

West Cork

Maximising the Benefits of Walking Tourism

Stage B: Recommendations and Conclusions

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Maximising the Benefits of Walking Tourism – Stage B Report: Recommendations and Conclusions

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1 Introduction

1.1 The following report represents the culmination of URS Scott Wilson's investigation into the prospect of maximising the benefits of walking tourism in West Cork on behalf of the West Cork Development Partnership (WCDP). The study has been undertaken in 2-stages:

- Stage A provided a baseline assessment and highlighted a series of key issues relating to the current position of walking tourism.
- Stage B examined the issues in more detail through a consultation process to determine how these issues should be addressed.

1.2 This report reflects the key findings and conclusions of this study process by identifying and providing the rationale for a series of projects and initiatives that aim to secure and strengthen walking tourism as a theme in West Cork. These projects and initiatives will be placed within an action plan to present the 'road-map' that the partners, agencies, and other stakeholders should follow to realise this potential.

Study Aims and Outputs

1.3 The principal aim of this study is to devise an economic vision, strategy and roadmap that will assist local stakeholders in maximising local economic benefit from sustainable economic activities derived from/associated with walking tourism.

1.4 The main outputs of the study are as follows:

- Assess the opportunities for sustainable product development (e.g. accommodation, food service, ancillary services, complementary economic activities, etc.).
- Consider the necessary marketing requirements and recommend appropriate methodologies including the use of digital media.
- Identify best practice in economic development and environmental management in other walking tourism destinations within Ireland or overseas.
- Consider the current agency supports necessary to maximise local economic benefit.
- Assess the available transport linkages and logistic options, e.g. (flight/ferry transfer, pick-up, transfer of baggage, etc).
- Consider the development of walking tourism in tandem with other outdoor /adventure activities.
- Consider the appropriate local training and development needs (e.g. Tour Guiding, Customer care, etc.).
- Identification and consultation with relevant stakeholders and consideration of the establishment of relevant cluster groups.
- Consider the financial resources necessary and assess the availability of appropriate financial contributions from stakeholders to build medium term economic sustainability.
- Determine how local "buy in" and participation can be optimised, working with existing and potential stakeholders.

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- Develop a recognisable destination walking image and identity for the West Coast linked to the established West Cork Fuchsia brand (www.westcorkaplaceapart.com).
- Conduct a SWOT Analysis and determine appropriate strategic actions.

2 Summary of the Key Issues

Overview of Walking Tourism in West Cork

- 2.1 As identified in the Stage A investigation process, West Cork already has the basis for a successful walking destination in the form of a series of named trails from which walking tourism can be packaged and promoted, especially in relation to its West Coast. The Beara Way and The Sheeps Head Way Western Trail are both designated as one of Ireland's 43 National Trails; the Sheeps Head Way Eastern Trails is developing a reputation as being a long-distance pilgrimage trail; and the National Looped Trails associated with the area are being extensively promoted to the walking market.
- 2.2 Fundamentally, each of these walks travel across a landscape that can be described as being of outstanding natural character, reaching heights that afford wide panoramas of the area's mountainous, coastal, and countryside landscape. The inclusion of the islands of Bere, Dursey, Garnish and Whiddy which are also looking to draw visitors in for walking further strengthens this appeal and provides a 'unique selling point' and differentiator from other walking destinations in both Ireland and the UK. By no means least, the area's association with the Beara-Briefne Way, a long distance trails that follows a 14-day march undertaken by Donal O'Sullivan Beara and 1,000 supporters; and the E8, Ireland's only coast-to-coast route that stretches from Castletownbere to Dublin further reinforces the premise that West Cork's West Coast in particular could act as a walkers hub that can cater for the different elements of the walking market – i.e. from a gentle woodland stroll through to long-distance, point-to-point challenges.
- 2.3 The audit of existing amenities has determined that much of the support structures are also in place to accommodate walking visitors with the towns of Bantry, Glengarriff, Castletownbere, and Kenmare (part of South Kerry but on the Beara Way) providing accommodation and catering services. The smaller villages too have a critical and strategic role to play in this regard, with Adrigole, Ardgroom, Allihies, Eyeries, Tuosist on the Beara Way; Durrus, Kilcrohane and Ahakista on the Sheeps Head Way Western Trails; and Drimoleague and Kealkill on the Sheeps Head Way Eastern Trails; all providing potential start/stop-off points for walkers using the trails and in delivering support services.
- 2.4 However, despite this provision, West Cork as a destination and its West Coast as sub-region does not currently feature as highly as other destinations in Ireland for walking (e.g. the Dingle Way and Killarney National Park in County Kerry). This position is not assisted by the fact that Ireland has a comparatively weak profile for walking when compared with Scotland, Wales and England, with these countries benefiting from far greater public access rights to the countryside.
- 2.5 In this respect, the investment in establishing the trails, their subsequent management and maintenance, and in developing support services has required the co-operation of local community groups, local landowners, regional and national agencies. These interfaces indicate a strong support for walking tourism and the achievements that have been made to date should be applauded. Nevertheless, for West Cork to be maximise the opportunity that walking tourism presents as an important tourism theme, it is clear that all stakeholders would benefit from a strategic vision and direction to enable greater co-operation and co-ordination in relation to developing and promoting walking tourism in the area.

- 2.6 The key purpose of this study, therefore, is to consider the future development and improvement options and opportunities that will position West Cork as a destination of international walking tourism repute; and to establish a defined vision, strategy and delivery framework based upon an understanding of the benefits that they will provide.

