and significant natural habitats for in-situ conservation of biological diversity, including those containing threatened species of outstanding universal value from the point of view of science or conservation.

Irish World Heritage Sites

The relevant Irish portal for World Heritage Sites is www.worldheritageireland.ie. This website states:

'The Department of Arts, Heritage and the Gaeltacht acts on behalf of Ireland as a State Party to the World Heritage Convention. It is responsible for the submission of nomination documentation to UNESCO for inclusion of properties on the World Heritage List and for reporting to UNESCO on the state of conservation of our World Heritage properties.'

⁷ <http://whc.unesco.org/en/criteria/>

In October 2008, the Minister for the Environment, Heritage and Local Government set up an Expert Advisory Group to review Ireland's Tentative List of properties for future nomination to the World Heritage List. The review was undertaken during 2008 and 2009, when the Group considered which properties best met the criteria required for inscription on the World Heritage List. Following public consultation, assessment of proposals and consideration of submissions, the new Tentative List was approved by the Minister and submitted to UNESCO in March 2010. It replaces the previous list that was drawn up in 1992.

The nomination of any property, from the new Tentative List, for inscription on the World Heritage List will only take place after consultation with relevant stakeholders, interested parties and local communities. A property should be on the Tentative List of a State Party for, at least, a year before it can be nominated for inscription on the World Heritage List.

There is considerable work and time involved in the preparation of nomination documentation and a management plan for a property including a public consultation process. This stage of the process together with the public consultation will take at least two years. Thereafter the inscription process takes about a year and a half from the submission of the complete nomination document and management plan to consideration by the World Heritage Committee. Within this period of time, the Advisory Bodies to the Committee – ICOMOS (the International Council on Monuments and Sites) and IUCN (the International Union for Conservation of Nature) - will assess the nominated property to see if it meets the requirements for inscription on the World Heritage List and make their report to the Committee.'

There are currently two places inscribed on the World Heritage List for Ireland.

These are:

- Brú na Bóinne - Archaeological Ensemble of the Bend of the Boyne (1993)
- Sceilg Mhichíl (1996)

There are seven places on the Tentative List. These are:

- The Burren (2010)
- The Historic City of Dublin (2010)
- The Céide Fields and North West Mayo Boglands (2010)
- Western Stone Forts (2010)
- The Monastic City of Clonmacnoise and its Cultural Landscape (2010)
- Early Medieval Monastic Sites (2010)
- The Royal Sites of Ireland: Cashel, Dún Ailinne, Hill of Uisneach, Rathcroghan Complex, and Tara Complex (2010)

Comment from Department of Arts, Heritage and the Gaeltacht

Tourism Development International contacted the Department of Arts, Heritage and Gaeltacht in relation to potential applications for Doneraile Court & Gardens and Lough Gur. Their response was:

The first step to inscription as a World Heritage Site is to be placed on the Tentative List. In 2008 the then Minister for the Environment, Heritage and Local Government established an expert advisory group to review Ireland's Tentative List and to identify the Irish sites which best met the criteria for inclusion on the World Heritage List. Following full public consultation and consideration by the expert advisory group, a new Tentative List for Ireland was approved and submitted to UNESCO in March 2010. The List was selected following an inclusive, consultative and scientific process that set out to identify the sites that most closely corresponded to the selection criteria laid down by UNESCO including, in particular, the definition of outstanding value. Information on these sites is available on our website www.worldheritageireland.ie.

I am afraid that I cannot at this point provide you with an indication as to when the next review of the Tentative List will take place. The Minister's current priority is achieving progress on nominating one of the sites on the current Tentative List for inscription by UNESCO on the list of World Heritage Sites.

I am attaching the application form for the Tentative List that was used in 2008 [Appendix 2]. Although the form may change the basic information required will remain the same as these are UNESCO requirements. By putting together the information required you will be in a good position to submit an application when a review of the Tentative List takes place.

I would also refer you to our website www.worldheritageireland.ie. In September 2013 the Department held a conference for stakeholders with sites on the current tentative list. Information from the conference is available to view on our website.⁸

⁸ Email from Catherine Desmond, DAHG, 24/10/14, Catherine.desmond@ahg.gov.ie, 01 888 2565

Appendix 3.2 – World Heritage Site Tentative List Application Form⁹

⁹ Detail taken from attachment to email from Catherine Desmond, DAHG, 24/10.14

Matters to be considered and order of information in defining the Tentative List

Note: All work must follow the details of the Terms of Reference for the Independent Expert Advisory Panel, the brief as contained in the Research Document 'The Tentative List and World Heritage Status' as revised from time to time and the notes of the Meetings of the Expert Advisory Group.

State Party

Priority among sites on the Tentative List:- *(This will result from the consideration of the information gathered on all the Tentative List sites:- The completeness of their data, the quality of support from the local community and stakeholders, the likelihood of getting nominated, their importance to tourism, education, cultural and economic benefits).*

Date of Submission/To Be Submitted:

- Submission prepared by:
- Name:
- Address:
- Institution:
- Email:
- Fax:
- Telephone:

Name of Property:

- State Province or Region:
- Latitude and Longitude, or UTM coordinates:
- Ground area (gross) of property to be defined:
- Maps of region, property, area of possible World Heritage Site
- Photos with subtitles of the Site's principal characteristics

Management

- Visit the site to look at the present condition, management, and local community opinion and stakeholders
- Anticipate the existing and required protection and management
- Note how the sites are protected under current legislation and/or management provisions
- Note what discussions have taken place and should take place to build consensus among local and national stakeholders

Criteria Met

See Research Document 'Tentative List and World Heritage Status' and especially:-

- Page 1 – definition of Cultural and Natural Heritage
- Appendix 1 – the 10 Criteria

Appendix 4 – Walking Route Maps

Example

Several websites offer detail on their walking routes linked to google maps such as the Sheep's Head Way:

<http://www.sheepsheadroutes.ie/SHW-N/01>

Another method is to use a company that enables maps to be created and hosted such as www.walkingroutes.ie, www.activeme.ie or www.everytrail.ie. These include the ability to add summary information, route maps, route elevation and GPS links.

- <http://www.walkingroutes.ie/2029-Darby%E2%80%99s-Bed-Loop.html>
- <http://www.activeme.ie/guides/walks/be-ara-way-entire-walking-route-maps-and-gps-cork-and-kerry-ireland/>

Example of Trail Kilkenny Route Map



Appendix 5: Walking Festivals Best Practice

Prerequisites

The basis for the organisation of a successful walking event can normally be considered to be a combination of:

1. large numbers of participants attracted across a range of demographic and interest segments,
2. significant economic benefits generated for the local community (frequently including charitable causes in the community,
3. the reputation and image of the destination as a sustainable tourism and recreation destination established and enhanced (thereby leading to return visitation and new visitors resulting from positive word-of-mouth by participants to others), and
4. the promotion of public health through outdoor physical exercise.

Variety and Types of Walk

In order to fulfil these goals, the destination needs to have strong natural and cultural resources that can support the development of a varied programme of walks according to different:

1. skill and stamina demands, and
2. themes and interests.

The core values of successful walking festivals are:

1. Nature,
2. Culture, and
3. Public health

Walking itineraries through scenic areas where nature offers an amazing variety of possibilities within comparatively short distances is a fundamental principle for a good walking event.

Cultural heritage themes based on historical events in the area, its agricultural or industrial heritage, and legends associated with it are all popular.

Themed walks will normally be led by a guide informed on the subject and/or accompanied by a talk on the subject.

Choice

Choice is important so that enthusiasts of one type of walk are catered for on each day of the festival. This principle applies to all gradations of walk in natural settings, but for themed walks it may not be possible to provide more than one or two walks.

Advance Publication

The selection and planning of walks need to be facilitated through the advance publication of clearly delineated and scheduled itineraries on website, mobile phone app and in printed material.

Associated Activities

Where festivals target families as well as dedicated walkers, a series of competitions can serve to stimulate and hold interest – not just for children but for adults too when prizes related to walking and outdoor activity are offered by the event's sponsors.

Contingencies

While climatic conditions cannot be controlled and predicted with limited accuracy, back up facilities in case of inclement weather should be available at hubs and other main centres on the walks i.e. permanent or temporary shelter.

Organisation

Effective organisation is a prerequisite to the successful operation of a walking festival. Ideally, a public private partnership working together can capitalise on the special qualities of the region and achieve the greatest range and level of benefits. The website and the promotional material need to be impressive, underlining the value of using professional guidance throughout the creative process.

Sponsorship

Commercial support from organisations providing related equipment and clothing, outdoor recreational activities and other items used by walkers is an important element of a successful walking event. Apart from financial support, sponsorship provides

promotion of the event, by creating the impression of a more complete package of activities.

Case Study: Isle of Wight Walking Festival, May and October 2014.

2014 was the 16th Anniversary of the Annual Isle of Wight Walking Festival held in May each year over a period of 16 days. It has grown from 39 walks in the programme to in excess of 200. In addition a second walking event held in October each year – the Walking weekend has over 50 more walks.

To keep the programme fresh, the organisers combine a number of old favourites with some new walks; and have compiled a full programme of walks for all abilities, from toddlers to the more mature, from ghost to coast, hikers to casual walkers. The event is promoted as the mission to get fit and healthy. All walks are led by knowledgeable and popular leaders who share their stories and history of the Island.

The May Walking Festival took place from 3 - 18 May 2014 with the Autumn Walking Weekend held between 24 - 27 October 2014. A regular newsletter is published outlining the forthcoming festival and associated events.

There is a dedicated website (www.isleofwightwalkingfestival.co.uk) with ten individual pages: Home, Walks, General Information, Galleries, Sponsors, Contact Us, Competitions, News, Travel, Island Trails. A full brochure is available online on <http://isleofwightwalkingfestival.co.uk/Files/Documents/Autumn-walking-weekend-programme-2014-web.pdf>.

The site is interactive allowing individual choice of:

- Distance (less than 3 miles, between 3 and 6 miles, 6 to 10 miles, 10 to 15 miles, over 15 miles),
- Pace (gentle, moderate, brisk),
- Difficulty (easy, fairly easy, moderate, fairly strenuous, strenuous),

- Date (in the case of the Autumn Walking Weekend 24, 25, 26, 27 October),

There were a total of 64 themed walks over the four days in the Autumn Walking Weekend. Apart from scenic walks, themes were as varied as:

- Fossil hunting,
- Wildlife-based – e.g. hawk spotting, red squirrels at Quarr Abbey (walk and talk), Lily May's Duck Feeding walk,
- Walk the rails (along old railway tracks),
- Health walks, walk and exercise, Tai Chi and Qigon etc,
- Tiny Tots and Toddlers Tea Party,
- Jimi Hendrix themed – in and around the area of the 1970 Isle of Wight Music Festival,
- Speed dating,
- Carnival Trail – in conjunction with the launch of the Carnival Trail app.

A series of seven competitions were held in conjunction with the Autumn Walking Weekend with prizes including:

- Action camera (Garmin – the title sponsor of the 2014 event),
- Camping holiday at one of the Island's holiday parks,
- Walking holiday accommodation (3 nights B & B) and walking pack,
- Hi-Tec walking boots

The October 2014 event had 22 sponsoring organisations:

- Red Funnel & Wightlink (ferry companies),
- Isle of Wight Council and Isle of Wight Tourism,
- Island 2000 Trust,
- Natural Enterprise (Isle of Wight Economic Partnership),



- Wight Walks,
- Isle of Wight County Press,
- Isle of Wight Radio,
- Natural England,
- The National Trust,
- Country Walking,
- Ramblers,
- Step by Step walking holidays,
- Walking the way to health,
- Garmin (wearable technology),
- Hi-Tec (walking boots),
- Buff (headwear),
- Goodyears Outdoors,
- hf Holidays,
- The Orchards Holiday Caravan and Camping Park,
- Regatta Great Outdoors,
- Clif Bar (energy bar).

Garmin states in its sponsorship announcement:

"We're proud to become the headline sponsor of the Isle of Wight Walking Festival for 2014. The growth of the festival in recent years shows that more and more people are keen to experience the great outdoors, having fun and getting fit at the same time. Supporting family and mass participation events is always highly rewarding for all concerned, and Garmin is pleased to be a major supporter of this year's festival."

Appendix 6: Equestrian Product Development

The key features and practices of a number of successful examples of equestrian product development in various locations are examined in this appendix. None of the destinations examined are at the same early and uncoordinated stage of development of an equestrian tourism and recreation product as is Ballyhoura. They have developed the range and calibre of equestrian-based recreational experiences to the stage where these represent a main component of their overall recreational offering. Their approach provides pointers for Ballyhoura as it seeks to develop this product range to recreational users from within and outside Ireland.

Lessons

A destination will only draw tourists and other recreational users in significant volumes for its equestrian features and activities if it has established a reputation of offering facilities and experiences of a high calibre. Becoming known as an outstanding destination for equestrian pursuits can be achieved in one, or a combination, of the following ways:

1. **Specialisation:** a specialisation in one form of equestrian pursuit or attraction is one means of developing the image as a horse destination. A destination that is widely known for a particular equestrian activity can then develop other horse-related features and events piggybacking on this reputation. Examples are polo in Aiken, and the annual Colonial Cup steeplechase in Camden (both South Carolina).
2. **Regular event or series of events:** the holding of an equestrian event that can be promoted extensively and in advance represents a means both of;
 - getting all the area's horse-related interests and operators to come together, and
 - the opportunity to focus the outside world's attention on a single, major aspect of the destination. As such, a horse show or festival can build the destination's reputation. Camden is home to the South Carolina Equine Park which attracts a series of events and generates business for the area's equestrian operators.
3. **Flagship feature or attraction:** in the same way that a specialisation in a particular equestrian activity or a focal equine event can boost a destination's image as a horse destination, so the presence of an established flagship feature can act as a magnet for visitors from outside the area. The flagship can be an event such as the annual Colonial Cup steeplechase held in Camden, South Carolina, or an attraction such as Kildare's Irish National Stud, Japanese Gardens and Horse Museum.
4. **Trail network:** establishing a trail network like the Mary Towneley Loop is a way both of attracting experienced horse riders (including those with their own horses) looking for challenging rides, and those seeking less demanding rides over sections of a trail, including those wanting guided rides and tuition. Trails build up the reputation of an area. Experience elsewhere, such as in the case of the Mary Townley Loop, is that horse riders, mountain bikers and walkers can share trails successfully.
5. **Collaboration and Coordination:** any sector comprised of a number of small or medium-sized operations will achieve far more by combining forces and speaking with a single voice to the outside world in its marketing message. This does not entail a reduction of each operation's individuality or undermining of control of its own business. By working together, the equestrian operator group's marketing reach can be greater and a more substantive image for the area built up.

Case Studies

The State of South Carolina is one of the leading US destinations for equestrian activities and attracts large numbers of mainly domestic visitors to engage in such pursuits. Aiken and Camden are the State's two main equestrian centres.

Aiken

The Visit Aiken website - <http://www.visitaikensc.com/whattodo/equestrian> - details the full range of equestrian activities provided through 30 operations in the area. The focus is on polo, schooling and boarding horses, and riding lessons. As such, Aiken is a destination for experienced and highly committed horse people. However, by providing a detailed calendar of events - <http://www.equestriancalendaraiken.com/> - and having a museum dedicated to horse racing – the Aiken Thoroughbred Racing Hall of Fame and Museum - http://www.visitaikensc.com/whattodo/detail/thoroughbred_racing_hall_of_fame_and_museum - the visitor with a casual interest in horses is also catered for.

The extensive number of equestrian facilities and features in Aiken has served to establish the area's reputation as a premier destination for horse-related activities and provide the economies of scale to warrant using it as one of the key strands of Aiken's destination marketing strategy.

Camden

Camden is the site of Springdale Race Course, home of the annual Carolina Cup steeplechase drawing crowds of over 65,000 from across the country – see <http://cityofcamden.org/visitors/thingstoseeanddo/carolinacup.aspx>. It is held in late March/early April and is one of the southeast's premier social events, with spectators enjoying an afternoon of racing, fashion and tailgating (an American term for a social event held on and around the open tailgate of a vehicle). This is one of just two race meetings a year held at the course, the Colonial Cup held in the autumn being a more informal occasion. The National Steeplechase Museum is situated within the grounds of the Springdale Race Course, and is open nine months of the year - <http://cityofcamden.org/visitors/thingstoseeanddo/steeplechasemuseum.aspx>.

Camden also has the South Carolina Equine Park, opened in 2009, and booked an average of 30 weekends a year, producing an average annual economic impact for the area of over US\$4 million. There are both open and covered arenas. The Park contracts with show operators in several disciplines and horse associations. It holds events and activities for all breeds and riders, including hunter/jumpers, quarter horses, paint horses, dressage, ranch horse shows, breed shows, and youth events. See <http://cityofcamden.org/visitors/thingstoseeanddo/scequinepark.aspx>

The reputation of Camden as a leading equestrian centre is based on the presence in the city of two flagship attractions, one an event (i.e. its association with the historic Colonial Cup), the other a facility (i.e. the State-of-the-art South Carolina Equine Park).