Focus 'Walking Tourism' Theme on West Cork's West Coast

- 2.7 Before determining the recommendations for maximising the benefits of walking tourism in West Cork, it is necessary to redefine the terms of reference and particularly the geographical area of focus.
- 2.8 As defined in the Stage A investigation process, although the West Cork area has a range of different walks, it is felt appropriate to focus attention on the West Coast of West Cork and its immediate hinterland as the 'walking destination' of West Cork. The rationale for this is based upon the following:
- The outstanding landscape character of the Peninsula's and Islands that form the West Coast are sufficiently different to that of the gentler countryside setting of Kinsale, Clonakilty, Macroom and so on.
 - Two of the existing long-walks are designated as National Trails by the National Trails Office (NTO), and moreover the NTO firmly believes that these routes could be of international standard.
 - The Beara Way in particular includes a unique proposition of peninsula and island walking options.
 - The Beara Way also links into other national and long distance walks (The Beara-Briefne Way and the E8 trail between Castletownbere and Dublin).
 - The local communities have identified a reliance on walking as a key tourism theme and they have already started to establish services tailored to the needs of walkers.
- 2.9 When combined, these factors indicate that the West Coast has the capacity to be presented to the tourism market as a destination of interest in its own right, with the principle theme being walking. It is for this reason that, as an initial recommendation, the focus of walking tourism as a saleable theme that attracts walking holiday-makers in West Cork should be focussed on its West Coast area. The implications of this in terms of branding and promotion will be explored in the 'Building Awareness' recommendations in Section 3.
- 2.10 However, this observation should not preclude the other walking trails in West Cork being developed and promoted. Rather, for places such as Kinsale and Clonakilty, the strength of the other assets appear to be more important as a motivation to visit these places. Within this context, the Seven Heads Trail, the National Looped Trails and Sli Na Slainte trails all provide valuable parts of the overall package that will support longer and more rewarding stays in this area. Indeed, the heritage walks of these towns have greater prospects in terms of encouraging visitor spend than countryside trails will. As such, these walks will still need to be continually managed to ensure that they deliver a rewarding, prosperous, and sustainable experience of all of the different landscapes, features and assets that West Cork has to offer.

- 2.11 Nevertheless, for the purpose of this study, and as a means of establishing a flagship walking destination in Ireland, it is West Cork's West Coast that offers the greater potential.

Strengths and Challenges

- 2.12 The investigation process has highlighted a series of issues that need to be addressed in order to achieve greater benefits from walking tourism. The following seeks to summarise the key strengths and challenges associated with walking tourism as determined by the investigation process. This evidence will help shape the rationale for the recommendations to be included under the key pillars for growth for walking tourism.

The Character of the West Coast Walking Trails

Strengths

- West Cork's West Coast has an outstanding natural character and natural heritage that compares with areas that are officially designated for their outstanding natural beauty and natural heritage value (e.g. UK's Area's of Outstanding Natural Beauty/National Parks/ Heritage Coast).
- The landscape setting invites exploration that, when combined with the walking trails, provides a key motivation for walking tourists and day visitors. In particular, the heights that can be reached at Hungry Hill, Sugarloaf Mountain, and the Sheeps Head ridge provide stunning vantage points over Bantry Bay and the wider Atlantic Coast of County Cork and County Kerry.
- The combination of the three peninsulas, which vary in character, and their islands form a general setting that has the potential to form a visitor destination in its own right.
- The character of the landscape across this area varies between sandy beaches (Mizen Peninsula), rugged cliff-lined coast, mountain highlands (particularly Beara Peninsula), and gentler undulations of hinterland countryside. Each landscape character provides a different but equally important type of walking experience.
- The landscape character means that the walks are generally associated with robust land that, at present, are not demonstrating obvious signs of stress caused by walkers. This suggests that the walking trails can, from an environmental perspective, support additional walker volume.
- Walking tourism within the West Coast of West Cork is estimated to be worth an estimated €13.9 million at present, supporting 353 full time equivalent jobs.

Challenges

- Although the vast majority of the walking tourism resources are contained within the West Cork area, there are other administrative organisations that have a vested interest in the area as a walking tourism destination. This includes Cork County Council and Comhar na nOileán Teoranta which is the agency overseeing the development of the islands. As a section of the Beara Way crosses into County Kerry, the landscape character and the Beara Way as a tourism resource should also be considered a shared with Kerry County Council and the South Kerry Development Partnership.
- The protection of the landscape character of the peninsulas and the hinterland areas needs to be considered a priority, with any development that is designed to support

tourism in these rural areas needing to be sympathetic to the overall character of the landscape.

- The condition of the trail routes and the threat of footpath erosion will need to be managed, especially if walking (and other activities) increase significantly.

Existing Amenities, Services and Capacity for Growth

Strengths

- The two designated National Trails, 23 National Looped Trails, and a series of other trails (Sli Na Slainte, Drimoleague Heritage Trails, Seven Heads, and so on) all present a significant strength for walking in West Cork.
- The range of trails offer good variety in length, duration, and challenge. It is this variation that tourism businesses believe is the main strength for walking tourism in the area.
- Community groups have been the driving force behind developing the walks, which in turn have been supported by agencies such as Fáilte Ireland, WCDP, the NTO and other national and regional agencies.
- The difference in character of the main walks (The Beara Way, the Sheeps Head Way Western and Eastern Trails) is such that they combine to present complementary rather than competing walking products that, if presented properly, will appeal to different walking markets.
- There is generally a positive feedback on the trails from visitors with the opportunity to undertake scenic, coastal and hill walks being considered the most enjoyable aspects of walking in the area according to tourism businesses.
- There is a high level of perceived satisfaction amongst walkers in relation to the condition of the walking paths (73.7%), the variety of walking routes (78.3%) and length of the routes available (79.4%) according to tourism businesses.
- The current training of Walking Guides will help improve quality of the experience for different elements of the walking market.
- There is generally a good level of accommodation associated with the two National Trails and there is spare capacity within this accommodation stock to be able to support additional walking holidaymakers.
- Accommodation operators and other enterprises are actively responding to the growing sense of the importance of walking as a 'theme' and are introducing initiatives designed to meet their needs (e.g. bag carriage services, local map provision, walk recommendations, packed lunches, walker drop-off/pick-up services).
- There is also evidence of 'walk' packaging services that support guided and self-guided groups through tour operators.
- There is positive usage of trails as determined by the counts on the Beara Way and the Sheeps Head Way when compared to other trails nationally.
- There is an identified international appeal of walking holidays with walkers coming to walk in West Cork year-round and in any weather – especially from Holland and Germany.