New Zealand

The national tourism destination website has a section dedicated to horse riding - <http://www.newzealand.com/uk/horse-riding/>. The site provides access to 19 articles (screened by location), 38 activities (by location, type of activity, and price) and 7 tours (by location, type of activity and tour, and price).

A horse back trekking operator like River Valley Stables pays particular attention to providing the type of product (i.e. horse and itinerary) suitable for the level of experience of the rider i.e. distinguishing between novice/beginner riders, intermediate riders, and advanced/experienced

riders; and also offers multi-day treks involving overnight stops

UK – Loop Trail

The **Mary Towneley Loop** is a 47-mile (76 km) circular route that forms part of the Pennine Bridleway National Trail, along the borders of Lancashire and Yorkshire. The loop was opened in 2002. It is named in memory of Mary, Lady Towneley, who drew attention to the poor state of England's bridleways and the need for a long-distance route for horse-riders. It is developed and used by mountain bikers and walkers/runners as well as horse riders.

The route joins the main Pennine Bridleway at two points, one near the village of Summit between Littleborough and Todmorden, and one just east of Worsthorne. West from Summit the Loop climbs to Top of Leach at 474 metres (1,555 ft). The trail then passes through the town of Waterfoot in the Rossendale Valley and follows tracks via Lumb before entering the Cliviger Gorge and then climbing up to the Long Causeway. Heading north it rejoins the main Pennine Bridleway just east of Worsthorne. The Loop then follows the main route to enter West Yorkshire at Widdop, crosses Heptonstall Moor and drops down to cross the Calder Valley, to the west of the town of Hebden Bridge, before passing the villages of Makinholes and Bottomley to return to Summit.

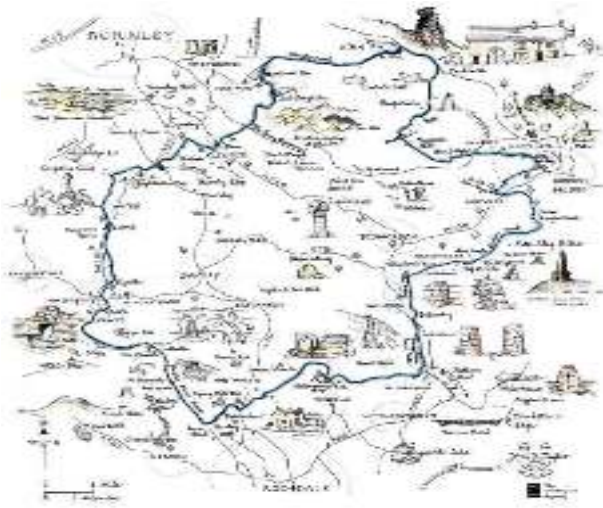
Access: there are good public transport links and several car parks along the route. Horse riders can use some of the car parks for loading and unloading horses.

Terrain: a variety of surfaces including grass tracks, stone setts, stone causeways, aggregate paths and some quiet roads. User-friendly gates, Pegasus crossings at main roads and clear signposting. The route is hilly and steep in places.

The trail creates and sustains a number of equestrian enterprises along its length providing stabling for horses brought by owners to the area, horse hire, guided excursions, riding tuition etc as well as business for accommodation, restaurants and other related equipment and retail operations in the area. Examples are Peers Clough Packhorses (<http://www.peerscloughpackhorses.co.uk/our-rides.html>), Towneley Trailriding (<http://www.towneleytrailriding.co.uk/>), Towneley Trail Bed and Box (<http://www.towneleytrailbedandbox.co.uk/>)

Full details of facilities for horse riders are given on the British Horse Society website <http://www.emagin.org/Route.aspx?route={CE333B1E-BAB5-4D47-ADDB-EFA3B63391BF}>.

A detailed account of a 3 day ride along the Loop is given by Equine Ramblers on <http://www.equineramblersuk.co.uk/horse-riding-stories.php?id=18>.



Source: <http://www.forba.org.uk/mtl.html>.



Source:

http://www.nationaltrail.co.uk/sites/default/files/pb_mary_towneley_loop_map.pdf

Appendix 7: Adventure Races

This note gives some examples of adventure races in Ireland and overseas and contact numbers for professional race organisers. The current Beast of Ballyhoura adventure race has a strong profile in Ireland. Through extension of the course towards the Galtee Mountains, Knockmealdown Mountains and Comeragh Mountains there is strong potential to develop a 3-4 day Mountains to Sea adventure race combining mountain-biking, mountain climbing, kayaking, running and road-biking. Tourism Development International recommends that Ballyhoura Development engage a professional race development company to investigate options for making the Beast of Ballyhoura into Ireland's toughest adventure race and of a scale that would allow international comparison.

Killarney Adventure Race

The Killarney Adventure Race is a one day multi adventure sport race. This race gives competitors the chance to run, hike, cycle and kayak some of the most dramatic, breathtaking and remote scenery in the world. There are 3 different routes options to suit all levels of fitness:

Sport: 27km

- Stage 1: Cycle - 11km
- Stage 2: Kayak - 1.5km
- Stage 3: Torc Mountain Run - 8km
- Stage 4: Road Bike - 6km

Pro: 60km

- Stage 1: Mountain Run - 7km
- Stage 2: Road bike - 35km
- Stage 3: Kayak - 1.5km
- Stage 4: Torc Mountain Run - 9km
- Stage 5: Road Bike - 6km

Expert: 70km

- Stage 1: Mountain Run - 7km
- Stage 2: Road bike - 35km
- Stage 3: Kayak - 1.5km
- Stage 4: Mangerton Mountain Run - 19km
- Stage 5: Road Bike - 6km

Gaelforce Series

http://www.gaelforceevents.com/en/about_us/gaelforce_events_story.html

Gaelforce West was last held on 16th August and consists of 67km, run, kayak, cycle, hill climb and finishes in Westport.

Speights Coast to Coast, New Zealand

Perhaps one of the toughest worldwide adventure races is the Speights Coast to Coast, a 1 or 2 day event traversing the South Island of New Zealand. More details at: <http://coasttocoast.co.nz/the-race/race-profile/>



Adventure race organisers

Multisport Adventure Ireland

Paul Mahon info@outfront.ie
www.outfront.ie
 086-3503994

Elite Event Management

www.eliteevents.ie/
info@eliteevents.ie
 087-6024621

Appendix 8: Leave No Trace Principles

At the heart of Leave No Trace are 7 principles for reducing the damage caused by outdoor activities. These are:

1. [Plan Ahead and Prepare](#)
2. [Be Considerate of Others](#)
3. [Respect Farm Animals and Wildlife](#)
4. [Travel and Camp on Durable Ground](#)
5. [Leave What You Find](#)
6. [Dispose of Waste Properly](#)
7. [Minimise the Effects of Fire](#)

Maura Lyons, Programme Manager

Leave No Trace Ireland, C/O Westport Town Council, Altamont Street, Westport, Co. Mayo

info@leavenotraceireland.org

www.leavenotraceireland.org

Appendix 9: Cooperative Destination Ballyhoura Marketing Campaign with Dream Ireland

As part of the trade consultation programme, Tourism Development International interviewed Dream Ireland, the country's leading self catering/holiday home marketing group. In the course of discussions, Dream Expressed a strong interest in working with the self catering operators of Ballyhoura and Ballyhoura Failte in mounting a destination marketing campaign for the area and its self catering businesses. Details of its proposal are given below while the letter confirming the company's interest is also included within this appendix.

Rationale

In order to achieve the greatest marketing reach – in terms of potential future visitors – at the lowest costs and highest return on investment, a destination can team up with a specialist marketing group. One such opportunity open to Ballyhoura is in respect of the self catering sector, the area's largest accommodation sector accounting for 47% of beds and half of bednights sold.

The example cited is a specific proposal made by the leading self catering marketing group, Dream Ireland. Though Dream Ireland is working with a couple of operations in Ballyhoura (i.e. Castle Oaks and the Irish Landmark Trust operations), it is largely unrepresented in the area; but is attracted by the opportunity to develop a portfolio of properties there.

Problems Perceived by Dream Ireland

Problem 1: the disparate nature and standard of commercial accommodation. Not only is there a significant range of types of accommodation but also a wide variety of standards. The large number of small operations, with only one or two units, means that a collective campaign would need to deal with up to 50 different owners. This pattern has two drawbacks: it makes it a lengthy and time consuming exercise to sign up each operation; and the large online booking agencies (OTAs) like Booking.com and Expedia would not feature many of the operations as they opt for those with multiple units.

Problem 2: the name Ballyhoura is not a name that would stand out. A marketing handle that is punchy and activity-oriented is needed. The "Heart of Rural Ireland" was mentioned as an example though not necessarily a recommendation.

Problem 3: getting the individual operators on board. They appear to fall into two camps: those that do not see the benefit of linking up with an outside organisation, preferring to keep doing it themselves and not, as they see it, relinquishing control to another entity; and those that have entered into an arrangement with an organisation like Gulliver Ireland or the Irish Self Catering Federation and received minimal benefit from it.

What could Dream Ireland do?

Though Dream Ireland's business is working with individual operators rather than on area promotion, it recognises the need to establish Ballyhoura on potential customers' radar so would work with Ballyhoura Failte in featuring the area.

Before it would undertake any promotion for the Ballyhoura area, Dream Ireland would need a large proportion of the self catering operations to sign up to www.dreamireland.com using the online registration form in conjunction with one on one help from the company's office for each property owner. All bookings will be subject to commission at 17.5% (plus VAT at 23%) and an annual renewal fee of €100 euro plus VAT will apply per property (with multiple units dealt with on an individual basis). This renewal fee would be deducted from the first payment to the owner so there is no upfront payment required.

Once the properties are registered Dream Ireland would work closely with Ballyhoura Failte to develop good regional information so that it can start preparing content to actively market the region and all the properties signed up within it. This stage would also involve Dream Ireland personnel visiting Ballyhoura to familiarise themselves with the area and all it has to offer so as to be in the best position to sell and market it effectively.

Postal Newsletter: Include the Ballyhoura region as a featured location in Dream Ireland's June 2015 postal newsletter that would be sent out to all 100,000 households on its database within Ireland. The newsletter is published twice yearly – in December for the early bookers, and at the beginning of June for the late bookers.

Email Newsletter: Include Ballyhoura in at least 6 email newsletters to all Dream Ireland's 80,000 subscribers.

Website Marketing: Market Ballyhoura on Dream Ireland's website along with all the properties and ensure they are all tagged correctly so they can be found in regional, facilities, type of house etc searches on its website.

Blog: Create blog content to be shared across our social media sites.

Global Holiday Home Sites: Examine the possibility of getting as many of the properties as possible featured on global holiday homes sites such as holidaylettings.co.uk. flipkey.com/ homeaway.com/ vrbo.com and more.

Monitoring and Follow Up Activities: Check the business flow, where it is coming from, seasonality etc and follow up with appropriate marketing activities over the course of the year such as attending Metheal.

Marketing Budget: €11,000-13,500.00 per annum to cover all activities above.



Ireland's No.1 Holiday Homes Website
www.dreamireland.com

HOLIDAY HOMES



Mr David Mac Nulty
Director
Tourism Development International
14 Clarinda Park North
Dun Laoghaire
Co Dublin.

24th November 2014

Dear Mr MacNulty

Further to our recent communications I would like to confirm that Dream Ireland Holiday Homes would be delighted to work alongside Ballyhoura Failte and the individual self-catering operators within its remit with a view to developing a destination marketing programme for Ballyhoura through a newsletter, online and other marketing methods.

Should you require any additional information then please don't hesitate to contact me directly.

We very much look forward to the opportunity of working alongside you and all parties involved in this very interesting project.

Yours sincerely,

A handwritten signature in black ink, appearing to read "Lisa Argue".

Lisa Argue
Marketing Manager.

We'll leave the light on for you

Dream Ireland Holiday Homes, The Lodge, Kenmare, Co Kerry, Ireland
Tel: 064 66 41170 (+353 64 66 41170 int'l) • Fax: 064 66 41839 (+353 64 66 41839 int'l) • Email: info@dreamireland.com
Dream Ireland is a trading name of Dream World Travel Ltd • Directors: Alexandra Baradi, Tony Daly • Company Reg. No: 360491 • VAT No: IE6380491A

www.dreamireland.com

Appendix 10 – Visitor Market: Analysis, Performance and Prospects for Ballyhoura

1.1. Tourism Potential

The tourism potential for Ballyhoura Country can be measured at a number of different levels.

1. At the broadest level Ballyhoura is looking to exploit the 3.5 million overseas visitors who come to Ireland in order to enjoy the sightseeing opportunities that the country offers while exploring its culture and heritage, the 100,000 holiday visitors from Northern Ireland and the more than 3 million domestic holiday trips taken by Irish residents.
2. At the inner level of potential the market is the holidaymakers who visit the South-West, Shannon and South-East regions.
3. This can be further refined to holidaymakers who visit counties Cork and Limerick, with additional potential in appropriate parts of Tipperary South.
4. Finally, the core potential for Ballyhoura are holidaymakers as above with a particular interest in activities, primarily hiking and hill walking, cycling and equestrian pursuits, and those who visit places of historical and cultural interest while in Ireland.

Throughout this section we will attempt to put numbers on these levels of potential, while bearing in mind that in many cases they will not be discreet values but are subject to varying levels of overlap, and we will explore the profile of the constituent markets and segments in order to better understand their motivations and needs. Existing data will allow us to examine the overseas visitors in greatest detail as there are greater limitations on the scope of the data in respect of both the domestic and Northern Ireland markets.

1.2. Sightseers and Culture Seekers

The key segment for Ireland in each of the main overseas markets, Britain, France, Germany and the United States, is **Sightseers and Culture Seekers**, tourists for whom exploring the country's sights and finding out about its culture is the key motivator for coming here on holiday. Research indicates that more than 20 million people meet this criterion in the four markets referred to above.

- This segment of overseas visitors is characterised by a sense of exploration, a willingness to engage and a desire for authentic new experiences. They are also looking for distinctive local experiences and cultures and the opportunity to escape from their everyday lives.
- Typically they tend to be in the ABC1 socio demographic, be married, are older than the average traveller.
- The British Sightseer and Culture seeker tends to take many short breaks and the potential for Ireland tends to be either short city breaks or longer rural holidays, the latter being more relevant to Ballyhoura.
- Beautiful scenery and having lots to see and do are the key considerations for a holiday in Ireland. Exploring small towns and villages and visiting historic houses and castles and gardens is also important. Experiencing local food and drink, music and folklore is a significant motivation. Ultimately this group wants to get under the skin of a destination, create stories and memories from their experiences, return home relaxed and refreshed.
- Word of mouth, both on and off line, the Internet and guide books are key sources of holiday information and inspiration for this group. The Internet is the key tool for planning holidays, while the French still widely read newspapers and magazines, guidebooks

remain very popular with the Germans, and a significant minority of Americans still use a travel agent.

A secondary key segment in the British market is **Scenic Relaxers**, that is those for whom relaxing and getting away from it all is the motivator for going on holiday. Typically this segment tends to be slightly younger than the Sightseers and Culture Seekers, with more emphasis on easy and stress free experiences and spending quality time with family or a partner. Value for money and safety and security are also key to this group.

Redefining the Overseas Holiday Segments

The key overseas holiday segments have been further refined in 2013 and the three most salient segments, particularly in respect of the British, French and German markets, are as follows: -

➤ **Culturally Curious**

- Tend to be middle aged (35 – 54);
- Likely to travel as a couple or with other adult friends;
- Want to broaden their minds and expand their experiences through landscape, history and culture;
- Curious and keen to learn about the places that they travel to;
- Independent active sightseers;
- Want to encounter new places and out-of-the-ordinary experiences.

➤ **Great Escapers**

- Tend to be younger (25 – 45);
- Often couples, some with young children, or travelling with friends and older family members;
- Need time out from busy lives and careers;
- Specially interested in rural holidays.

➤ **Social Energisers**

- The youngest target segment, primarily aged under 35;
- Like to holiday in groups or as couples;
- Look for places that are new, different, and vibrant.

Each of these segments are important to those marketing Ballyhoura Country as their holiday needs are authenticity, exploration and discovery, connecting with nature, getting off the beaten track, connecting with people, beautiful landscapes, engaging in active pursuits, fun and enjoyment, and lots to do in a small area – they want to pack everything in.

1.3. Review of Tourism Performance in Ireland

Tourism in Ireland increased steadily throughout the nineties and the early years of the new millennium, peaking in 2007 with total tourism revenue estimated at €6.5 billion based on 7.7 million overseas visitors and 7.9 million domestic tourist trips. As a result of the recession caused by the global economic decline in December 2007, Irish tourism declined from 2008 to 2010 and despite some modest recovery since 2011, tourism levels remain well below the 2007 peak.

Nos (000s)										
Revenue (€m)	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Overseas Tourism (000s)	6,178	6,384	6,763	7,417	7,739	7,435	6,578	5,945	6,240	6,286
Overseas Revenue (€m)	3,228	3,235	3,487	3,809	3,945	3,849	3,420	2,999	2,919	2,956
Domestic Tourism (000s)	6,657	7,001	7,173	7,310	7,942	8,339	8,340	7,300	7,169	7,031
Domestic Revenue (€m)	971	1,037	1,165	1,375	1,551	1,546	1,390	1,561	1,416	1,345
Tourism Revenue (€m)	5,028	5,102	5,437	6,082	6,453	6,327	5,361	5,164	5,293	5,387

Source: CSO/Fáilte Ireland

Preliminary indications for 2013 show that the recovery in tourism performance in Ireland is continuing, with overseas visitors to Ireland up an estimated 7% to 6.7 million visitors and overseas revenue up almost 12% to €3.3 billion. Total domestic trips in 2013 are up a more modest 1% to 7.1 million with domestic revenue up 2% to €1.4 billion. *Preliminary overseas and domestic trip estimates are based on **all** trips taken to and within Ireland, and not just holiday trips.*

1.3.1. Tourism Performance in 2012

Ireland received 6.3 million overseas visitors in 2012 and they spent almost €3 billion. A further 1.3 million staying visitors arrived from Northern Ireland and Republic of Ireland residents took 7 million overnight trips. Total spend from staying visitors from Ireland north and South was estimated at €1.6 billion. In total, tourism to and within Ireland accounted for 14.6 million staying visits and generated €5.4 billion (*including receipts paid to Irish sea and air carriers*), representing 4.1% of gross National Product in revenue terms and contributing €1.3 billion to Government revenue through taxation.

Tourism in 2012	Staying Visits (000s)	Expenditure (€millions)
Overseas Visitors	6,286	2,956
Northern Ireland Visitors	1,264	284
Domestic Visitors	7,031	1,345
Total Visitors	14,581	4,585
<i>Carrier Receipts</i>		767
Total Revenue		5,352

Source: CSO/Fáilte Ireland

Preliminary results for 2013

Preliminary indicators are that overseas visits to Ireland increased by almost 7% in 2013 resulting in an estimated 6.7 million visits, due mainly to strong double-digit growth from North America and other long haul markets due in part to the positive response to the “**Gathering**” initiative. British and Mainland European visitor numbers grew by 6% and 4.5%, respectively.

Domestic trips and spend in 2013 are estimated to have increased by 1% and 2%, respectively to 7.1 million trips and €1.37 billion.

Total revenue from overseas visitors increased by almost 12% to €3.3 billion.

Overseas Visitors	2013(p)	% Change vs. 2012
Britain (000s)	2,885	+6%
Revenue (€m)	889	+4%
M Europe (000s)	2,349	+4.5%
Revenue (€m)	1,228	+16%
N America (000s)	1,041	+11%
Revenue (€m)	825	+11%
Other Overseas (000s)	432	+14%
Revenue (€m)	363	+24%
Total Overseas (000s)	6,708	+7%
Revenue (€m)	3,304	+12%
Domestic Trips (000s)	7,111	+1%
Revenue (€m)	1,373	+2%

Preliminary Estimates of Overseas Visitors to the Regions in 2013

Preliminary estimates for overseas visitors to the regions in 2013 indicate that overseas visits to the South-West region increased by 4% to 1.85 million with revenue up 9% to €615 million, visits to the Shannon region increased by 9% to 0.94 million with revenue up 15% to €254 million, while visits to the South-East region increased by almost 1% to 0.8 million, however revenue declined by 11% to €207 million

Overseas Visitors to Regions	2013(p)	% Change Vs. 2012
South-West (000s)	1,851	+4%
Revenue (€m)	615	+9%
Shannon (000s)	943	+9%
Revenue (€m)	254	+15%
South-East (000s)	798	+1%
Revenue (€m)	207	-11%

1.3.2. Regional Distribution of Staying Visitors in 2012

For Ballyhoura Country the key segment of the overseas visitor market is the holiday market staying in paid accommodation, and in particular those interested in activities such as hiking/walking and cycling, heritage and culture, and the rural environment.

Ballyhoura Country straddles the Limerick/Cork border and its main catchment area is visitors to the Shannon and the South-West regions, and there is also potential from those visiting Tipperary South in the South-East region.

In 2012 the impact of overseas visitors to these regions was as follows: -

Nos (000s) Revenue (€m)	Overseas	Nth Ireland	Domestic	Total Staying Visitors
South-West	1,779 563	49 22	1,403 312	3,231 896
Shannon	867 221	8 2	673 121	1,548 345
South-East	792 232	59 6	991 180	1,842 418
Any South-West/ Shannon/South-East	2,649	n/a	n/a	n/a

Source: Fáilte Ireland/TDI

A visit to a region is defined as a visitor spending at least an overnight in the region. Visitors can stay in more than one region during their stay in Ireland, so the numbers visiting ANY of the above regions is less than the sum of the regional visits.

The above numbers are indicative of the primary potential for Ballyhoura as most of these visitors, other than those specifically visiting major urban centres such as Limerick, Cork, Kilkenny or Waterford, would fit the profile of potential visitors to Ballyhoura. In respect of overseas visitors to Ireland, an estimated 42% spent at least a night in either the South-West, Shannon or South-East regions, more than 2.6 million overseas visitors.

This potential can be refined further for overseas visitors based on those staying at least an overnight in counties Cork, Limerick and South Tipperary. It is estimated one in four overseas visitors spent at least one night in either Cork, Limerick or south Tipperary, equivalent to almost 1.6 million overseas visitors.

Overseas Visitors to Counties in 2012					
Nos. (000s) Revenue (€m)	Total Overseas	Britain	M Europe	Nth America	Other Areas
Cork	1,228 399	499 127	445 142	221 110	63 19
Limerick	391 116	174 40	117 30	87 40	14 6
Tipperary South	124 39	62 18	33 14	21 6	8 1
Any Cork/Limerick/ Tipperary South	1,584	720	512	271	81

Source: Fáilte Ireland/TDI

As stated earlier, the most realisable segment of this potential market for Ballyhoura are those visitors whose main purpose for visiting the Region/County is a holiday, vacation or leisure break. The holidaymaker numbers in 2012 for any visit to the regions or counties are as follows: -

Overseas Holidaymakers in 2012					
Regions	Total Overseas	Britain	M Europe	N America	Other Areas
Any South- West/Shannon/South- East	1,536	500	532	418	85
Any Cork/Limerick/ Tipperary South	842	286	308	200	49

Source: Fáilte Ireland/TDI

More than 1.5 million overseas holidaymakers, 53% of all holiday visitors from overseas, stayed at least one night in the wider catchment area of the South –West, Shannon and South-East regions. Mainland Europe and Britain were the main markets each contributing more than half a million holidaymakers with North America only slightly behind at 418,000.

The more tightly defined catchment of counties Cork, Limerick and South Tipperary accommodated 842,000 of these overseas holidaymakers, with Mainland Europe again the major contributor, followed by Britain and North America, respectively. Overall, three in ten of all overseas holiday visitors spent at least one night in the counties surrounding Ballyhoura.

1.4. Overseas Visitors to Ireland

Britain, at 2.7 million visitors, accounted for 43% of all overseas visitors to Ireland in 2012, and a spend of €858 million accounted for 29% of total overseas visitor expenditure.

Mainland Europe provided 2.2 million visitors, 36% of all overseas visitors, with Germany (437,000) and France (384,000) the strongest performing markets followed by Italy (240,000) and Spain (239,000). Overall, visitors from Mainland Europe spent €1.1 billion while in Ireland, 36% of overseas visitor spend. *Visitors from Mainland Europe stay longer than those from Britain and thus have a higher per capita spend.*

North American visitors reached 940,000 in 2012, 15% of all overseas visitors, of whom 833,000 were from the United States. These North Americans spent €746 million while in Ireland, 25% of total overseas visitor spend, and are the most lucrative of tourists to Ireland in terms of per capita spend.

Other long haul markets contributed the remaining 378,000 overseas visitors and spent €292 million in Ireland in 2012.

Overseas visitors to Ireland in 2012 generated almost 49 million nights, with almost 60% of these nights spent in paid accommodation. Visitors stayed in Ireland for almost 8 nights on average and overall per capita spend was €470, while the average spend per day was €60. The average stay of British visitors is reduced somewhat due to the significant number of short breaks taken, particularly Dublin breaks, however their per diem spend is slightly above average. In contrast, visitors from Mainland Europe stay longer, due in part to longer staying language students, however this does reduce the average spend per day.

Market	Visitors (000s)	Expenditure (€millions)	Nights (000s)	Average Nights	Per Capita Spend (€)	Per Diem Spend (€)
Britain	2,722	858	13,800	5.1	315	62
M. Europe	2,247	1,060	21,300	9.5	472	50
Nth America	940	746	8,800	9.4	794	85
Other Areas	378	292	4,900	13.0	772	60
Total Overseas	6,286	2,956	48,800	7.8	470	60

Source: CSO/Fáilte Ireland

Profile of British Holidaymakers

- Ireland's most important market in terms of holidaymaker numbers and revenue.
- Most likely to travel in the off-peak season.
- Most likely market to travel to Ireland by sea with a car (25%).
- Almost three-quarters stay for a short break of 1 to 5 nights in Ireland.
- Hotels are the most popular form of accommodation, reflecting the popularity of shorter breaks.
- Dublin and the South-West are the most popular regions visited and they are least likely to visit more than one region.
- More than nine in ten use the internet to book part of their holiday trip.
- One-third are visiting Ireland for the first time.
- More than two-thirds are aged over 35 years and one in four travel alone.
- Almost half are Sightseers and Culture Seekers.
- One-third are from London and the South East.

Profile of French Holidaymakers

- More than two-thirds arrive between May and September.
- More than one in five arrives by sea.
- Typically stay for 8 nights.
- Guesthouse or B & B is the most popular form of accommodation.
- More than two in five hire a car in Ireland.
- Four in five use the internet to book some element of their trip.
- Almost two-thirds are on their first visit to Ireland.
- French holidaymakers are most likely to visit with a partner or spouse and they are more likely to visit parts of Ireland other than Dublin.
- Hiking/Walking is the most popular activity making France a key target market for Ballyhoura.
- Most French holidaymakers are from the Paris region, the West and the South East.

Profile of German Holidaymakers

- Third most important Holiday market for Ireland after Britain and the United States.
- Two-thirds arrive between May and September.
- The average length of stay in Ireland is almost 9 nights.
- Hotels, guesthouses and B & Bs are the most popular forms of accommodation, used by half of German holidaymakers.
- Dublin, South-West and the West are the most popular regions visited.
- 60% booked some element of their holiday in Ireland online.
- Two-thirds are on their first visit to Ireland.
- More than half are aged under 35 years.
- Hiking/Hill walking is a popular activity making the German market a key target for Ballyhoura.

Profile of United States Holidaymakers

- The United States is the second most important market for Ireland in terms of holiday numbers and revenue.
- Almost half arrive during the summer months June to August; overall 70% arrive between May and September.
- Most stay for 7 nights in Ireland.
- Hotels are the most popular form of accommodation used by half of US holidaymakers.
- US holidaymakers are most likely to visit more than one region while in Ireland with Dublin, South-West and the West the most popular destinations.
- They are most likely to hire a car while in Ireland.
- US holidaymakers are the most likely to be on a package holiday (33%) and the least likely to book online (29%)

- Seven in ten are on their first visit to Ireland.
- More than eight in ten US holidaymakers are Sightseers and Culture Seekers.

The above profiles reveal that most arrivals are between May and September, many elements of the holiday are booked online, paid serviced accommodation is most popular, Hiking/hill walking is the most popular active pursuit, and most holidaymakers are visiting Ireland for the first time. This last point highlights a critical issue for Irish tourism – the need to generate new tourism business each year in order to maintain growth in the sector. The quality and uniqueness of Ireland's product offering is key to increasing the proportion of repeat holidaymakers.

1.4.1. Overseas Visitors engaging in Activities

A core potential for Ballyhoura is visitors to Ireland who engage in activities such as Hiking/Hill Walking, Cycling (including a niche potential for Mountain Biking) and Equestrian Pursuits.

The number of overseas visitors engaging in these activities in 2011 was as follows: -

Overseas Participants (000s)	Visitors	Holidaymakers	% of Holiday Visiting South-West/ Shannon/ South-East
Hiking/Hill Walking	763	551	74%
Cycling	175	105	74%
Equestrian Pursuits	71	41	68%

Source: Fáilte Ireland/TDI

Focussing on the “promotable” holiday visitors, Hiking and Hill Walking is by far the most significant activity attracting more than half a million overseas visitors, while the numbers engaging in Cycling and Equestrian Pursuits are 105,00 and 41,000, respectively. The proportion of these overseas holiday visitors visiting the primary target for BallyHoura, the South-West, Shannon or South East regions, was an impressive 74%, more than 400,000 Hiking/Hill Walking holidaymakers.

The area also performs very well in respect of cycling and Equestrian Pursuits accounting for 74% and 68%, respectively, of all holiday participants. These figures confirm the importance of these active pursuits in attracting potential overseas visitors to Ballyhoura.

Profile of Overseas Visitors who engaged in Hiking/Hill Walking

- 763,000 visitors in 2011, including more than half a million holiday visitors, and an estimated total spend in Ireland of €660 million.
- Four in ten of these visitors/holidaymakers were from Mainland Europe, with a third from Britain and one in five from North America.
- Three-quarters arrive in Ireland between May and September and they stay for more than 10 nights on average.
- Almost six in ten are first-time visitors to Ireland and are travelling by car.

- The south-West is the most popular region for engaging in Hiking/Hill Walking attracting almost half of all visitors.
- Eight in ten stay in paid accommodation, more than half of whom stayed in hotels or guesthouses/B & Bs.
- 60% of their total spend was on bed and board and other food and drink.
- Nine in ten are either Managerial/Professional (AB) or White Collar workers (C1), two-thirds travel either alone (23%) or as a couple (44%) while only 17% are families.
- One in four is aged between 25 and 34 years while four in ten are aged between 35 and 54 years.

Profile of Overseas Visitors who engaged in Cycling

- 175,000 visitors in 2011, more than half of whom (105,000) were holiday visitors, and an estimated spend of €200 million.
- Half of these visitors/holidaymakers were from Mainland Europe, one in four holidaymakers were from the United States.
- 79% arrive in Ireland between June and August and stayed for two weeks on average.
- Two-thirds are on their first visit to Ireland.

- Almost half use a car while in Ireland and the West and South West were the most popular regions for cycling
- One-third stay in hotels, guesthouses or B & Bs while a third also stayed in rented accommodation or hostels.
- Two-thirds of all expenditure while in Ireland was on bed and board and other food and drink.
- Nine in ten are either Managerial/Professional (AB) or White Collar workers (C1), two-thirds travel either alone or as a couple, while only 15% are families.
- More than half are aged between 16 and 34 years.

Profile of Overseas Visitors who engaged in Equestrian Pursuits.

- 71,000 visitors in 2011, more than half of whom (41,000) were holidaymakers, and an estimated spend in Ireland of €79 million.
- More than half were from Mainland Europe, with one in four from the United States.
- More than eight in ten arrived in Ireland between April and August and stayed for two weeks on average.
- More than half are on their first visit to Ireland.
- Two-thirds travel by car while in Ireland and the South-West is the most popular region.
- Almost half stay in hotels, guesthouses and B & Bs.
- Almost two-thirds of their total spend in Ireland is on bed and board and other food and drink.
- Nine in ten are either Managerial/Professional (AB) or White Collar workers (C1), almost four in ten travel as a couple and 28% are families.
- Six in ten are aged between 25 and 54 years.

Summary

In overall terms, hiking and hill walking is the most popular active pursuit and the South West in the most popular region for overseas holidaymakers engaging in activities. Most activity occurs between May and September and Mainland Europe contributes the most participants. Travel by car is popular, as is staying in paid, serviced accommodation. Nearly all participants in active pursuits are from the higher socio demographic groups and most are travelling as couples or alone with a low representation of families except in respect of equestrian pursuits.

1.4.2. Overseas Holidaymakers Visiting Places of Historical and Cultural Interest

Overseas holidaymakers who visit places of historical and cultural interest while in Ireland are another potentially important segment for Ballyhoura.

In 2011 2.2 million overseas holidaymakers engaged in the activity, with historic houses and castles, monuments, Museums and Art Galleries and Heritage or Interpretative centres being most frequently visited. Because of the popularity of the activity, the profile of participants mirrors very closely the profile of all holidaymakers to Ireland.

Dublin is the most popular region, visited by 77% of participants. Outside of Dublin the South-West is the most popular region visited by 44%, followed by the West (34%), Shannon (22%) and the South-East (18%).