- Public transport services from Cork and Cork International Airport are available to Bantry, Glengarriff and Kenmare, with some provision extending onwards to Castletownbere.

Challenges

- The availability of walks is currently only ensured through payments through the Walks Scheme. There are no current opportunities to extend the trails or create new trails with the Walks Scheme closed to new entrants. Questions also remain over the continuation of this scheme beyond the existing 5-year contract.
- The condition of sections of the trail routes (as defined by the NTO Audits) remain an issue, particularly the reliance on on-road sections.
- The peripheral location of West Cork in Ireland and, indeed, the peripheral location of the key walks in West Cork (i.e. the peninsulas of West Cork's West Coast) present a perception barrier concerning access difficulties, potentially inhibiting visits.
- The main trail access points and trail information lack clarity in certain key places, particularly from the key towns and villages. Likewise, descriptions of how to access the trails can be confusing with some references to 'start where you want' and others stating that the 'trails starts at'.
- There is also a lack of important information at the trail access points, especially in relation to distance and appropriate 'time allowances'.
- A lack of guided walks (50%) was identified as being a key barrier to encouraging more walking holidaymakers to West Cork according to tourism businesses. A lack of information on the walks (47.2%) was also highlighted as a key issue to encouraging more walking holidaymakers to West Cork.
- Co-ordination of services (e.g. bag carriage, drop-off/pick-up, packed lunch, etc) is not universal and is not well advertised to walkers prior to their arrival.
- Some local services identify walkers as a nuisance due to lack of spend and use of facilities, especially toilets, rather than an opportunity with some notable 'stories' of poor service.
- Although there is a reasonable amount of accommodation stock supporting tourism across the West Coast area, there are still some spatial gaps. In particular, there is a lack of accommodation associated with the Sheeps Head Way Western Trails with most of the observed stock concentrated in Bantry. In addition, there is very little accommodation outside of Bantry available to support walkers on the Sheeps Head Way Eastern Trails.
- There is a lack of dedicated 'walker-orientated' accommodation supporting point-to-point walkers on the National Trails, with Fáilte Ireland not supporting through its grading system certain types of accommodation (e.g. bunkbarns) that is known to have a direct synergy with walking. This position is now being reviewed by Fáilte Ireland.
- There is a lack of local transport services that would potentially service walkers (i.e. main trail access points).
- Certain amenities (i.e. public toilets) are identified as being a current gap in provision locally, especially in villages.
- There is a high level of management demands on certain sections of the trails in terms of pathway, signage, and stiles.

- Interest in/groups taken to West Cork by walking tour operators is not perceived to be as high as elsewhere in Ireland – e.g. Dingle Way, Killarney National Park.
- Some of the Looped Trails are located in fairly remote locations that can only be reached by car.
- The key trails lack interconnectivity between them from a marketing and thematic perspective, with each trail acting as a separate entity.
- The Mizen Peninsula does not have a long-distance circular walk to complement the Beara Way and the Sheeps Head Way, yet the three peninsulas represent the key landscape features of West Cork's West Coast.
- The public transport services, although available, lack capacity to facilitate a significant volume of additional walkers arriving via Cork Airport as the primary international gateway.
- The public transport timetables are not well publicised, easily understood or integrated with local services.
- There are no retail outlets supporting walking (or other outdoor activity) enthusiasts.

Building Awareness

Strengths

- West Cork already attracts both domestic and international audiences and has accessible gateways.
- The main trails are identified on the Ireland's visitor information/promotion websites (discoverireland.com, discoverireland.ie) and the Irish Trails promotional website (irishtrails.ie)
- Regional (westcorkaplaceapart.com) and local websites (bearatourism.ie; thesheepsheadway.ie; drimoleagueheritagewalkway.com) also promote long-distance, looped walks and local trails.
- The main trails are packaged and sold as guided and self-guided walking tours through dedicated walking tour operators (e.g. South West Walks Ireland, Hillwalk Ireland).

Challenges

- Directional/information signage from Cork City and Cork Airport to West Cork's West Coast is currently lacking.
- The main pre-arrival information sources promoting walking tourism in Ireland (discoverireland.com, discoverireland.ie, and irishtrails.ie) each appear to have differing information and messages on the same walks in West Cork, including the difficulty/challenge levels of the Beara Way for example.
- Different sections of the Sheeps Head Way Western and Eastern Trails have their own separate names and, in some cases, branding which can be confusing.
- The 'National' designation of the Beara Way and the Sheeps Head Way trails is not being maximised in terms of raising the profile of these walking routes locally, regionally, nationally or internationally.
- The profile of walking trails locally, including in the primary Tourist Information Centres of Bantry and Glengarriff, is limited.

- There is a lack of walking events to help raise the profile of walking and co-ordinated walking breaks.
- Some of the National Trails are seemingly in remote locations and some promotional material lack details on the key features of interest (e.g. wildlife, heritage, family, woodland, etc) that walkers could discover.
- The use of other landscape characteristics (e.g. 'Highlands and Islands' of West Cork) are not always explicitly identified in marketing and promotional literature associated with walking.
- There is a lack of consistent messages, imagery and identity to reinforce the view that West Cork's West Coast is one of the primary walking destination in Ireland.

3 Maximising the Benefits of Walking Tourism in West Cork

- 3.1 The following section provides the vision, key objectives and recommendations for action in order to maximise the benefits of walking tourism in West Cork's West Coast.
- 3.2 As a point of clarification, we suggest that the Sheeps Head Way Eastern Trails which, at present is a series of walks that are fairly complicated to understand from a walkers perspective, be branded as the 'St Finbarrs Pilgrims Trail' in order to better distinguish this part of the network from The Sheeps Head Way and the Beara Way. This trail name - the 'Pilgrims Trail' - will emphasise that walkers are treading in the footsteps of important part of local history. To reflect this position, we will refer to the Sheeps Head Eastern Trails as the 'Pilgrims Trail' in the remainder of this report.

Vision and Principal Objectives

- 3.3 In order to maximise the benefits of walking tourism in West Cork, we believe that it is first necessary to set the parameters for achieving success through the creation of a vision and the key objectives to achieve a more coherent and prosperous tourism sector in West Cork's West Coast.

Vision

- 3.4 In establishing a vision for walking tourism in West Cork's West Coast, it is imperative to recognise why visitors would find walking in this area rewarding; namely to explore and discover the key features of the West Coast as an outstanding natural landscape. As such, the following vision statement should be adopted in terms of establishing walking tourism products and packages:

To harness the outstanding natural character of West Cork's West Coast and hinterland to establish this area as a distinctive walking tourism destination; to underpin a vibrant and sustainable visitor economy; and to actively support the conservation of this landscape both now and in the future.

- 3.5 Fundamentally, through this vision the West Coast is to become synonymous as a destination where walkers of all types and ability can have a rewarding, high quality and diverse walking experience. The vision will also seek to integrate communities, businesses, landowners and national, regional and local agencies in delivering common goals, projects and initiatives.
- 3.6 The main premise is to utilise the prospect of exploring the West Coast's peninsulas, islands, rugged coast and hinterland by clearly defined walking trails as a driver for developing greater recognition of walking tourism as a theme for the area that in turn will deliver new markets, support new products, and present further economic opportunities. At

every stage, therefore, it is important to ensure that the environmental character of the West Coast is conserved, including the management of visitor impacts where appropriate.

Pillars for Growth

3.7 The vision provides the overarching framework for developing walking tourism in the West Coast. The following represent the key pillars upon which this vision for growth can be achieved:

- Maximise the inherent value presented by the outstanding natural landscape of West Cork's West Coast and its hinterlands.
- Strengthen the existing support for walking tourism by tailoring existing services and providers to better cater for the different walking tourism markets.
- Build capacity for walking tourism by developing new provision that will better present the West Coast destination as a place for walking.
- Build awareness of walking tourism through marketing and promotional messages that will better capture the imagination of different walking tourism markets.

Key Objectives

3.8 For each pillar, the following key objectives can be determined:

- Maximise the inherent value presented by the outstanding natural landscape of West Cork's West Coast and its hinterlands:
 - Use the outstanding natural landscape as the principal image for the West Coast, inviting visitors to explore by walking.
 - Ensure that the quality of the natural environment is retained and conserved.
 - Ensure that the design of the walking trails and any associated furniture is sympathetic to the landscape.
 - Promote a 'Leave no Trace' philosophy amongst walkers using the trails.
- Strengthen the existing support for walking tourism by tailoring existing services and providers to better cater for the different walking tourism markets.
 - Engage communities in Fáilte Ireland's 'Walkers Welcome' initiative.
 - Establish the key towns and villages as the trail access points.
 - Ensure that each of the principal walking trails fulfils the existing 'Management Standards' and future 'International Standards' as defined by the NTO.
 - Improve the segmentation of the principal walking trails.
 - Develop the challenges/themes associated with other (looped) walks.
 - Raise awareness of the trained 'Walking Guides'.
- Build capacity for walking tourism by developing new provision that will better present the West Coast as a walking destination:
 - Encourage 'walker friendly' transport connections from international gateways.
 - Improve local transport services facilitating the principal walking trails.

- Establish a series of new ‘walker friendly’ accommodation provision at strategic locations.
 - Subject to future funding arrangements, look to develop a ‘South West Coast Path of Ireland’ by creating a new walking trail on the Mizen Peninsula.
 - Actively encourage walking/outdoor activity retail at key centres.
 - Build awareness of walking tourism through marketing and promotional messages that will better capture the imagination of different walking tourism markets:
 - Establish a distinctive ‘destination’ brand for West Cork’s West Coast as a walking/outdoor adventure hub.
 - Establish clear marketing and packaging activities for walking at the pre, during and post visit information gathering process.
- 3.9 Each of these objectives, and the specific actions arising from them, are discussed in more detail below.

Maximise the Inherent Value of the Outstanding Natural Landscape

Use the outstanding natural landscape as the principal image for the West Coast, inviting visitors to explore by walking (and other activities).

- 3.10 Leisure walkers generally walk for a specific purpose, be it something as simple as undertaking a pub walk through to the challenge of completing a long distance or difficult trail. In terms of high quality natural settings, it is usually the chance to explore up close the natural heritage of the destination, discover key features of interest, and reach key vantage points that motivates walkers. In this respect, it is unsurprising that the principal walking destinations worldwide generally coincide National Parks for instance.
- 3.11 As previously highlighted, West Cork’s West Coast, in our view, presents an area of outstanding natural landscape that is certainly on a par with many high quality landscapes in Ireland and the UK. In this respect, an anecdotal comment from a local tourism enterprise was that they receive repeat guests from North Cornwall, a designated Area of Outstanding Natural Beauty and Heritage Coast, because West Cork’s West Coast ‘reminds them of Cornwall, but without the tourists’.
- 3.12 Fáilte Ireland is, in the near future, to complete a series of destination development projects based upon 10 destination areas and up to 30 sub-regional destinations. We believe that the timing is now right to recognise West Cork’s West Coast as an area certainly worthy of being a sub-regional destination due to its outstanding natural character and the inherent market potential that this could support. Walking tourism is certainly one of these markets, though there are others, especially in the activity sector such as cycling, watersports, coasteering, that could also be considered (see Section 4).
- 3.13 For the area to be presented as a destination, the West Coast needs to utilise all elements of its outstanding natural character. This will include the collective value of the peninsulas, islands, rugged coast and hinterland environment. This will ultimately require the co-

operation and co-ordination of activities between the two County Councils and three LEADER Companies. This is explored further below.

Ensure that the quality of the natural environment is retained and conserved

- 3.14 As a continuation of the above, it needs to be understood that any change to the character of the natural environment and landscape could have serious implications in respect of the future success of walking tourism/outdoor tourism in the West Coast.