1.4.3. Profile of Overseas Visitors to the Ballyhoura Area

The following profile of overseas visitors to the Ballyhoura area is based on data from the **Fáilte Ireland Survey of Overseas Travellers**. The profile is based on overseas visitors who *spent at least one overnight* in the Ballyhoura area during the three years 2010 to 2012. Over these three years Fáilte Ireland interviewed a total Of 384 overseas visitors who spent at least an overnight in the Ballyhoura area. Visitors from Mainland

Europe were the largest cohort with 169 interviews, followed by 120 British visitors, 79 visitors from North America, and 16 visitors from the rest of the world. The total includes 170 holiday visitors and again the largest cohort is from Mainland Europe with 82 holidaymakers. The survey data includes interviews with 63 North American holiday visitors, but only 16 British holidaymakers as three in four British visitors to Ballyhoura are mainly there to visit family and/or friends.

The analysis of sample for the following analysis is as follows: -

2010 - 12	Total	Britain	N America	M Europe	Other Areas
Visitors	384	120	79	169	16
Holiday	170	16	63	82	9

The Visitor numbers above include the Holiday visitors.

The above figures show the number of *unweighted* interviews achieved by the survey. the results of the survey are weighted to represent the number of overseas visitors to Ireland by country of residence, and when the appropriate weights are applied to the above, the distribution of the sample by country of residence is as follows: -

Weighted Distribution	Total	Britain	N America	M Europe	Other Areas
Visitors	100%	39%	30%	26%	5%
Holiday	100%	12%	57%	26%	5%

The above shows that whereas 39% of all visitor interviews were with British visitors, they account for only 12 % visitors. North America accounts for 57% of holiday interviews.

Based on the number of interviews with visitors to Ballyhoura highlighted above, the following profile is based on total visitors and those from Britain, North America and Mainland, and on total holiday with further reference to holidaymakers from North America and Mainland Europe.

Purpose of Visit

The main purpose of visit to Ireland for those who spent at least an overnight in Ballyhoura was as follows.

Main Purpose (%)	Total	Britain	N America	M Europe	Other Areas
Holiday	42	13	80	43	37
Visiting Friends/Relatives	44	75	16	32	42
Business	9	7	2	18	13
Other Reasons	5	5	2	7	8
Total	100	100	100	100	100

Holiday visits account for 42% of all overseas visits to Ballyhoura, with North America the highest at 80%. Visiting friends and/or relatives account for 44% of all visits due to the strength of this cohort among British visitors to the area (75%). Somewhat surprisingly, a third of visitors from Mainland Europe are also visiting family and/or friends.

The proportion of holiday visits increases to 63% of all visits when secondary reasons for visiting Ireland are taken into account, due to the significant proportion of British visitors mentioning holiday as an additional reason for their visit.

All reasons (%)	Total	Britain	N America	M Europe	Other Areas
Holiday	63	46	90	58	55
Visiting Friends/Relatives	52	81	27	41	44
Business	9	7	2	18	13
Other Reasons	7	8	5	8	8

Type of Holiday

Two-thirds of holiday visitors to Ballyhoura were touring by car and using paid accommodation, 17% were defined as *activity specialists*.

The most popular type of holiday mentioned by 70% of all holiday visitors was *the opportunity to explore Ireland's sights and to find out about the culture*. Some way back at 13%, the second most mentioned type of holiday was *being with family and/or loved ones*. This type of holiday was particularly mentioned by British visitors for whom the holiday was a secondary reason for their visit.

The only other type of holiday to receive a significant mention (7% of visitors) was *the opportunity to relax and get away from things*.

Length of Stay in Ireland

The average length of stay in Ireland for overseas visitors who stayed in Ballyhoura was 9 nights. Visitors from Mainland Europe stayed longest in the country at 14 nights, while North American visitors stayed for more than 8 nights and British visitors for almost 7 nights on average.

Average Nights	Overseas Visitors	Overseas Holiday
Total	9.2	9.2
Britain	6.8	na
North America	8.4	8.4
Mainland Europe	13.9	11.1

of accommodation were surprisingly popular among European visitors at 19% of nights, probably reflecting the longer staying language students.

It is not possible from the data to determine the average nights spent in the Ballyhoura area, but it is indicative that 61% of all nights spent in Ireland were in counties Cork and Limerick (37% in Cork and 23% in Limerick). Similarly 49% of all holiday nights in Ireland for this cohort were spent in counties Cork and Limerick (22% in Cork and 27% in Limerick). The preference for County Cork among overseas visitors is due to visitors from Britain, mainly VFR, and Mainland Europe, whereas the preference for Limerick among overseas holidaymakers is due to the strength of North America.

Accommodation Used and Nights

The most popular type of accommodation used by all visitors at 47% was staying in the house of a friend/relative, due to the extent of usage by British visitors at 72%. Hotels were used by 38% of all visitors and 72% of North Americans. B & Bs and Guesthouses were used by one in four of all visitors, 40% of North Americans and 29% of visitors from Mainland Europe. Hotels and B & Bs were more or less equally popular among mainland Europeans, however a surprising 41% used houses of friends/relatives.

In terms of nights, houses of friends/relatives accounted for 36% of all visitor nights, with 19% spend in hotels and 14% in B & Bs and guesthouses. British bednights were predominantly spent in friends/relatives houses (71%), North American visitors primarily spent their nights in hotels (47%) or in B & Bs and guesthouses (25%), while Mainland European visitors favoured friends/relatives houses (22%), rented accommodation or holiday homes (each 14%), or B & Bs and guesthouses (11%). Other types

Overseas Visitor Accommodation	Visitor Usage %				Visitor Nights %			
	Total	Britain	North America	M Europe	Total	Britain	North America	M Europe
Hotels	38	14	72	32	19	7	47	9
B & Bs/ Guesthouses	26	11	40	29	14	6	25	11
Caravan/Camping	2	*	2	7	4	*	*	9
Hostel	3	1	3	7	2	*	2	4
Rented	6	3	8	8	9	6	6	14
House of friend/ relative	47	72	20	41	36	71	18	22
Holiday home	3	4	2	3	8	7	2	14

*Indicates less than 0.5%

Holiday visitor usage was heavily weighted towards hotels (57%) and B & Bs and Guesthouses (47%). Hotels are the dominant accommodation type for North American holidaymakers (72%) while Mainland European holiday visitors show a preference for B & Bs and guesthouses (49%).

Hotels account for 35% of all holiday bednights, including 52% of North American holiday bednights, while B & Bs and guesthouses account for 28% of all holiday bednights. Caravan and camping facilities were popular with Mainland European holidaymakers, accounting for 25% of bednights.

Overseas Holiday Accommodation	Holidaymaker Usage %			Holidaymaker Nights %		
	Total	North America	M Europe	Total	North America	M Europe
Hotels	57	72	31	35	52	16
B & Bs/ Guesthouses	47	44	49	28	28	28
Caravan/Camping	6	2	15	8	*	25
Hostel	6	3	12	4	3	7
Rented	7	6	11	5	5	16
House of friend/ relative	11	8	15	12	10	11
Holiday home	3	2	3	6	2	5

*Indicates less than 0.5%

Activities Engaged in

Hiking/Cross-country walking was the most popular activity engaged in by overseas visitors at 15%. Golf was the choice of 7% and 4% engaged in cycling. Fishing and equestrian pursuits were engaged in by 2% and 1% of overseas visitors, respectively. Hiking/Cross-

country walking was particularly popular among Mainland European visitors (27%), and golf was the popular activity for North Americans (16%).

More than half of those who engaged in golf (rising to two-thirds of North Americans) stated that it was the golf in Ireland that led

to their choice of holiday destination. Similarly, 30% of those who engaged in cycling and 24% of the hikers/walkers said that the opportunity to engage in the activity led to their choice of Ireland as their holiday destination.

Activities Engaged in (%)

Overseas Visitors	Total	Britain	North America	Mainland Europe
Fishing	2	2	0	4
Equestrian Pursuits	1	0	2	3
Cycling	4	7	2	4
Golf	7	5	16	1
Hiking/Cross-country walking	15	11	13	27

Despite the fact that most British visitors were visiting family and/or friends, they still make time to engage in active pursuits while in Ireland.

Destinations visited in Ireland

Overseas holiday visitors who spent at least an overnight in Ballyhoura also spent nights in other destinations throughout the country. More than half spent at least a night in Dublin and its environs, reflecting both the popularity of the destination and the importance of Dublin as a point of access to the country. Other popular destinations with visitors to Ballyhoura were the Ring of Kerry, West Clare, Connemara and the Dingle Peninsula. The attributes shared by these destinations are the beauty of scenery, the unspoilt nature of the environment, and the fact that they are predominantly rural destinations. This is a good indicator of the attributes that attract overseas visitors to Ballyhoura.

Destination visited (%)

Overseas Holiday	Total	North America	Mainland Europe
Dublin/Dublin's Doorstep	53	52	57
Ring of Kerry	32	31	43
West Clare	24	27	27
Connemara	24	17	39
Dingle Peninsula	21	24	24
Cork City	16	15	19
South East	15	10	24
Shannon Corridor	10	10	9
West Cork	9	3	21
Donegal/Sligo	4	1	12

Mainland European holiday visitors were the most travelled visitors registering the highest numbers of visits to all regions except, ironically, the Shannon Corridor.

Package or Independent Travellers

Almost two-thirds of overseas holiday visitors made independent travel arrangements when visiting Ireland with 36% travelling on a package. Among North American holiday visitors it was almost 50/50 package vs. Independent, whereas 84% of Mainland European holidaymakers were independent travellers.

% of Overseas Holiday	Total	North America	Mainland Europe
Package/ Inclusive	36	49	16
Independent	64	51	84

Ethnic Links and Experience of Ireland

More than half of overseas holiday visitors to Ballyhoura had no ethnic links with Ireland, and while 6% were born in Ireland a further 38% claimed ethnicity through either their parents, grand-parents or other ancestors. Among North American holiday visitors six in ten claimed ethnic links with Ireland with 6% again born in Ireland and 54% claiming other ethnic links, whereas 94% of Mainland European holidaymakers had no ethnic links with Ireland.

Ethnic (%)	Total Holiday	North America	Mainland Europe
Irish born	6	6	4
Ethnic links	38	54	2
No links	56	40	94
Experience Of Ireland (%)			
First visit to Ireland	60	65	61
Repeat visitor	40	35	39

When Irish born holiday visitors are excluded, three in every five overseas holidaymakers were on their first visit to Ireland; the remaining 40% were repeat visitors. Two-thirds of North American holiday visitors were on their first visit as were 61% of Mainland Europeans.

Overseas Holidaymaker Demographics

Seven in ten overseas holiday visitors to Ballyhoura were married or co-habiting, 30% were single, widowed, divorced or separated. Only a quarter had dependent children. One in five were travelling alone, 42% were travelling as couples, one in four were families (one in three North Americans), and the remaining 13% were travelling in adult parties. Those aged between 35 and 54 years were the most common cohort (43%), 31% were aged 55 and over, and 26% were under 35 years.

Marital Status (%)	Total Holiday	North America	Mainland Europe
Married/C o-habiting	70	63	73
Single	30	37	27
Dependent Children (%)			
Yes	23	22	23
No	77	78	77
Party Composition (%)			
Travelling alone	21	20	25
As a couple	42	34	48
Family	24	33	16
Other adult party	13	13	11
Party Ages (%)			
Up to 34 years	26	29	27
35 – 54 years	43	42	48
55 years and over	31	29	25

More than four in five overseas holiday visitors were in the Managerial/Professional (AB) or White Collar (C1) social class groups, 15% were Skilled Workers (C2) and only 4% were in the Unskilled (DE) group.

Social Class (%)	Total Holiday	North America	Mainland Europe
Managerial/ Professional	40	41	34
White Collar	41	38	57
Skilled Workers	15	19	8
Unskilled Workers	4	2	*

*Indicates less than 0.5%

Expenditure

Whereas tourist expenditure in any survey must be interpreted with caution, the Fáilte Ireland survey indicates that overseas visitors who stayed at least a night in Ballyhoura spent a total of €641 per visitor while in Ireland, equivalent to a per diem spend of €69. It is not possible from the survey data to estimate what proportion of the total per capita spend of €641 was spent in the Ballyhoura area. The recent study of visitors in Ballyhoura conducted by the Limerick Institute of Technology estimated an average spend of €170 for overseas visitors in 2012. At face value this would suggest that just 27% of overseas visitors' total spend while in Ireland was attributable to Ballyhoura. In the absence of any estimate of how many of the 9 nights on average that visitors spent in Ireland were actually spent in Ballyhoura it is not possible to verify this figure but the estimate of 27% of total expenditure does seem low.

The average expenditure estimate of €641 per overseas visitor is based on a three year average; however inflation is unlikely to have had a significant effect during the period 2010 to 2012.

Expenditure (€)	Total	Britain	N America	M Europe	Other Areas
Per Capita	641	382	906	645	984
Per Diem	69	56	107	46	135

The above shows that average per capita spend can vary considerably by market, so the overall average expenditure resulting from any survey will be heavily dependent on the mix of respondents by country of residence.

The breakdown of expenditure by type of spend for overseas visitors staying in Ballyhoura was as follows: -

% of Total Spend	Total Visitors	Britain	North America	Mainland Europe
Bed and Board	25	13	29	29
Other food and drink	35	47	31	33
Sightseeing/Entertainment	7	5	9	6
Transport in Ireland	14	13	12	17
Tourist shopping	16	16	16	14
Miscellaneous	3	6	3	1

Bed and board and the purchase of *other food and drink* accounted for 60% of total overseas visitor spend. The lower proportion of British visitor spend on *bed and board* (13%) reflects the greater use of the houses of friends and/or relatives while in Ireland. Overall, 16% of visitor expenditure was on *tourist shopping* and 14% was on *transport in Ireland*. Only 7% of total spend was on *sightseeing and entertainment*.

Value for Money

Visitor perceptions of the value for money available in Ireland continue to be critical with 40% of overseas visitors finding that value was *very good* or *good* while 29% considered the value on offer to be *poor* or *very poor*. Visitors from North America were the most positive with more than half regarding the value for money in Ireland *very good* or *good*. Visitors from Mainland Europe were also quite positive on balance, whereas British visitors were the most critical with 40% complaining that value for money was *poor* or *very poor*.

Value for Money (%)	Total Visitors	Britain	North America	Mainland Europe
Very good	10	8	14	8
Good	30	17	41	34
<i>Very good/Good</i>	<i>40</i>	<i>25</i>	<i>55</i>	<i>42</i>
Fair	31	35	25	34
Poor	21	31	11	20
Very poor	8	9	9	4
<i>Poor/Very poor</i>	<i>29</i>	<i>40</i>	<i>20</i>	<i>24</i>

1.5. Review of Domestic Tourism Performance

The domestic tourism market in Ireland has declined in recent years as the impact of the recession has taken its toll on consumer confidence. Domestic holidays reached an all time high of 4.4 million trips in 2008, the first year of the recession, but levels have declined in each of the past four years with 3.4 million holiday trips recorded in 2012. Spend on domestic holidays has declined correspondingly and the value was estimated at €785 million in 2012. Not surprisingly, longer domestic holidays of four or more nights have been worst affected by the recessionary impacts.

Nos (000s) Rev (€m)	2008	2009	2010	2011	2012
Total Trips	8,339	8,340	7,300	7,169	7,031
Holiday Trips	4,389	4,037	3,978	3,696	3,374
- Long (4+ nights)	1,150	1,104	1,151	1,040	780
- Short (1-3 nights)	3,248	2,933	2,828	2,656	2,594
Total Revenue	1,546	1,390	1,561	1,416	1,345
Holiday Revenue	1,028	843	972	865	785
- Long (4+ nights)	429	373	394	349	291
- Short (1-3 nights)	599	471	578	516	494

Source: CSO

Preliminary indicators of performance in 2013 suggest a modest increase in domestic holiday taking of up to 2%.

In 2012 two-thirds of Irish adults took a holiday in Ireland including half the population who took a short break of one to three nights. Almost half booked their holiday online while 40% booked by telephone.

The South-West region remains the most popular destination for domestic holidays accounting for 22% of holiday trips and 27% of all holiday nights. The South-East and West regions are also popular.

Regions visited on Domestic Holidays	% of Holiday Trips	% of Holiday Nights
Dublin	15	12
East & Midlands	12	8
South East	18	18
South West	22	27
Shannon	10	10
West	16	17
North West	8	7

Source: CSO/Fáilte Ireland

Hotels account for 39% of all domestic holiday nights, reflecting the preference for short breaks and the extent of the special offers available to Irish consumers. Rented accommodation at 18% is also popular, particularly among those taking longer holidays and families, while there is little use of guesthouses or B & Bs (only 4% of holiday nights).

Travelling by car is the dominant method of transport used by domestic holiday takers (84%).

Two-thirds of all domestic holidays are taken between the months April to September. Short breaks are more evenly distributed with 41% taken between October and March. Hiking and walking is a popular activity among domestic holiday takers, with 22% engaging. Other active pursuits are somewhat less popular with cycling and equestrian pursuits attracting 9% and 3% of holiday takers, respectively. More passive pursuits such as visiting national parks, houses and castles, spa and heritage or interpretative centres are very popular with domestic holiday takers.