- 3.15 A cursory overview of the planning policy of County Cork and County Kerry suggests that the landscape importance of the West Coast is not only recognised for its intrinsic value as places of natural beauty, but also because it provides a real asset for residents and visitors alike in terms of recreation, tourism and other uses. In particular, policy set out in the Cork County Development Plan and the Bantry Electoral Area Local Area Plan ensures that specific development proposals will be assessed against the impact on the receiving environment suggesting that a balance of conservation and future development will be considered. Planning policy also ensures that a high standard of integration is met in terms of siting and landscaping of proposed development. Specific parts of the area are also designated as Scenic Landscape which provides an additional level of protection, and ensures that development proposals do not have a negative impact on the scenic value of these areas. Similarly, the strategic development objectives of the LEADER companies managing the economic development of the area recognise the importance of tourism to the economy and the value of the landscape in attractive tourists.

- 3.16 Whilst all of this is encouraging, a question remains over the implications of the accumulation of development in this area and how on the Beara Peninsula, where cross-boundary issues are of specific relevance, future development is considered. This is an important premise in that the landscape character is fluid across the administrative boundaries; visitors tend to only really understand national boundaries; and that the Beara Way and Pilgrims Trail will be consumed as a whole rather through these administrative areas.

- 3.17 To act as a comparison, in the UK, such instances have, to a certain extent, been overcome by designating a landscape such as the West Coast as an 'Area of Outstanding Natural Beauty' or Landscape Conservation Area. This has resulted in an area 'management plan' that creates a series of shared conservation guidelines and parameters that will be incorporated and considered between the different local authorities where the landscape is clearly a shared resource between them.

- 3.18 It is beyond the scope and remit of this study to examine this in further detail and there is certainly no indication that the local planning authorities are not applying best practice. However, it is our view that, in order to ensure that the natural character of the West Coast is retained and conserved, the parameters for managing and improving this shared resource be clearly defined through shared policy, especially in terms of development and design. This would accord with the South West Regional Planning Guidelines that stipulates that the Council's should co-ordinate policy on environmental issues that have a cross border impact. This includes the assessment of landscape character, particularly in border areas; common approaches to consideration of development proposals in border areas of similar character (i.e. wind farms, masts, forestry, etc.); protection of water sources, aquifers and surface water; approaches to coastal zone management and

uplands development; and any other issue which local authorities consider to have an inter-county impact.

Establish design parameters to ensure that any associated furniture for the walking trails is sympathetic to the landscape

- 3.19 Within this context of retaining the natural character of the West Coast, it is also important to consider the appropriate and sympathetic development of the walking trails themselves. Although on the whole the walking trails are increasingly forming part of the fabric of countryside settings, there is still a need to ensure that any associated furniture and amenities (e.g. information boards, signposting, stiles, gates, etc) are sympathetically designed to blend into the landscape.
- 3.20 We appreciate that there is a balance that needs to be achieved in terms of functionality, durability, cost, future management and design of any structures created. However, it is our view that, of these considerations, design should be given greater weight in the evaluation process, with the overriding premise being that the design should complement and not detract from the environmental character of the setting.
- 3.21 As a case in point, the consultation process has highlighted general support locally for the steel stiles of the Beara Way, with a key factor being their durability and low management/maintenance costs. We do not dispute the fact that the stiles meet all of the required standards, but we believe that the material used (steel) and the distinctive painting (green and yellow) provides a stark contrast to the natural character of the environment that walkers will walk through. Whilst these stiles may not seem to be a major part of user experience, they may well be remembered and compared to other walking trails nationally (including the Sheeps Head Way which uses wooden and stone stiles) and internationally, with the use of steel stiles by no means universally used on trails in other settings of high environmental value such as National Parks.
- 3.22 As identified in the Stage A report, we believe that, for the benefit of the environmental character, these stiles should be replaced over time. We concede that this may not be a priority in relation to the future investment due to the fact that they are so durable and have many years of life left in them. Nevertheless, it is the premise that we feel is the most important aspect in that any structure on the trail has the ability to detract from the quality of the natural environment and thus may ultimately be of detriment to the long-term sustainability of walking on these trails. Therefore, by designing these structures more sympathetically by using materials found locally (e.g. wood and stone) they will have much less visual intrusion.
- 3.23 To assist in this process, it would be appropriate to establish some simple design parameters that could be adopted by all parties in relation to the different trails. It is not the purpose of the design parameters to be too prescriptive in terms of the specific design, or indeed that the furniture needs to be designed in exactly the same manner. Rather, the parameters should present a 'palate' of materials and design examples appropriate to overall the landscape setting. It will then be left to the trail managers/local community tourism groups to determine the exact design for each furniture piece against the local setting.

Promote a ‘Leave no Trace’ philosophy amongst walkers using the trails

- 3.24 Within the requirement to retain and conserve the natural character of the environment, it needs to be recognised that tourists themselves can have a detrimental impact. This could manifest in the footpath erosion/trampling, littering, disturbance of wildlife/habitats, and the disturbance of livestock which in itself forms an important part of the landscape fabric.
- 3.25 ‘Leave No Trace’, an Outdoor Ethics Programme in Ireland designed to promote and inspire responsible outdoor recreation through education, research, and partnerships, seeks to address these issues by building greater awareness and positively influencing behaviour. The key principles of Leave No Trace are as follows:
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
- 3.26 These principles and the broader messages of ‘Leave No Trace’ need to be replicated and reinforced across the West Coast. This includes reference to ‘Leave No Trace’ in all accommodation establishments, at the main trail access points (see below), and at other information points.
- 3.27 One issue that has been highlighted by local landowners is in relation to walkers inadvertently leaving gates open. Similar incidents in other areas have been overcome by placing stiles and kissing gates¹ next to livestock gates as a means of negating the requirement of most walkers to open gates. Where this is not possible, some form of weighting could be used to ensure that gates are forced shut to a locking position after opening rather than simply relying on the walkers to close it. These types of measures need to be part of any management plan for the walks themselves.

Strengthen the Existing Support for Walking Tourism

Engage communities in Fáilte Ireland’s ‘Walkers Welcome’ initiative

- 3.28 As highlighted in the Stage A report, the excellent work of the community groups as key drivers, the landowners as key facilitators, and the key agencies in supporting the development of walking products available in the area needs to be applauded. The energy, enthusiasm and commitment of each organisation needed to enable and co-ordinate the landowners and pathway tasks should not be under-estimated. Without this commitment, there would be little in the way of provision to support any form of walkers, let alone walking holidaymakers.

¹ A kissing gate is a type of gate which allows people to pass through, but not livestock.

- 3.29 We believe that the effort of the communities needs to be reflected and rewarded through the Fáilte Ireland ‘Walkers Welcome’ scheme. This scheme is designed to actively engage all elements of the community in delivering positive experiences for walkers – from the landowners, to the accommodation providers, to local retail and catering establishments, to local households residing close to the walk.
- 3.30 By involving the whole community, it will be possible to demonstrate the role that each component has in delivering a more rewarding experience for visitors, such as:
- agencies and local community groups in determining and disseminating appropriate information on the travel to the trail and its characteristics, length, duration and key features of interest along the walk through their own marketing and promotion and by passing this onto local operators;
 - accommodation providers in delivering messages of the walking experiences available to visitors through their own marketing, providing maps and appropriate guidance to visitors using the information disseminated from the agencies and local community groups;
 - landowners as facilitators and champions of the walks, and in maintaining the paths, stiles, signage and interpretation boards that cross their land as an essential part of supporting the principal walking product, namely the trails;
 - retail and catering providers in supporting the needs of walkers, acting as information support on nearby walks, and providing services as required; and
 - local residents in providing information support, especially for those who may lose their way on the main pathway or miss-calculate the time required to undertake a walk and need to get back to their starting point.
- 3.31 Each component needs to be given advice and direction to ensure delivery of a positive experience that will ultimately strengthen the ‘Walkers Welcome’ reputation.
- 3.32 One of the criticisms of ‘walkers’ as a market is that they do not spend that much in shops, restaurants and bars. Our response to this is that ‘walkers’ only undertake a leisure walk temporarily and that, once they have completed the walking trail, they will have other needs to be catered for by different services. Therefore, they still represent a significant opportunity locally for other enterprises. This message needs to be reinforced.
- 3.33 Delivery of the ‘Walkers Welcome’ initiative would also have the added benefit of strengthening relationships between the West Coast communities and Fáilte Ireland. A key issue raised locally is that many businesses feel disassociated from Fáilte Ireland, partly because of a perceived lack of marketing, partly because of the perceived high cost of becoming a member of Fáilte Ireland, and partly due to the perceived high (unrealistic) expectations in relation to quality ratings. It is beyond the scope of this report to either confirm or refute these perceptions, however they indicate that there is some degree of dissatisfaction here. Promotion of and assistance in delivering the Walkers Welcome scheme via Fáilte Ireland could go some way to heal some of these tensions.

Establish the key towns and villages as the trail access points

- 3.34 Following on from the above, it is recommended that each of the principal towns and villages be established as a Trail Access Point in its own right. Although there is some evidence that the towns and villages are already being utilised by walkers, this ideally

needs to be reinforced through their designation of official Trail Access Points for their respective trails. The benefits of this type of approach would be to enable:

- walkers staying in different towns/villages to be able to find access to the trail easily and effectively;
- day walkers to gravitate to clearly defined centres and use this as a gateway to the trail rather than starting in random and out-of-the-way places;
- point-to-point walkers to be confident that the end of a day's walk will deliver them to a place that has amenities (i.e. accommodation, catering, communications, transportation) to meet their needs;
- single-base walkers to access all of the trails nearby without the need to use their car, either by walking to the nearest Trail Access Point or using local transport connections to the neighbouring towns or villages; and
- business and enterprise hubs to directly engage with the majority of the walking market to facilitate greater opportunities for economic exchange.

3.35 Each Trail Access Point should be closely aligned to a car park and local and inter-regional public transport networks as appropriate. A dedicated 'walking trails' information board providing the key information on the trail(s) accessible from Trail Access Point should also be available. The board should typically include:

- a map of the trail(s) using colour-coded graphics;
- a brief description of the trail, duration, and key features of interest;
- details of local amenities to support such as 'walker welcome' toilet amenities, refreshments, and accommodation;
- local tourist information sources and sources of additional information (including via mobile technologies);
- safety information, including contact numbers; and
- the message of 'Leave No Trace' along with key guiding principles.

3.36 The amenities provision at the Trail Access Point will be determined by the current position of each town and village. In this respect, it may be a need to establish primary and secondary Trail Access Point so that users can distinguish between the level of amenity at each site. This could be achieved by determining the primary Trail Access Points as 'Trail Bases' to denote that all of the main amenity provision is available at these locations. A term such as 'Trail Rest/Link/Break/Stop' could be used to reflect that there may be more limited provision in certain amenities at the secondary Trail Access Points, whilst still encouraging walkers to use these as natural break points along the route.