The main advantage of taking a holiday in Ireland is in avoiding the inconvenience of air or sea travel. Other advantages identified are the fact that there are a lot of things to see and do in Ireland and Irish holidays are perceived to represent good value for money. The main disadvantage of an Irish holiday is, not surprisingly, the possibility of poor weather. For some accommodation and food prices are perceived to be too expensive.

Ballyhoura has the activities and the attractions to attract the domestic holiday taker, however the limited hotel accommodation in the area can result in many taking a day trip rather than staying in the area. The recent Limerick Institute of Technology research study shows that the majority of domestic visitors to the Ballyhoura area were day trippers from the neighbouring counties. This is particularly so among those using the mountain biking facilities.

Despite the low take-up of guesthouses and B & Bs among domestic holidays generally, the less formal types of accommodation are popular with walkers so this segment remain a key potential for Ballyhoura.

1.6. Visitor Attitudes to Rural Ireland

Fáilte Ireland's survey of *Visitor Attitudes to Destinations* covers both overseas and domestic holiday visitors, and the following profile is based on feedback from those staying in the following destinations in 2012 - Shannon Corridor, West Cork, West Clare and Dingle Peninsula. These destinations were chosen as they are primarily rural in nature with physical characteristics similar to Ballyhoura. The exception to this is the coastal areas but this is common to all of the available destinations.

1.6.1. Holiday Visitor Attitudes

Why did they choose to come to the particular area?

For four in ten visitors it was the *beautiful scenery* that the destination offered, with this aspect particularly prevalent among Mainland Europeans. The second highest mention (13%) was to explore the *history and culture* of the area. One in ten visitors mentioned the opportunity to visit family and/or friends in the area and this was particularly mentioned by visitors from Britain (17%). *Recommendations* were mentioned by 7% and the availability of outdoor activities was the main reason for coming for 6% of overseas holiday visitors.

The attraction of beautiful scenery was also mentioned by one in four domestic holidaymakers, with the opportunity to visit family and/or friends (12%) and *previous visits* to the area (10%) the other main motivations.

Where did they first hear about the area? (Asked of overseas visitors only)

Word of mouth was the most frequent source of information about the area for almost a third of overseas visitors, closely followed by *guide books* (26%) and the *Internet* (18%).

Word of mouth was most common among British visitors while US visitors were most likely to reference guide books.

Did they seek information on the area before they left home?

Eight in ten overseas visitors sought information to help in the planning of their visit to the destination before they left their home.

In contrast, less than four in ten domestic holidaymakers sought information.

What information were they looking for?

Seven in ten overseas visitors sought information on *attractions and sights* in the area, while half looked for information on *general things to see and do*. Almost half (45%) sought practical information on *accommodation in the area*. Other things mentioned were information on *Tours and activities* (24%), *maps of the area* (21%), *directions on how to get to the area* (17%) and *food and eating out* (10%).

Interestingly the information sought by the smaller proportion of domestic holidaymakers is very similar to the above with half seeking information on attractions and sights and accommodation, though with understandably less emphasis on directions and maps.

Where did they look for the information?

The main source of information for three in four overseas holiday visitors was the *Internet*, with just under half also mentioning guide books. *Travel Agents/Tour Operators* and the *Tourist Board* were mentioned by 13% and 10%, respectively.

Among domestic holidaymakers, 84% used the Internet while on in ten looked for information from the Tourist Board, guide books or through word of mouth recommendations.

Which websites did they use?

For both overseas and domestic holidaymakers the most visited websites were *general search engines* such as Google, mentioned by eight in ten overseas visitors and seven in ten domestic, followed by the

Tourist Board website and *local websites*. Local websites were accessed by 18% of domestic holidaymakers.

Did they seek information when they arrived in the area?

Almost two-thirds of overseas holiday visitors sought information after they arrived in the destination.

Conversely more than a third of domestic holidaymakers sought information.

What information did they look for?

The information sought after arriving is very similar to that sought before leaving home, *attractions and sights* (55%), *general thing to see and do* (39%), however *local maps*(33%) assumes greater importance whereas there is less emphasis on *accommodation*(9%). Information on *tours and activities*, *general directions* and *opening/closing times for attractions* were also important.

While less domestic holidaymakers seek information, among those who do the information requirements are very similar to those outlined above for overseas visitors.

Where did they get this information from?

Tourist Information Offices are the main source of local information for both overseas (70%) and domestic (59%) holidaymakers, followed by *accommodation providers* and the *Internet*. *Local people* such as taxi drivers, shopkeepers and publicans were mentioned by more than one in ten holiday visitors. The importance of accommodation providers and other local people highlights the importance of community involvement when looking after the needs of tourists at the local level.

Where did visitors eat while in the destination?

Pubs were the most popular place to eat mentioned by a third of overseas visitors, followed by *restaurants* (30%) and *hotels* (23%).

Hotels were the most popular place to eat for four in ten domestic holidaymakers, reflecting the popularity of hotel breaks among the domestic market, followed by restaurants

(28%) and pubs (20%).

What activities or events did they participate in while in the destination?

Hiking/cross-country walking was the most popular active pursuit engaged in by overseas holiday visitors (24%), significantly ahead of *cycling* (7%) and *Golf* (5%). A tiny minority engaged in *mountain biking* (1%) however this would probably be larger if the focus was on Ballyhoura rather than on the four destinations used in this analysis.

More than half of overseas visitors who engaged in hiking/cross-country walking rated the experience as *very good* while the remainder said it was good. Cycling was more critically rated with 37% say the experience was very good and 57 % rating it good. Two-thirds of those who played golf rated the experience as very good while the remainder said it was good.

Visits to heritage/interpretative centres was the most popular activity among overseas holiday visitors (43%), followed by visiting *historical houses/castles*(32%)and attending *traditional music/dance sessions* (21%). One in ten visited *national parks, gardens* or *museums/galleries*. Almost all rated the experiences as very good or good.

Hiking/cross-country walking was also the most popular active pursuit among domestic holidaymakers at 16%. Popular cultural pursuits were visits to heritage/interpretative centres, engaged in by 29%, visits to historic houses/castles (21%) and attending traditional music/dance sessions (16%).

Transport used to travel to and within the destination

Three-quarters of overseas holiday visitors used a car to travel to and within the destination, 22% used their own car and 55% used a hired car.

Nine in ten domestic holidaymakers used their own car.

Accommodation used at the destination

Almost six in ten overseas visitors (57%) stayed at least one night in a hotel while

visiting the destination, 43% used a guesthouse or B & B, while one in ten spent a night in a hostel or in rented accommodation. Hotels were used by 43% of domestic holidaymakers, 17% used rented accommodation while 14% used either a guesthouse (11%) or B & B (3%). 12% of domestic holidaymakers stayed with friends or family while in the destination.

How would you rate your experiences in the destination?

Overseas holiday visitors rated the *friendliness of local people* highest when considering their experiences in the destination with 73% rating this aspect as very good. The *natural environment* or *landscape* was the second rated aspect at 69% very good, followed by the *cleanliness of the locality* (48%), the *quality of buildings and architecture* (41%) and the *availability of things to see and do* (40%).

Overseas visitors were somewhat more critical of the *condition of roads, signposting and directions*, and *value for money*, however, very few considered these aspects of their visit to be poor.

The ratings given by domestic holidaymakers in respect of their experiences of the destinations were not significantly different from those of the overseas visitors detailed above.

How likely are they to recommend a holiday in the destination?

Both overseas and domestic holidaymakers are very likely to recommend a holiday in the area to others with no respondents saying that they are unlikely to recommend the area. The main reasons given for recommending the area are the beautiful scenery and the countryside (86%), the friendly, hospitable people (50%), the many attractions available (30%), the peaceful and relaxed atmosphere (27%), the history and culture (23%), and the many things to see and do in the area (20%).

In addition to the above, domestic holidaymakers would also recommend the area due to the fact that they have visited the destination before.

Among those holidaymakers who may have reservations with regard to recommending the area, the main issues are a perception that it is expensive and the possible poor weather.

1.7. Research Conclusions

The image of Ireland among potential visitors is of a country with beautiful scenery, friendly people, primarily rural and offering rest and relaxation. It is also a country with a unique culture and history, reflected in the people, the towns and villages, and in music and story-telling. It also provides an excellent environment for active pursuits such as hill walking, cycling and equestrian pursuits.

Ballyhoura represents a microcosm of this general offering in that it is typical, though not particularly distinctive. While nestling within counties Cork and Limerick, it lacks recognition of other regional offerings such as West Cork, the Blackwater valley, Bunratty, the Shannon River, or other destinations such as the Ring of Kerry, Dingle Peninsula or West Clare.

While the overall popularity of the South-West, Shannon and the South-East regions among both overseas and domestic holidaymakers offer a substantial potential for Ballyhoura to tap into, the lack of recognition or identification with the area means that it must work hard to achieve a share of the region's tourism. Ballyhoura is also inhibited by the limited accommodation stock available within the area. The real economic benefit from tourism is derived from bednights and not day trips.

Other relevant research conclusions are as follows.

- **Sightseers and culture seekers** are the main tourism potential for Ireland and Ballyhoura and it is estimated that there are 20 million potential tourists in Ireland's four main overseas markets.
- The segment is characterised by a sense of exploration, a willingness to engage,

and a desire for authentic new experiences.

- Typically they are ABC1, married and older. They tend to take many short breaks and longer rural holidays.
- Beautiful scenery and things to see and do are key considerations for a holiday in Ireland, also exploring small towns and villages and local history and culture.
- Word of mouth, the internet and guide books are key sources of holiday information.
- Britain remains Ireland's most important market for holiday numbers and revenue, and almost half are sightseers and culture seekers.
- Hiking/walking is the most popular activity among overseas holiday visitors, particularly those from France and Germany.
- The United States is Ireland's second most important holiday market, eight in ten are sightseer and culture seekers, and they are Ireland's most mobile tourists visiting the most regions.
- In 2011 more than half a million overseas holiday visitors engaged in hiking/hill walking while in Ireland and 74% visited the South West, Shannon and South East regions.
- Eight in ten overseas holidaymakers who engaged in hiking/hill walking used paid accommodation and 60% of their total spend in Ireland was on bed and board and food and drink.
- Also in 2011 2.2 million overseas holidaymakers visited places of historical and cultural interest while in Ireland.

Profile of visitors to Ballyhoura

- Holiday visits account for 42% of all overseas visits to Ballyhoura, with North America the highest at 80%. Visiting friends and/or relatives account for 44% of all visits due to the strength of this cohort among British visitors to the area (75%).
- Two-thirds of holiday visitors were touring by car and using paid accommodation, 17% were defined as *activity specialists*. The most popular type of holiday mentioned by 70% of all holiday visitors was *the opportunity to explore Ireland's sights and to find out about the culture*.
- The average length of stay in Ireland for overseas visitors who stayed in Ballyhoura was 9 nights. Visitors from Mainland Europe stayed longest in the country at 14 nights, while North American visitors stayed for more than 8 nights and British visitors for almost 7 nights on average.
- A third of all visitor nights were spent in hotels, guesthouses and B & Bs, and more than a third were spent in the houses of friends and/or relatives. More than seven in ten North American nights were spent in hotels (47%) and B & Bs and guesthouses (25%) while seven in ten British visitor nights were spent in friends/relatives homes.
- Two-thirds of overseas holidaymaker nights were spent in paid, serviced accommodation, rising to 80% of North American holiday nights. Less formal types of accommodation such as caravan/camping and rented accommodation were popular with Mainland European Holiday visitors.
- Hiking/Cross-country walking was the most popular active pursuit, engaged in by 15% of visitors, one of four of whom said that the walking led to their choice of Ireland as their holiday destination.
- Visitors to Ballyhoura also visited Dublin, the Ring of Kerry, West Clare, Connemara and the Dingle Peninsula.
- More than one-third of overseas holiday visitors (half of North Americans) travelled to Ireland on package or inclusive arrangements, two-thirds were independent travellers.
- More than half had no ethnic links with Ireland and 60% were on their first visit to Ireland.
- The majority of overseas holiday visitors (70%) are either married or co-habiting and 77% have no dependent children. Two-thirds travelled either as couples or families and 43% were aged between 35 and 54 years. Almost a third were aged 55 years and over. Eight in ten were either AB or C1 social class, that is managerial/professional or white collar workers.
- 60% of overseas visitor spend was on bed and board and other food and drink, 16% on tourist shopping and 14% on transport in Ireland.
- Four in ten overseas visitors considered the value for money in Ireland to be very good or good, however critically three in ten regarded value as poor or very poor.

Domestic Tourism Performance

- The South-West region remain the most popular destination for domestic holidays
- Hotels account for 39% of all domestic holiday nights reflecting the preference for short breaks and the special offers available to Irish consumers.
- Hiking and walking is a popular activity among domestic holiday takers with 22% engaging.

- Ballyhoura has the activities and the attractions to attract the domestic holiday taker, however the limited hotel accommodation in the area can result in many taking a day trip rather than staying in the area.
- Where visitors have reservations about the area the main issues are the perception that it is expensive and the weather.

Visitor Attitudes to Rural Destinations

- The primary motivations for visiting mainly rural destinations in Ireland are to experience the beautiful scenery and the local history and culture.
- The majority of visitors seek information on the destination to help in planning their visit. Word of mouth is the most frequent source of information, closely followed by guide books and the internet.
- Information sought is on attractions and sights in the area and general things to see and do. Practical information is also sought on accommodation, tours and activities, maps and directions and eating options.
- Tourist Information Offices are the main source of local information when the visitor is in the destination.
- The friendliness of local people is the aspect of the destination most highly rated by visitors, followed by the natural environment and landscape, the cleanliness of the locality, the quality of the buildings and architecture and the availability of things to see and do locally.
- Visitors are most critical of the condition of roads, signposting and directions and value for money.
- Visitors are very likely to recommend a holiday in the area due to the beautiful scenery, the friendly people, the attractions available, the relaxed atmosphere, the history and the culture, and the many things to see and do locally.

1.8. A Benchmark Estimate for Ballyhoura Tourism and Growth Target to 2020

The most recent study on the Ballyhoura area conducted by Limerick Institute of Technology suggests that the area attracted more than half a million visitors in 2012, resulting in a total spend in the area of €42 million. More than half of the total visits were day trips while staying visitors accounted for 262,000, of whom 184,000 stayed in paid accommodation and 78,000 stayed with friends or relatives (*this figure includes both overseas and domestic visitors but no breakdown is available*). Of the 184,000 visitors who stayed in paid accommodation, it is estimated that 97,500 were overseas visitors and 86,600 were domestic.

Tourism	Overseas	Domestic	VFR	Day Trips	Total Trips
Numbers	97,500	86,600	78,400	282,200	544,700
Expenditure (€m)	16.6	9.9	4.4	11.1	42.0

Note: the study calculated total expenditure by applying average per diem expenditure to the numbers in each category, without consideration of length of stay

Source: Assessing the economic contribution of tourism to the Ballyhoura area, Limerick Institute of Technology

TDI examination of Fáilte Ireland data shows the number of overseas tourists spending at least an overnight in counties Cork or Limerick, excluding VFR, is of the order of 1.09 million. Based on the LIT estimate for Ballyhoura of 97,500, this would suggest that Ballyhoura accounts for 9% of overseas visitors to the two counties. Given the number of visitors staying in Cork and Limerick cities, and the accommodation base in West Cork, this seems like a rather high estimate which would suggest that the above estimates for Ballyhoura are at the upper end of the range. This needs to be taken into account when setting forecasts for Ballyhoura to 2020.

A TDI analysis based on the inventory of paid accommodation in the Ballyhoura area, and excluding neighbouring locations such as Limerick city, Mallow and Castletroy, suggests 94 accommodation premises. Having made assumptions in respect of average beds available, seasonal opening, and occupancy rates for the South West based on Fáilte Ireland's accommodation survey, the following model has been developed for accommodation usage in the Ballyhoura area.

Accommodation Types	Number of Premises	Annual Beds Estimate	Average Occupancy (%)	Bednights Sold
Hotels	5	144,000	47	68,300
Guesthouses	1	18,000	41	700
B & Bs	28	84,000	24	20,200
Farmhouses	5	9,000	41	3,700
Self-catering	49	396,900	40	158,800
Holiday cottages	2	4,320	40	1,700
Youth Hostels	2	48,000	38	18,200
Caravan/Camping	2	162,000	29	47,000
Total	94	850,020		318,600

The assumptions employed in the above model, such as average beds per accommodation and seasonal opening times, are open to discussion, but based on the above, the estimated number of bednights sold in the Ballyhoura area would be 318,600. If we assume an average length of stay in Ballyhoura of between 1.5 and 3 nights, again subject to discussion and further analysis, the number of staying visitors in paid accommodation would be between 106,200 and 212,400.

If the above model is used in conjunction with the LIT study, it is apparent that the LIT figure of 184,000 staying visitors falls close to the mid-point of the range, though, as noted, this figure from the Accommodation Survey undertaken by Ballyhoura Fáilte must include visitors/guests staying more than a single night.