3.37 As identified in Stage A, the Trail Access Points for each of the West Coast Trails should be as follows:

- The Beara Way:
 - Primary (Trail Bases) – Glengarriff, Kenmare and Castletownbere
 - Secondary (Trail Rests) – Adrigole, Bere Island, Dursey Island, Ardgroom, Allihies, Eyeries, and Tuosist

- The Sheeps Head Way:
 - Primary (Trail Bases) – Bantry and Durrus
 - Secondary (Trail Rests) – Kilcrohane, Ahakista, and the Sheeps Head Café/Lighthouse

- The Pilgrims Trail
 - Primary (Trail Bases) – Bantry, Drimoleague, Gougane Barra and Glengarriff
 - Secondary (Trail Rests) – Kealkill

Develop a management plan for the principal walking trails to identify the measures and resources required to fulfil the National Trail Office ‘Management Standards’

- 3.38 From a use perspective, it is certainly arguable that long distance trails are less utilised (at least in their entirety) than the shorter looped trails. Indeed, one of the principal reasons Fáilte Ireland embarked upon an extensive programme of developing shorter looped trails is because visitors tend to prefer these types of walks over long distance trails.
- 3.39 Whilst this assessment is certainly accurate from the perspective of visitor behaviour, looped walks generally do not command the same profile as long distance trails, especially at an international level. In this respect, it is unsurprising that some of the best and most iconic walks tend to be long distance, multi-day trails that have the capacity to be undertaken point-to-point – e.g. South West Coast Path (England), West Highland Way (Scotland), El Camino de Santiago (Spain), and Inca Trail (Peru).
- 3.40 For destinations such as the West Coast that is seeking to gain a reputation as a hub for walking, the availability of long distance, point-to-point walking trails are critical; regardless of whether the bulk of walkers actually use the trails in this manner. As a result, walkers seeking a walking-orientated holiday in the West Coast, whether point-to-point or centre-based, will look at the prospect of walking the Beara Way and the Sheeps Head Way and Pilgrims Trail, even in part, as confirmation that this destination is a hub for walkers.
- 3.41 This is not to say that the variety of walks available in the West Coast is not important; in fact they are vitally important. Rather, this recommendation is primarily designed in recognition of the strength of awareness that these trails can provide, which in turn will allow the West Coast to build its reputation as a walking destination. It is vital, therefore, that the Beara Way, the Sheeps Head Way and the Pilgrims Trail are maintained, managed and promoted effectively to deliver a quality walking experience.
- 3.42 The Rural Recreation Officer (RRO) and NTO undertake regular monitoring of the walks to ensure compliance with the NTO’s recommended general Management Standards. At present, neither the Beara Way nor the Sheeps Head Way currently achieve full compliance and thus are only partially accredited. The challenge of managing and co-ordinating the many landowners involved in the Walks Scheme is not to be underestimated here, however overcoming the management issues highlighted by the regular inspections is critical in delivering the quality of experience that walkers demand.
- 3.43 These management issues and measures designed to overcome them needs to be explicitly addressed in a trail management plan; a document that is currently not evident for these walks. This is standard practice for other National Trails both in Ireland and the UK. Indeed, the South West Coast Path has established an action plan covering the full length of its 980 kilometres (South West Coast Path - A Framework for Action 2007-2012).
- 3.44 Much of the information to be contained within the management plan already exists, with the monitoring reports providing detailed analysis on each section of trail. The idea of the management plan is to convert this into a document that contains specific actions to the challenges identified. The key elements that the management plan should cover are:

- The general standards that the management plan is seeking to achieved – namely the NTO Management Standards as appropriate to each of the trails. This should include reference to ongoing objectives such as reducing the lengths of trail that are currently on-road, and general environmental standards that are to be adhered to (see above).
 - Additional information on the strategic importance of the trail as a resource for visitors and locals alike, and a desire to encourage usage and access by all.
 - The key issues and challenges that are currently being faced by each trail in relation to access and use. Much of this is already identified by the annual monitoring process, with the findings required to be placed into specific action points and responsibilities.
 - An action plan that address the issues and challenges, supported by a timeline and resources as appropriate. Some actions will be regular maintenance requirements to be undertaken by the landowner and the RSS; other actions will require additional resources to fulfil. The action plan should help to distinguish between these.
 - Future management, monitoring and research programmes, particularly in terms of monitoring use and gaining knowledge on the users.
- 3.45 It is noted that the Pilgrims Trail is not currently included as a ‘National Trail’, nevertheless the same principles and same standards should apply for this trail also.

Improve the segmentation of the long distance trails

- 3.46 The longer the distance of the walking trail (four-days +), the less likely it is that they will be completed in the one trip, especially when self-guided. ‘Committed Explorers’ are the more likely group to complete these types of trails, not least because of the endurance challenge that they provide. Nevertheless, even the more experienced walkers will generally look to complete one or several sections of a trail on the one trip, leaving scope for a return visit to enable them to complete the trail at a later date. This is a key feature of long distance walking trails with the fact that they can prompt return visits being highly valuable from a tourism perspective.
- 3.47 To reiterate, the Beara Way will take approximately nine-days to complete; the Sheeps Head Way around four-days; and the Pilgrims Trail around four-days (from Bantry to Gougane Barra via Drimoleague). Each of these trails can potentially be connected to create an even longer walk (see below). To allow for different types of walk duration, it is advised that the trails be segmented into sections that can be completed in one day, leaving scope for them to be built into a two, three, five, or nine-day trip to suit the walker and the available trip duration.
- 3.48 Ideally, each segment should cover a minimum of three-hours and a maximum of 10-hours walking time (6km – 20km allowing for ascents) with the average being around six-seven hours (12-14km), remembering that these are long distance challenge trails. For shorter sections, it is advised that walkers be encouraged to explore more of the natural and built heritage of the area, for example entering the Allihies Copper Mine Museum and Café on the Beara Way, the developing the Alice West Museum/Black Gate Centre at Kilcrohane on the Sheeps Head Way, or Gougane Barra on the Pilgrims Trail. These are just a few examples and there may be others of equal interest that should be highlighted. Importantly, all of this information must be available prior to arrival and replicated upon arrival.
- 3.49 There are many different ways to present walking segments, all of which have there pros and cons. We firmly believe that the best method is to ensure that the information is clear,

easily readable (especially when downloaded/printed in black and white), and includes an appropriate section map and a smaller orientation (full route) map. This should be supported by information covering the following:

- Key facts – overall length, time allowance, Trail Base/Rest points, grading, height/ascent (plus turn-back options).
- Trail summary – description of the trail highlighting key landmarks/reference points.
- Key points of interest – heritage, sights, landscape features and any human stories detailing the lives of previous inhabitants (linked to key on the map).
- Transport connections – including up-to-date times of local buses and their direction (i.e. the next Trail Base/Rest stop).
- Safety tips and emergency numbers.
- Key amenities – toilets, catering, accommodation, shops (linked to key on the map).
- Other information sources – online and locally available.