As shown in the top table in this sub-section, in converting overnight visitor, VFR and day tripper numbers to Ballyhoura into expenditure estimates, LIT use average daily expenditure without adjusting these for average length of stay. While the per diem spending figures for day trippers are valid, the average length of stay in the region by overnight visitors in paid accommodation and VFR visitors will be one or more nights.

TDI has prepared its own estimates of visitor spending in the Ballyhoura region in 2012 on the following basis:

Overseas overnights: 53% of overnight visitors found in the LIT survey to be from overseas (i.e. 106,200 at an average of 3 nights stay, or 212,400 average 1.5 nights stay) times average daily spending €69 (based on Fáilte Ireland survey data) times i.e. 0.53 share x 106,200 overnight visitors in paid accommodation x 3 days stay x €69 average daily spend = €11.65 million (NB same result emerges if taking higher volume of visitors for shorter length of stay).

The Fáilte Ireland average daily spending figure relates to alloverseas visitors to Ballyhoura including VFR and as such is too low for overseas visitors in paid accommodation. Estimating a figure between the €69 from the Failite Ireland analysis for all overseas visitors and the LIT figure of €170 is necessary but without primary research it is not possible to derive such a figure with certainty. For the purposes of this plan an average daily spending figure for overseas visitors to Ballyhoura in paid accommodation of between €80 and €100 has been estimated. Application of daily spending at the mid point of this range - €90 - would increase the base value of overseas visitors spending to €15.2 million.

Domestic overnights: 47% of overnight visitors found in the LIT survey to be domestic times average daily spending across both holiday and VFR visits and across both long and short holidays €50 (estimated from Fáilte Ireland survey data) i.e. 0.47 share x 106,200 overnight visitors in paid accommodation x 3 days stay x €50 average daily spend = €7.5 million.

VFR: the 78,400 VFR visitors (i.e. domestic and overseas) from the LIT study times 2.5 days average VFR trip duration (from CSO data) times LIT study average daily spend of €56 = €11.0 million

Day trippers: LIT survey data of 282,200 times average spend of €39 = €11.1 million
AGGREGATE VISITOR SPENDING BASE 2012 OF €44.8 MILLION (i.e. €15.2 + €7.5 + €11.1 + €11.0 million)

NB These calculations are based on a number of assumed conditions such as the applicability of domestic tourism data to Ballyhoura and the validity of some of the LIT survey findings and should be treated with due caution. However, they represent a base on which to develop forecasts of future growth both in tourist activity and economic impact

Need for an Accommodation Survey

Existing tourism statistics produced by the Central Statistics Office and Fáilte Ireland do not allow for the measurement of tourism in the Ballyhoura area. Existing overseas visitor statistics are available in a limited fashion at county level, while domestic tourism statistics are only available at a regional level. Whereas existing official tourism statistics can provide broad benchmarks for Ballyhoura, in order to more effectively measure tourism performance in the area it is recommended that a survey of accommodation premises be established on an annual basis, similar in concept to the study conducted in 2012 which established the estimate of 184,000 staying visitors used in the LIT study. The measurement of overseas and domestic visitors to Ballyhoura would thus be based on staying visitors in paid accommodation.

The most important factor in setting up a successful accommodation survey will be buy-in from the accommodation providers in Ballyhoura, and the role of Ballyhoura Fáilte will be critical in this regard. The effectiveness of the measure will be dependent on the level of participation that can be achieved in order to provide the best possible coverage of accommodation in the area. Information required from the survey will include:

- Rooms/Beds/units/pitches available
- Rooms/Beds/units/pitches sold
- Country of residence of staying visitors to include Overseas (Britain, North America, Mainland Europe and other areas), domestic and Northern Ireland.

The survey will need to be conducted throughout the year and would ideally be conducted on-line with a capacity to include telephone interviews as required to ensure appropriate coverage of all accommodation sectors.

The results of the survey would be weighted to population estimates for bed spaces or equivalent for all accommodations in Ballyhoura and will provide estimates of staying visitors in paid accommodation that can be monitored year on year for the period under review.

Indicative Targets and Economic Impact

In recognition of the need for guidance on the present values of tourism and future targets, TDI has made estimates based on the 2012 base year calculations outlined above through the application of national forecast growth rates for overseas and domestic tourism.

A forecast for Ballyhoura should start with the overall performance outlook for Irish tourism. A target for Ballyhoura would then reflect the marketing and development initiatives proposed in the development plan.

Projected growth rates for Irish tourism are as follows: -

Projected Growth Rates (%)	Overseas Tourism	Domestic Tourism
2014 - 2016	+5 - 6%	+1%
2017 - 2020	+3 - 4%	+2 – 3%

The calculation for Ballyhoura overnight visitors for the period to 2020 is made as follows:

Step 1 – take the 2012 numbers of visitors spending overnights in the Ballyhoura area, estimated by TDI as between 106,200 staying 3 nights or 212,400 at 2 nights,

Step 2 - use the overseas:domestic split as identified in the LIT work i.e. 53:47,

Step 3 – apply the national growth rates for overseas and domestic visitors, the latter to include VFR visitors and day trip (i.e. 2013 provisional growth rates, mid-point of growth rate ranges 2014 – 2016 and 2017 – 2020 from the official projections shown above)

The national growth rate for domestic tourism has been applied for forecasts of day trippers while for VFR visitor a rate slightly higher than for domestic tourism has been used to reflect the fact that VFR visits included both overseas and domestic visitors

This exercise produces indicative targets of visitor nights (for those staying in the region) and day trippers to Ballyhoura for 2016 and 2020 as indicated below before the divide symbol. The growth rates on which these estimates of future visitation have been calculated are the national average. It can be anticipated that Ballyhoura will outperform the national average given full and successful implementation of the development and marketing proposals outlined in this plan. A target of 10% above the level calculated on the national average is suggested as an achievable target. The revised targets are shown following the divide symbol.

Year	Overseas Overnight Visitor/ Guest Nights ('000)	Domestic Overnight Visitors ('000)	Combined Overseas and Domestic Overnight Visitors ('000)	VFR Visitors ('000)	Day trippers ('000)
2012	169	150	319	78	282
2016	210/231	156/172	366/373	83/91	293/312
2020	240/265	174/191	414/456	93/102	323/355

Using the same levels of spending as in calculating the base revenue figures for 2012, visitor revenue targets can be set for Ballyhoura.

Year	Overseas Overnight Visitor/Guest Nights (€ mn)	Domestic Overnight Visitors (€ mn)	Combined Overseas and Domestic Overnight Visitors (€ mn)	VFR Visitors (€ mn)	Day trippers (€ mn)	TOTAL (€ mn)
2012	15.2	7.5	22.7	11.0	11.1	44.8
2016	18.9/20.8	7.8/8.6	26.7/29.4	11.7/12.9	11.5/12.3	49.9/54.6
2020	21.6/23.9	8.7/9.6	30.3/33.5	13.1/14.4	12.7/14.0	56.1/61.9

Applying the Fáilte Ireland standard coefficient of 36 jobs created by each €1 million of visitors spending, suggests an employment base in excess of 1,500. By 2016, the region could support between 1,500 and 2,000 jobs, while by 2020 employment from tourism should be between 2,200 and 2,300 if the target revenues are achieved.

Appendix 11 – Product Audit

1.1. Product Audit Methodology

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

- **Desk Based Research:** including collation of data from Fáilte Ireland's Tourism Content System, databases supplied by Ballyhoura Fáilte, county tourism websites, county development plans and web searches
- In depth **site visits**
- Targeted **consultation**

A database was utilised to store and analyse 560 tourism and recreation product data entries under the headings of:

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

• Festivals & Events

This section describes and analyses the results of the product audit for the Ballyhoura study area in terms of how the tourism product range is dispersed, clustered and linked from a spatial, thematic and quality perspective.

1.2. Gateways and Access Points

There are three tiers of gateways to the Ballyhoura Country area.

- **Tier 1: Large urban areas** in close proximity to the study area which act as a base for many visitors and which include significant resident populations.
- **Tier 2: Medium size towns and attractions** which although outside the study area may be part of visitor's circuit or act as a magnet to bring visitors into the broader area thus benefitting the communities in the study area.
- **Tier 3: Primary Destination Gateways** – included because of their role within the study area as transport hubs, population size, strategic location and availability of accommodation and local ancillary services including visitor information centres.
- **Tier 4: Secondary Destination Gateways** - these include those villages and smaller settlements which could also be considered access points for the study area.

Gateways to the Ballyhoura Country Study Area

Tier 1: Large Urban Areas	Tier 2: Towns & Attractions outside study area	Tier 3: Primary Destination Gateways	Tier 4: Secondary Destination Gateways
Cork (190,196)	Cashel (Rock of Cashel)	Mitchelstown	Kilmallock
Limerick (91,303) ¹⁰	Blarney (Blarney Castle)	Charleville	Kilfinane
	Mallow		Doneraile
	Fermoy		
	Tipperary Town		
	Clonmel		
	Cahir		

¹⁰CSO Census 2011

In addition to gateways there are key access points to the area for visitors and locals, such as:

- **Rail and bus stations** (see section A2.3 below)
- **Intersections with existing trails** (see section A2.5.1 Hiking/Walking below)
- **Attractions in the study area:** e.g. accommodation, activities, restaurants, shops that attract people to the area.

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

1.3. Public Transport Connections

Rail Stations:

Rail lines from the four main urban gateways¹¹ include the:

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

The routes and stations of these rail lines can be seen on Map 2: Study Area Overview. Inter-city trains carry a maximum of three bikes per train on every service. There is a charge for taking your bike on the inter-city train. The cost of bringing your bike depends on the distance you are travelling: €2.50 for up to 56km, €4.00 for 57km-108km, €5.50 for 109km-137km, €8.00 for 138km+. Iarnród Éireann recommends customers reserve their bicycles spaces online in advance of travel along with their seat. There is a charge of €6 per bicycle one way or €12 return. However at the moment if three people wish to take their

bikes on the train they have to pre-book two bikes on line and one in the station, hoping that there is one bike space free by the time they get there – you cannot pre-book three on-line.

Commuter trains can carry several bikes however Iarnród Éireann unable to confirm a maximum number saying bikes had to be pre-booked and the system would advise if there was space. Between 10:00am and 3:30pm and after 7pm and at all times weekends bikes may be carried on Cork area commuter services for free. Note on days of major sporting/concert events carriage of bikes may be withdrawn. Outside these hours bikes are not permitted unless they are folded bikes. The carriage of bicycles on Commuter services is at the discretion of station staff. At certain times (e.g. major sporting fixtures /concerts), it may not be possible to permit carriage of bicycles on Commuter services.¹²

Bus:

Relevant Bus Éireann services¹³ include:

Expressway Services

- 7: Cork-Fermoy-Mitchelstown-Clogheen-Cahir-Clonmel-Carrick-on-Suir-Kilkenny-Dublin
- X8: Cork-Fermoy-Mitchelstown-Cahir-Cashel-Dublin
- 51: Cork-Mallow-Buttevant-Ballyhea-Charleville-Limerick-Ennis-Galway
- 55: Limerick-Limerick Junction-Tipperary-Bansha-Cahir-Clonmel-Kilsheelan-Carrick-on-Suir-Pilltown-Mooncoin-Waterford

Regional Bus Services

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

¹¹ www.irishrail.ie/travelandstation

¹² Conversation with Iarnród Éireann, 7th October 2013

¹³ <http://www.buseireann.ie/inner.php?id=246>



- 328: Limerick-Galbally
- 329: Limerick-Kilmallock-Kilfinane
- 347: Limerick-Tipperary

Bus Eireann Network in the Ballyhoura Country Region



1.4. Visitor Attraction Performance

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

Ballyhoura Country Study Area Fee-paying and Free Visitor Attractions 2007-2012¹⁴

	Attraction	County	2007	2008	2009	2010	2011	2012
1	Ballyhoura Mountainbike Trails (free)	Limerick	N/A	N/A	25,000	50,000	60,000	62,000
2	King John's Castle, Limerick	Limerick	50,000	47,007	40,935	37,953	38,221	38,752
3	Limerick City Museum	Limerick	14,146	14,043	17,500	14,784	13,498	9,460
4	Lough Gur Visitor Centre	Limerick	3,010	2,019	1,912	1,779	1,624	Not available

¹⁴ Source: Fáilte Ireland 2012

Observation regarding this data:

- There are only **4 attractions** within the Ballyhoura Country study area that made returns to Fáilte Ireland. However there are some popular attractions in the area which do not provide data to Fáilte Ireland such as Doneraile Park and Mitchelstown Caves.
- Doneraile Court has been the focus of a significant development programme by Ballyhoura Development and attracts in excess of 100,000 visitors each year with the capability to attract far more.
- **Mountain biking** in the Ballyhoura Mountains is now a significant attraction in itself, attracting 62,000 visitors in 2012.
- **King John's Castle** has seen visitor numbers significantly decline since 2007 however they have remained relatively stable since 2009.
- Many attractions throughout Ireland, including the bottom three on this table, have seen **visitor numbers decline** in the last 6 years. However Ballyhoura Mountain Biking Trails have experienced a rise in visitor numbers increase.

1.5. Adventure Tourism

Adventure tourism covers a multitude of activities which range from those which require a level of skill and/or to which is attached a degree of risk, such as mountain-biking, bungee-jumping or canyoning which are termed hard-adventure; and those which are perceived as requiring a lower level of skill and associated risk such as hiking and bird-watching which can be termed soft-adventure. Soft adventure tourism activities are likely to appeal to a wider range of people due to the perceived reduced level of skill or experience. All forms of adventure tourism are experiencing a growth in popularity as people search for a means to experience nature and wildlife in a rural setting. The Adventure

Travel Trade Association (ATTA) defines a trip as 'adventure travel' if it involves two of the following three elements:

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

1.5.1. Hiking/Walking

Long Distance Trails

The southern part of the Ballyhoura Country study area is traversed by The Ballyhoura Way, an 89km route from St John's Bridge, County Cork to the west of Charleville, through County Limerick to Limerick Junction, County Tipperary just to the north of Tipperary Town, the location of which is shown on Map 4: Existing Cycle and Walking Routes

Loop, Linear and Sli na Slainte Walks

There are wide ranges of shorter walking routes throughout the study area to suit all tastes. These include Fáilte Ireland loop walks, linear trails, Sli na Slainte trails with 23 loop walks and 2 linear walks identified through the audit. Some of these are within forest parks on the mountains such as those in the Glenanaar Forest on Ballyhoura Mountain; others include river walks such as Keale River Walk between Ballyronan and Glenroe.

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

- Fáilte Ireland (loop walks)
- Visit Ballyhoura
- Irish Trails website
- Glen of Aherlow Fáilte

These walks range from less than an hour to longer walks up to 3-5 hours. These include:

- Ardpatrick: Ballinboola Woods Loop Walk¹⁵, Knockduv Loop Walk¹⁶
- Farrahy: Bowenscourt Graigue
- Ballyorgan: Ballyorgan Loop Walk, Lyre na Freaghaun Loop Walk, Keale River Walk (7km river walk between the two villages of Glenroe and Ballyorgan), Darragh Hills¹⁷
- Doneraile Loops
- Shanballymore River Loop Walks
- Ballyhoura Mountain: Canon Shehan Loop Walk¹⁸ (Glenanaar Forest), Justices Glen – Mass Rock Loop Walk, Blackrock Loop Walk¹⁹ (Seefin Summit Climb 528m)
- Glenbrohane: Sliabh Riadh Climb
- Kilfinane: Magniers Mountain Loop, Molanna Loop Walk²⁰, Castle Gale Loop Walk²¹
- Kildorrery: River Walk Kildorrery
- Ballylanders: Bog Walk Ballylanders
- Anglesborough: Benard²² Loop Walk, Paradise Hill Loop²³
- Galbally: Darbey's Bed Loop Walk²⁴, River Walk Galbally, Galbally Moor Abbey
- Kilbehenny: Attychraan Loop²⁵ (Galtee castle Wood), Galty Walk (Galtymore Mountain summit 919m)

¹⁵ <http://www.discoverireland.ie/activities-adventure/ballinaboola-loop/80867>

¹⁶ <http://www.discoverireland.ie/activities-adventure/knockduv-loop/80866>

¹⁷ <http://www.discoverireland.ie/activities-adventure/darragh-hills-loop/80873>

¹⁸ <http://www.discoverireland.ie/Activities-Adventure/canon-sheehan-loop/71437>

¹⁹ <http://www.discoverireland.ie/activities-adventure/blackrock-loop/62311>

²⁰ <http://www.discoverireland.ie/activities-adventure/molanna-looped-walk/88729>

²¹ <http://www.discoverireland.ie/activities-adventure/castlegale-loop/80872>

²² <http://www.discoverireland.ie/activities-adventure/benard-loop/80869>

²³ <http://www.discoverireland.ie/activities-adventure/paradise-hill-loop/80868>

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

Historic Town Walks

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

- Mitchelstown

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

- Kilmallock Town Trail

Walking Clubs

- Ballyhoura Bears Walking Club (The Ballyhoura Bears Walking Club organises walks each Sunday and visitors are welcome to join in. The club walk throughout the year and also on Thursday nights during summer.)
- Galtee Walking Club
- Croom Abu Walking Club
- Anglesboro Walking Club

Walking Festivals

The main walking festival within the study area is the Ballyhoura International Walking Festival held each May. This includes events on routes on the Ballyhoura Mountains, Galty Mountains and in the Glen of Aherlow as well as special interest walks such as heritage and archaeology. Experienced local guides lead a variety of walks during the festival and offer plenty of background information about the area. In addition the Ballyhoura Autumn Rambling Festival is held each year.

Activity Operators

Ballyhoura Fáilte offer guided walking tours in a variety of locations including the Galtymore Mountain Climb. There are guided walking tours around Lough Gur.

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

1.5.2. Cycling

Mountain-biking – Ballyhoura Mountain Bike Trails

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

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

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

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

tracks and single-track trails. Length: 35 kilometres, Time: 1.5-3hrs, Grade: Difficult, Metres Climb: 200m, Trail colour: White.

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

Cycle Routes from Towns

Kilmallock Cycle Hub²⁶: The historic town of Kilmallock is a cycle hub and has several trails which lead out into the surrounding countryside. These trails have views of the Ballyhoura and Galtee Mountains and heritage sites in the surrounding landscape.

- **Loop 1: 70kms - 5 hours and Loop 1A:** 22kms - 1½ hours: Route 1 is a circuit around the periphery of the Ballyhoura Mountains. The road follows the contours of the mountain foothills to the town of Doneraile, where there are ample opportunities for refreshment. There is one major climb on the eastern leg of the circuit; the mountain pass between Glenosheen and Glenanaar. Ascending to 307 metres you will encounter breathtaking scenery here to reward your efforts. The entrance to the specially developed Ballyhoura

²⁶ <http://www.discoverireland.ie/Activities-Adventure/kilmallock-cycle-hub/87476>



Mountain Bike centre is located along this section.

- Loop 2:** 83 kms - 5½ hours, Loop 2A: 16 kms - 1 hour, Loop 2B: 41 kms - 3 hours, Loop 2C: 64 kms - 4+ hours: Route 2 is a trip east to the Glen of Aherlow. There are fine views of Seefin, the highest peak of the Ballyhouras and of Galtymore Mountain. Having negotiated the first hill at Slieveveagh you arrive into the beginnings of the Glen of Aherlow where you can decide which of the shortcut options are appropriate. Continuing on into the heartland of the glen, past the villages of Galbally and Lisvarane you will finally encounter the iconic and very steep climb of Aherlow. Although not a particularly long climb, the tortuous hairpins and the magnificent views from the Christ the King statue make this “one to remember” for those who complete the entire circuit.
- Loop 4:** 70 kms: Loop 4 is a shorter spin around some pleasant wooded hills near the townlands of Glenroe and Castle Oliver. You will pass the ornate gatehouses of the privately owned castle as you cruise along these secluded roads. Refreshments may be had at Ardpatrick or Kilfinane.



Bike Hire & Repair

Bikes can be hired from:

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

Bike repair shops include:

- Kilmallock Cycles

Cycling Clubs include:

- Kilbehenny Cycling Club
- Kilmallock Cycling Club
- Fermoy Cycling Club
- Galtee Wheelers (Mitchelstown)
- Kilworth Cycling Club
- Mallow Cycling Club
- Southside Wheely Wheelers
- Team Ballyhoura Club

1.5.3. Angling

The study area contains several fisheries which are renowned for angling. These include large rivers such as the Suir and Blackwater and smaller rivers such as the Camoge River at Croom. The Camoge River flows west to join the Maigue upstream of Croom, County Limerick. Fishing on the river is strictly confined to fly fishing only. Ballyhass Lakes near Mallow offer superb salmon & trout fishing along with guides, boat hire, accommodation, fly fishing lessons as well as the adventure centre activities.

Local **activity operators** include:

- Ballyhass Lakes, Cecilstown, Mallow, Co. Cork (www.ballyhasslakes.ie)
- Ghillie Cottage and Blackwater Fly Fishing (Fermoy)
- Celtic Angling at Balinagarry
- Millbank Angling Centre, Murroe
- Fly Fish Ireland

Tackle Shops within or in close proximity to the Ballyhoura Country study area include:

- Bonds Tackle, 40 Wickham St, Limerick, Tel: (061) 316809
- Limerick Angling Centre, 3 John St, Limerick, Tel: (061) 316637
- Steve's Tackle Shop, 6 Denmark Street, Limerick, Tel: (061) 413484
- The Shoe Shop, New Street, Abbeyfeale, Co. Limerick, Tel: (068) 31411
- Pet Barn, Bishops Street, Newcastle West, Co. Limerick, Tel: (069) 61877
- The County Dresser, Station Road, Adare, Co. Limerick, Tel: (061) 396915
- The Kingfisher Angling Center, Castleconnell, Co. Limerick, Tel: (061) 377407
- Country Lifestyle , Unit C, Spa Square, Mallow, Co. Cork, Tel: (022) 20121
- Halfway Angling Centre, Halfway, Ballinhassig, Co. Cork, Tel: (021) 4885894
- T.W. Murray & Co Ltd, 87 Patrick St, Cork, Tel: (021) 4271089
- Rivers Edge Tackle, Inniscarra Road, Carrigrohane, Co. Cork, Tel: (021) 4871771
- The Tackle Shop, Lavitts Quay, Cork, Tel: (021) 4272842 Fax: (021) 4270301
- Brian Toomey Sports & Leisure, 18 McCurtain Street, Fermoy, Co. Cork, Tel: (025) 31101
- Premier Marine, Main Street, Littleton, Thurles, Co. Tipperary, Tel: (0504) 44336
- Kavanagh's Sports Shop, Upper O'Connell Street, Clonmel, Co. Tipperary, Tel: (052) 21279
- FishHunt, Philip Maher, Fishhunt, Touraneena, Ballinamult, Clonmel, Co. Tipperary, Tel: 058 47524
- TJs Angling Centre, Main St, Ballina, Killaloe, Co. Tipperary, Tel: 061 61 376009

Angling Guides include:

Doug Lock, Blackwater Flyfishing, Guide and Instructor for salmon and trout fishing

- Address Ghillie Cottage, Kilbarry Stud, Fermoy, Co. Cork
- Phone +353 25 32720 or +353 87 286 9139
- E-mail flyfish@eircom.net
- Website www.speycast-ireland.com

Paddy Dunworth, Celtic Angling, Guide and Instructor for fly fishing, pike and sea fishing

- Address The Commons, Ballingarry, Co. Limerick, Ireland
- Phone +353 69 68202
- E-mail info@celticangling.com
- Website www.celticangling.com

Richard and Eleanor Keays, Millbank House, Guides and Instructors for salmon, trout pike and sea fishing

- Address: Millbank House, Murroe, Co Limerick
- Telephone: +353 61 386 115
- E-mail: info@millbankhouse.com
- Website: www.millbankhouse.com

1.5.4. Kayaking/Canoeing

See section A2.5.15. regarding multi-activity providers

1.5.5. Sailing and Watersports

See section A2.5.15. regarding multi-activity providers

1.5.6. Orienteering/Hill-running

Ballyhoura Orienteering, Kilfinane
Beast of Ballyhoura Adventure Race, Kilfinane

1.5.7. Equestrian

- Hillcrest Riding Centre, Galbally
- Ballyhoura Horse Trails, Kilfinane (This operator has a 5-hour trek with outstanding views of the Galtee and Ballyhoura Mountains)
- Tory Hill Equine Assisted Learning Centre, Croom
- Ash Hill Stud, Killamallock
- Churchtown Riding School
- Collins Equestrian, Kilmallock

1.5.8. Golf

Golf Courses

- Charleville Golf Club
- Doneraile Golf Club
- Mitchelstown Golf Club
- Ballykisteen Golf & Country Club, Limerick Junction
- Castletroy Golf Club

Pitch & Putt

- Charleville Pitch & Putt Club
- Bruff Pitch & Putt Course
- Croom Pitch & Putt Course
- Mitchelstown Pitch & Putt Course
- The Lough Inn Pitch & Putt Course, Holy Cross, Grange

1.5.9. Para-gliding

Paragliding takes place in Tipperary with Midland Paragliding, located in Tipperary Town. They offer para-gliding in many locations including the Galtee Mountains.

1.5.10. Country Pursuits

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

Ancient Irish Bush Craft are located at Doon



1.5.11. Quad-biking

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

1.5.12. Paintballing

Combat Zone Paintballing have an office in Limerick City and operate at Shanagolden Woods near Cloonty in County Limerick.

1.5.13. Helicopter Tours and Lessons

Gaelic Helicopters located at Dromohane near Mallow offer local helicopter tours.

1.5.14. Multi-activity Providers

- **Kilfinane Outdoor Education Centre** offer canoeing, kayaking, raftbuilding, riverwalking, mountain-biking, rockclimbing, abseiling, indoor climbing, orienteering, team challenges, campcraft) for youths schools and adults
- **Galtee Valley Extreme Adventures**, Mitchelstown offer archery, dune buggys, zorbing, giant foosball, sumo wrestling, giant jenga, sniper shot, radio controlled cars, obstacle course, airsoft
- **Blackwater Outdoor Activities**, located on the Blackwater Castle Estate near Castletownroche, offer river kayaking, river tubing, archery, zorbing, dune buggy driving, wilderness camping, wilderness survival skills.
- **Ballyhass Lakes, located near Mallow**, offer flyfishing, rock-climbing, abseiling, kayaking, ropes courses, zip-line, archery, hiking, aero-ball as well as accommodation and boat hire.

1.6. Built Heritage

The Ballyhoura Country study area has a diverse range and number of built heritage attractions these range from pre-historic, medieval including religious buildings, and later structures of significance.

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

1.6.1. Pre-Historic Structures

The Ballyhoura study area has a rich and interesting history stretching back several thousand years. This is evident in the wide range of pre-historic structures such as:

- megaliths such as the Labbacallee Wedge Tomb near Glanworth, the largest of all Irish wedge tombs known as the Hag's Bed and estimated to date to 2300BC, the tomb is associated with the Celtic Hag Goddess 'Caillech Bhearra'. The gallery is covered by three massive capstones, the largest weighs around ten tonnes and the tomb has three large buttress stones at the rear. Excavation in 1934 produced a number of exhumation burials, fragments of a late Stone Age decorated pot and a few fragments of bone and stone.²⁷
- ringforts such as those at Ballinavreena, Bruree, Gleroe and Shanballymore with the greatest concentration being located at Bruff near Lough Gur
- the Great Stone Circle at Bruff estimated to date to 2000BC

²⁷ Source: www.heritageireland.ie

- Cush Earthworks, two miles to the north of Kilfinane, which contain an extensive complex of ancient fields and enclosures and excavations have indicated that the site was continuously occupied by an agricultural community from around 1000 BC to 400 AD
- Holy wells such as those at Ballylanders, Doneraile and Effin

Others include burial grounds, churches, mottes, tower houses, mass rocks, standing stones and the Ogham stone at Glenbrohane.

1.6.2. Medieval Structures

These the many medieval structures in Kilmallock such as the Town Gates, Johns Castle, Kilmallock Friary (1291), one of the best such examples in Ireland, the Collegiate Church (13th Century) and the Church of St Peter and Paul as well as significant mediaeval town centre buildings and the remains of the town wall. Kilmallock's nearest neighbour during the period, Buttevant, also boasts several buildings such as Ballybeg Augustinian Priory, Buttevant Franciscan Priory as well as parts of the town walls.

The study area contains a wide range of medieval religious built heritage including abbeys (Galbally), priories, friaries, significant churches: (Kiflyn Church in Buttevant, Kilbehenny Medieval Church) and a wide range of tower houses and medieval era castles.

- **Kilmallock Collegiate Church** was founded in the 13th century and was dedicated to Saints Peter and Paul. The church has three aisles, a chancel and a north transept, and includes a fine 13th-century door in the south wall. 28
- **Kilmallock Dominican Priory:** The foundation of this Dominican Priory is ascribed to Gilbert, second son of John of Callan, Lord of Offaly, in 1291. besides the five-light west window - which is

one of the most exquisite in the country - the church contains some fine decorative stone-carving of 13th and 14th-century date. 29

- **King's Castle and Blossom Gate** is named after King John, but the present castle is probably 15th-century in date. It is a four-storey building with mullioned and pointed windows. Not far away, in Emmet Street, is Blossom Gate, the sole surviving gate of the medieval town wall.³⁰
- **Buttevant Franciscan Friary:** The 13th-century ecclesiastical site was founded by David Oge Barry and dedicated to Thomas Becket. Among the remains of the settlement, visitors will find a nave-and-choir church, several lancet windows, tomb niches, a double crypt and single piscina. After the abbey was dissolved, it was taken over by the Barrys. Still, the friars returned in 1609 and remained intermittently until 1783.³¹
- **Dysert Oenghusa Church And Round Tower:** Visitors can find the Dysert Oenghusa Church near Croom in County Limerick. The present church dates back to the 15th or 16th century, but previously the site housed a monastery that was the first mentioned in history, in 1083.³²
- **Glanworth Castle and Dominican Friary:** Though small, the village of Glanworth is home to impressive ruins. Found just 10km northwest of Fermoy, County Cork, the village boasts a 13th-century castle that belonged to the Roche family, which at the time controlled much of the territory of North Cork. Among the remains, visitors will find a large rectangular building and tower. Nearby, there is also the hall-like church of a Dominican friary established by the Roches in 1475.³³

²⁸ Source: www.heritageireland.ie

²⁹ Source: www.heritageireland.ie

³⁰ Source: www.heritageireland.ie

³¹ Source: www.heritageireland.ie

³² Source: www.heritageireland.ie

³³ Source: www.heritageireland.ie

1.6.3. Later Structures

These include Doneraile House, Liscarroll Castle, Mallow Castle, and King John's Castle in Limerick City.

- **Doneraile House and Park:** The Park comprises approximately 166 hectares and is an outstanding example of an 18th century landscaped park in the 'Capability Brown' style. Mature groves of deciduous trees, several restored water features and a number of deer herds can be viewed along the many pathways within the Park. The pathways are generally accessible for people with special needs. Doneraile Court, the former residence of the St. Leger family, is situated within the Park. It will be opened to the public in the future, following completion of necessary restoration and safety works.³⁴
- **King John's Castle:** King John's Castle is situated on 'King's Island' in the heart of medieval Limerick City. The Castle overlooks the majestic river Shannon. It was built between 1200 and 1210 and was repaired and extended many times in the following centuries. The interpretative centre at the Castle contains an imaginative historical exhibition which tells the story of the Castle. Archaeological excavations have revealed pre-Norman settlements and evidence from the traumatic siege of 1642. The courtyard and the Castle display some of the trades and traditions of the 16th Century. The Castle offers panoramic views of Limerick City and the surrounding countryside. The sights, scenes and sounds of the Castle and its environs all combine to recreate the atmosphere of the era.³⁵
- **Dromaneen Castle (Mallow):** This fortified house and castle, finely situated overlooking the River Blackwater, was erected by the O'Callaghans around 1600. It was an L shaped tower with a fine fireplace on the first floor and three and four mullioned windows. The Castle suffered much in the Rebellion of 1641, when it was taken from the O'Callaghans, granted to Sir Richard Kyrle, and later sold to Richard Newman of Cork.³⁶
- **Mallow Castle** is situated on acres of land overlooking the River Blackwater. It is a sixteenth century fortified house and is one of three buildings on this site. It may have been built by Sir Thomas Norrey who was the Lord President of Munster, before his death in 1599, when it was then passed to his niece Elizabeth. Wings project from the centre of the north and south walls, the northern one containing the entrance with a finely moulded doorway. The prominent windows are square-headed and there are musket loops in the walls.³⁷
- **Kilbolane Castle (Charleville):** Destroyed by Cromwells army in 1642, leaving only two towers intact. Each tower was then used by separate parties until 1897. They have been maintained over the years by the OPW and can be viewed by the public throughout the year.³⁸
- **Liscarroll Castle:** The entrance was through the south wall, where there is a large oblong tower with a long passage which was closed by a heavy door and which possibly had a portcullis. This tower was heavily modified in the 15th or 16th century around 1625 when it was taken by Lord Castlehaven for the Irish. In Cromwellian times it was returned to the Percevals.³⁹

³⁴ Source: www.heritageireland.ie

³⁵ Source: www.heritageisland.ie

³⁶ Source: www.discoverireland.ie

³⁷ Source: www.discoverireland.ie

³⁸ Source: www.discoverireland.ie

³⁹ Source: www.discoverireland.ie

1.7. Cultural Heritage

1.7.1. Heritage Centres

Heritage Centres include Mallow Heritage Centre and the De Valera Museum and Heritage Centre.

The De Valera Museum and Bruree Heritage Centre is dedicated to Eamon de Valera [1882-1975], former president of Ireland and one of the country's most famous statesmen, it houses a unique collection of personal belongings of this historic figure, as well as a wide range of articles which record life in Bruree in the early 20th century. This visitor centre is located where Eamonn de Valera grew up. The cottage in which he lived is now preserved and the national school he attended houses a museum dedicated to his memory. The Heritage Centre uses audio visuals, graphic panels, set pieces and displays of personal memorabilia to tell the story of the village's greatest son and of the area which is credited with forming his character.⁴⁰

1.7.2. Museums & Visitor Centres

The majority of the museums within the study area are those in Limerick City e.g. Limerick Museum, The Hunt Museum, Thorman Park Stadium and Museum, and The Frank McCourt Museum. Others include the Lough Gur Visitor Centre, the Villages of Tradition Exhibition Centre at Galbally and Kilmallock Museum (temporarily closed at the moment).

Lough Gur Visitor Centre houses a number of exhibitions detailing the fascinating archaeological finds in this area. An audio visual show and display panels on the geology, botany, zoology and archaeology of the area are combined with local folklore and Celtic Festivals while the centre also houses replicas of famous finds in the area. These include Stone Age pottery, the famous Bronze Age Lough Gur Shield (now housed in the National Museum) and the Countess of Bath chalice and paten. Such a rich archaeological area provides evidence about the activities of the

first farmers in the region, their dwellings, rituals, and burial sites as well as their tools and implements.⁴¹

1.7.3. Theatres and Cinemas

Theatres include the Friar's Gate Theatre and Arts Centre in Kilmallock, the Lime Tree Theatre, Loft Theatre and the University Arena in Limerick City, and St John's Church at Knockainey, which offers monthly performances.

1.7.4. Art Galleries

Art galleries and exhibition spaces include:

- Blackwater Castle, Castletownroche
- The Village Arts Centre, Kilworth
- Limerick City Gallery of Art
- Friar's Gate Theatre and Art Gallery, Kilmallock (monthly exhibitions, workshops in arts and crafts as well as Irish music and drama for children and teenagers)

1.7.5. Artisan Craft Producers

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

- Charleville: Glen Bridge Forge and Glenbridge Craft (Candles, cards, jewellery, quilts)
- Adare: Adare Gallery Craft Shop (designer knits, paintings, silver jewellery, pottery, ceramics)
- Limerick City: Artisans Craft Fair (last Thur of every month)
- Kilworth: Gallery Crafts (jewellery, ceramics, textiles and artwork by Fiona Turley)

⁴⁰ Source: www.heritageireland.ie

⁴¹ Source: www.heritageireland.ie

1.7.6. Traditional Music & Dancing

Traditional music venues are located at:

- Ardpatrick: Irish Set and Ceili Dancing Classes, Greenwood Inn
- Ballinvreena (near Kilfinane): Cushvreena Lodge Rambling House, Ballinvreena Crossroad Dancing, Ballinvreena Irish Dancing lessons at Ballinvreena Community Hall
- Kilmallock: Deebert House Hotel Irish Nights
- Bruff: Lough Gur Rambling House
- Colmanswell: Colmanswell Rambling House
- Labbamalogga: T'O Park
- Cloverfield: An Teach Music and Dancing Nights

1.7.7. Literature

- Trevor Bowen Summer School, Mitchelstown

1.7.8. Traditional Sports

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

1.7.9. Festivals and Events

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

Music, Drama, Dance & Literary

- Charleville: North Cork Drama Festival
- Glenroe Harvest Festival
- Kilfinane: Rocky Mayhem
- Kilmallock: Festival of Once Act Drama
- Mitchelstown: Independence Music & Arts Festival

- Bruff: The Tommy Brouder Festival
- Bruff Bluegrass Music Festival
- Bloomsday in Bruff
- Bruff: Lough Gur Storytelling Festival

Traditional Culture

- Galbally Garden Fete
- Kilbehenny Potato Festival
- Mitchelstown: St Patrick's Day Parade
- Bruff: Lough Gur Summer Solstice Festival
- Bruff Summer Festival
- Croom: Manister Spring Fair

Adventure Activity

- Ballyhoura: Headless Horseman Adventure Race (endurance event), Ballyhoura International Walking Festival, Ballyhoura Autumn Rambling Festival, Limerick Biking Blitz Mountain Bike Event (16-17/02/13), Ballyhoura Mountain Bike Trail Day at the Greenwood Loop (18/03/13), Ballyhoura Country Walk of the Blackrock Loop (21/03/13), Walking Tour of the Griston Bog Outdoor Classroom (23/03/13), Gravity Enduro Mountain Bike Event
- Slivenamuck Walking Marathon and Half Marathon
- Munster XC Mountain Biking Series
- Kilmallock Cycling Hub Annual Hub Tour
- Mountain Bike Cork (MBCC) Series
- Glen of Aherlow Walking Festival
- Anglesboro Mid Summer Walking Festival
- Galtee Crossing/Challenge
- Winter off Road Duathlon Series
- National Trails Day
- Winter off Road Duathlon Series
- Spook MBT Day & Night Race
- National Marathon Mtb Championships

- The Paddy Dakar, Doon

Food, Craft and Art

- Mitchelstown: Mitchelstown Food Festival & Awards

Historic

- Charleville: Archbishop Mannix Memorial Weekend
- Charleville: Charleville Agricultural Show
- Kilmallock Walled Towns Day

Children's Festival

- Children's festivals include Croom Christmas Festival.

1.7.10 . Driving Tours

The study area offers a wide range of driving trails. These are shown in the table below.

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

Driving Routes Within and Near the Study Area

Driving Route	Length (km)	Route
Limerick Drive	134	Limerick City-Adare-Newcastle West-Dromcollogher-Rath Luirc-Kilmallock-Hospital-Limerick City
Ballyhoura Heritage Trail - Sli Finn	30	Gentle, winding roads cut through this scenic terrain that's dotted with wonderful archaeological, mythological and historical sites. Amongst the rolling countryside you'll be tempted to stop-off at the pretty villages. The signposted drive takes you through Kilfinane, Ardpatrik, Glenosheen, Ballyorgan and Ballylanders. Must see stops along the route Ardpatrik, Castle Oliver, Glenosheen.
Ballyhoura Heritage Trail - Golden Vale Drive	112	Limerick-Pallas Green-Emly-Galbally-Ballylanders-Kilfinane-Kilmallock-Bruree-Athlaccá-Bruff-Holycross-Lough Gur This sweeping drive will introduce you to the natural features that gave The Golden Vale its evocative name. The sign-posted driving route weaves through the villages and towns of Kilmallock, Bruree, Bruff, Croom, Lough Gur, Ballyneety, Pallas Green, Emly, Galbally, Kilfinane and Ballylanders. Must see stops along the route include: Lough Gur, Kilmallock, Galbally, Bruree
Ballyhoura Heritage Trail - Ballyhoura Drive	123	Not only are you guaranteed beautiful scenery on this rural drive, but you'll pass through a collection of handsome towns that showcase the rich history and culture of Ballyhoura Country. The signposted driving route takes you through Labbamologga, Ballinvreena, Mitchelstown, Kilbehenny, Anglesboro, Kildorrery, Shanballymore, Castletownroche, Doneraile, Churchtown, Liscarroll, Dromina, Milford, Charleville, Kilmallock and Kilfinane. Must see stops along the route Liscarroll Castle, Labbamologga, Kilbolane Castle, Aghacross stonework, Doneraile Court.



1.8. Natural Heritage

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

1.8.1. Designated Sites

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

- **National Heritage Areas (NHA's):** The basic designation for wildlife is the Natural Heritage Area (NHA). This is an area considered important for the habitats present, or which holds species of plants and animals whose habitat

needs protection – 75 raised bogs and 73 blanket bogs have been given this legal protection in Ireland.

There is 1 NHA within the study area:

- Grageen Fen & Bog NHA (002186)
- **Proposed National Heritage Areas (pNHA):** These were published on a non-statutory basis in 1995, but have not since been statutorily proposed or designated. These sites are of significance for wildlife and habitats. Some of the pNHAs are tiny, such as a roosting place for rare bats. Others are large such as a woodland or a lake, for example. There are 630 pNHA's in Ireland.

There are 34 pNHA's within the study area:

- Ballyhoura Mountains (002036)
- Carrigeenamronety Hill (002037)
- Ballintlea Wood (002086)
- Ballinvonear Pond (000012)
- Kilcolman Bog (000092)
- Eagle Lough (001049)
- Ballindangan Marsh (000899)
- Awbeg Valley (Above Doneraile) (000075)
- Awbeg Valley (Below Doneraile) (000074)
- Browns Farm, Togher Cross (001169)
- Glanworth Ponds (000085)
- Clare Glen (000930)
- Glenstal Wood (001432)
- Bilboa and Gortnageragh River (001851)
- Ballyvorheen Bog (001849)
- Dromsallagh Bog (001850)
- Knockanavar Wood (000961)
- Skoolhill (001996)
- Tory Hill (000439)
- Lough Gur (000437)

- Herbertstown Fen (000436)
- Glen Bog (001430)
- Galtee Mountains (000646)
- Ballyroe Hill and Mortlestown Hill (002089)
- Castleoliver Woods (002090)
- Mountrussell Woods (002088)
- Ballynacourty Wood (002087)
- Glencurrane River Valley (002035)
- Derrygareen Heath (000931)
- Aughnaglanny Valley (000948)
- Inchinsquillb and Dowlings Valley (000956)
- Kilbeg Marsh (001848)
- Philipston Marsh (001847)
- Ballyneill Marsh (001846)

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

There are 12 SAC's within the study area:

- Lower River Shannon (002165)
- Lower River Suir (02137)
- Clare Glen (000930)
- Angelsey Road (002125)
- Philipston Marsh (001847)
- Galtee Mountains (000646)
- Glenstal Wood (001432)

- Askeaton Fen Complex (002279)
- Tory Hill (000439)
- Glen Bog (001430)
- Ballyhoura Mountains (002036)
- Carrigeenamronety Hill (002037)
- **Special Protected Areas (SPA)** Ireland is required under the terms of the EU Birds Directive (2009/147/EC) to designate Special Protection Areas (SPAs) for the protection of endangered species of wild birds. Ireland's SPA Network encompasses over 570,000 hectares of marine and terrestrial habitats

There are 2 SPA's within the study area:

- Slievefelim to Silvermine (004165)
- Kilcolman Bog (004095)

1.8.2. Forest Parks

There are five Forest Recreation Sites listed on the www.coillteoutdoors.ie website within the study area. These include those on Ballyhoura Mountain such as Ballyhoura Forest near Ardpark, Glenanaar Forest Recreation Area on the south side of the mountain, Ballinaboola on the north side of the mountain, Galty Castle Recreation Area on the south side of the Galtee Mountains near Kilbehenny and Glenstal Wood to the north-east of Murroe, 15km east of Limerick City.

1.8.3. Natural Attractions

Aside from the four mountain ranges there are many natural attractions within or close to the study area. These include Tory Hill near Croom and Lough Gur near Bruff. Just outside the study area, Mitchelstown Caves lie 12km are located 12km to the east of Mitchelstown.

- *Tory Hill: At 372 ft. high, Tory Hill dominates the landscape of Munster close to the town of Croom. This*

*isolated, limestone hill is of particular geological interest due to the end-moraine left by glaciers at the end of the last Ice-Age as well as the ice marks visible on exposed areas of rock. These glacial deposits are amongst the largest in Europe.*⁴²

1.8.3. Views

There are several notable locations for views including Ballyhoura Woods car park.

1.8.4. Gardens

Interesting gardens within the study area include Islanmore Stud and Gardens near Croom, Terra Nova Gardens near Kilmallock and Annes Grove Gardens near Castletownroche.

- *Islanmore Gardens: Found near Limerick City in Croom, Islanmore Gardens are an oasis. They are set around a lovely Georgian house with 1 hectare of mown lawn, an extensive shrubbery and a whole range of mature specimen trees, including Fraxinus Ornus, Aesculus Indica and Quercus Robur Variegata. The gardens are open throughout the year by appointment only.*⁴³
- *Terra Nova is a beautifully designed and richly planted garden located near Kilmallock, County Limerick. It has been featured on RTE Radio 'Planting Passions', and twice in both The Irish Garden magazine and the Sunday Times. Terra Nova was also awarded 'Best Garden in the 32 Counties' in the All-Ireland Viking Irish Garden Competition 2005. A gardener's paradise, Terra Nova is full of imaginative features and unusual plants*

⁴² Source: www.askaboutireland.ie

⁴³ Source: www.heritageireland.ie

around every corner. The garden is also home to Terra Nova Plants, a small nursery that specialises in rare and out of the ordinary plants. The garden's website has a complete list of the plants/seeds. Terra Nova is open by appointment.⁴⁴

1.8.5. Visitor Farms

Visitor farms include The Donkey Sanctuary at Liscarroll, Parson's Green Pet Farm and Caravan Park at Clogheen, Molanna View Farm near Kilfinane and Buttercup Farm near Croom.

- *The Donkey Sanctuary is an Irish registered charity working to improve conditions for donkeys and mules. The Sanctuary is set in the beautiful rolling countryside of County Cork just outside the village of Liscarroll. The Donkey Sanctuary have taken in over 2,850 donkeys rescued from all parts of the country. Every donkey taken into the Sanctuary is guaranteed a life of loving care. The Donkey Sanctuary has a dedicated team of regional and area welfare officers throughout the UK and Ireland who investigate reports of cruelty to or neglect of donkeys, quickly and efficiently.*⁴⁵
- *Buttercup Farm, on the main Limerick to Cork Road, boasts a large selection of farm animals including cattle, sheep, pigs, fowl and exotic birds. Facilities include a playground, picnic area and, horse and cart riding. Seasonal events are held throughout the year.*⁴⁶

1.9. Visitor Facilities

1.9.1. Accommodation

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

- **4 hotels:** In addition to the 22 hotels located in **close proximity to the study area** in Limerick City there are also hotels located at Castletroy (Castletroy Park Hotel, Kilmurry Lodge Hotel, Brookfield Hall), Mallow (Springford Hall, Longueville House and the Hibernian), Adare (Fitzgeralds Woodlands House Hotel), Ballingarry (Mustard Seed at Echo Lodge Hotel), Castleconnell (Castle Oaks House Hotel), Glen of Aherlow (Ballinacourty House, Aherlow House). **Within the study area hotels are located at Mitchelstown (Clongibbon House Hotel and Firgrove Hotel), Kilmallock (Deebert House Hotel) and Charleville (Chareville Park Hotel).**
- **55 self-catering:** the main locations are Kilmallock (9), Castletownroche (10), Kilfinane (5), Mallow (4) and Ardpatrick (3).
- **2 holiday homes:** there is one each at Kilfinane and Glenasheen
- **5 farmhouses with accommodation:** located at Mitchelstown, Kilmallock, Bruff, Croom and Kilfinane
- **5 camping and caravan parks:** located at Clogheen, Glen of Aherlow, Ballinacourty, Ballylanders and Kilbehenny
- **4 youth hostels:** at Ballingarry, Galbally, Kilfinane and Cahir
- **4 hostels:** in Limerick City

⁴⁴ Source: www.heritageireland.ie

⁴⁵ Source: www.discoverireland.ie

⁴⁶ Source: www.discoverireland.ie

Taking **all accommodation** into account the principal accommodation clusters are:

- Limerick City (44), Mallow (18), Kilmallock (15), Mitchelstown (11), Kilfinane (10), Castletownroche (9) and Castletroy (8)

Currently there is no marketing advantage to be gained by promoting the area as a centre of sustainable tourism as only one business, Charleville Park Hotel, is listed on either the www.ghawards.ie or the Fáilte Ireland Green Pages as having environmental accreditation. This could be an area for future development.

1.9.2. Pubs, Bars, Cafes & Restaurants

Most towns contain at least two or more pubs. Some towns have pubs of particular heritage value such as Kilfinane and Castletownroche.

There are many restaurants & cafes within the study area with some places such as Kilmallock (7), Charleville (8), Mallow (4) and Mitchelstown (8) hosting the majority.

1.9.3. Artisan Food & Drink

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

- Kilmallock: Ballyhoura Apple Farm at Darnstown and Effin Creamery Handcrafted Irish Cheddar
- Mitchelstown: Clotilde's Compote at Ballindangan, Hodgins Craft Butchers, Horgans Speciality Meats and Eight Degrees Brewing
- Pallasgreen: Ryan's Honey Farm

Food markets located at:

- Kilmallock Farmers Market
- Mitchelstown Market
- Limerick City: The Milk Market

1.9.4. Visitor Information Centres

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

Within the study area there is a Visitor Information Point at Kilfinane.

In close proximity to the study area there is a Discover Ireland Centre at Cahir and Visitor Information Points at Fermoy and Mallow. There is also a community run tourist office at Glen of Aherlow.