- 3.50 This level of information suggests that any download should be around two-three pages for one section – one containing the map/s at full A4 size and the others providing the information as detailed above. It is advisable that any downloadable print also be available in glossy form from local outlets. Local accommodation operators should also have quick access to online versions for printing.

Develop the challenges/themes associated with other (looped) walks

- 3.51 As identified above, the Beara Way, the Sheeps Head Way and Pilgrims Trail will ultimately act as the main pull-factors for walking holidaymakers, especially international visitors and for longer holidays. However, international and domestic markets will also look for shorter trails within a walking hub to complete as a more suitable option that suits their more limited time constraints. As highlighted above, for some this could include completing shorter segments of longer walks that in turn will encourage repeat visits. For others, it will be more appropriate to identify a series of single 'challenge', 'flagship' or 'interest' walks.
- 3.52 The existing Fáilte Ireland National Looped Trails deliver this type of function, as do the Coillte Outdoors forest trails and forest parks. Nevertheless, it is our view that more could be made of the natural heritage components that visitors could encounter on their walk as an initial enticement. For instance, the investigation process has identified that both Dursey Island and Sheeps Head Lighthouse, at certain times of year, become the perfect places to observe basking sharks, whales and dolphins. For bird watchers, choughs, puffins and peregrine falcons are all known to inhabit these areas. Similarly the Pullen Loop includes features of geological interest including a sea cave. The premise here is that where walks include a feature/s of significant natural or built heritage, these need to be highlighted as features that walkers will discover as they complete the trail.
- 3.53 In the National Looped Walks of Hungry Hill and Sugarloaf Mountain, the West Coast has some very distinctive walks that could be packaged as flagship walks for weekend breaks. Hungry Hill perhaps has the greatest opportunity to act as a flagship 'challenge' trail. This trail has featured as one of Ireland's 'best views' in magazine, Walk Ireland. It combines a steep ascent and some scrambling across blocks of sandstone to a pair of hidden mountain loughs to uncover panoramic views over the coastline of West Cork and South Kerry is certainly an appealing package on its own that can act as a flagship trail. Similarly,

Sugarloaf Mountain is also a potential ‘challenge’ loop, with easy access from Glengarriff and the ascent to its summit affording expansive views over Bantry Bay.

- 3.54 Combining the two loops could also be used to form a ‘West Cork Two Peaks Challenge’. This type of package is reminiscent of weekend trips taken in order to scale Ben Nevis (Scotland), Scafell Pike (England) or Mount Snowden (Wales); with these three peaks also forming the national ‘Three Peaks Challenge’ often undertaken for charity. The West Cork Two-Peaks challenge could be presented as a package that starts at Gougane Barra, scales Sugarloaf Mountain and reaches its pinnacle at Hungary Hill.

Raise awareness of ‘Walking Guides’

- 3.55 The current training of the walking guides is an excellent step in maximising the benefits of walking tourism in West Cork’s West Coast. Once accredited, these guides need to be promoted extensively across the area, particularly within tourist information offices, accommodation providers, catering establishments and so on.
- 3.56 There are a variety of roles that walking guides will play such as in supporting organised tour operators delivering an outdoor experience as part of a package; assisting smaller groups who are less confident in undertaking challenging walking (e.g. beginners, part-time wanderers and committed wanderers); simply providing companionship on a walk; and providing greater interpretation on the local area. It is our view that the ‘added-value’ potential, particularly in terms of interpretation, need to be utilised to maximum effect – i.e. the interpretation of the natural heritage, physical heritage and human interest stories. This will include highlighting some of the other attractions in the area such as the Allihies Copper Mine, Garnish Island and Bantry House for example, and encouraging visitation to these attractions. Providing advice on places to stay, eat and even shop should also form part of their role.
- 3.57 A further role of Walking Guides, and one that was strongly highlighted during the consultation process, was that they need to act as champions of the walking trails amongst the local population as well as to visitors. In this respect, anecdotal evidence already identifies that local operators, farmers and residents have each been called upon to provide advice to independent walkers, be it looking for start-points, information, accommodation and other amenities. These stakeholders have identified that some form of familiarisation of the different walks would be useful to allow them to become much more informed about the walks. Therefore, the trained Walking Guides could certainly be used to help provide this function. In return local stakeholders can also be used to champion the use of Walking Guides to visitors.

Build Capacity for Walking Tourism

- 3.58 Despite the current successes of walking on the West Coast trails it is clear that, as a tourism theme, the landscape character of the West Coast has greater capacity to support more walking holidaymakers than at present. Moreover, there is a clear sense that this, in return, would help to support the local economy to a much greater extent by gearing new accommodation, transport services, and indeed retail around the needs of walkers (see Section 4).
- 3.59 The following highlights key areas where the consultation process has highlighted the new initiatives or developments that could be utilised to better support walking holidaymakers.

Encourage ‘walker friendly’ transport connections from international gateways

- 3.60 In general terms, holidaymakers will look to plan their journeys so that they maximise their time in the destination whilst minimising their travel time and the use of any vacation allowance they may have; all of which will be balanced against travel costs.
- 3.61 The real cost of travel has decreased significantly, particularly for those able to plan ahead and travel off-peak. Walkers certainly fit into this category. Travel to Cork (as a gateway to West Cork) is as cheap from London as it is from London to Glasgow, the closest international gateway to Fort William². Similarly, the convenience of public transport services is roughly comparable, albeit using different forms of transport. For instance, leaving London for a walking short break would probably involved the following travel arrangements:
- Glasgow to Fort William:
 - Outward journey – arriving at Glasgow Airport at 16:35 Friday 18th November, the most obvious transport choice is by train, with 8-services per hour going from Paisley Gilmour Street to Glasgow Centre. From here, travellers will connect to one of the four daily services, with the last leaving at 18:21 arriving at Fort William 22:14. An alternative would be to travel to Glasgow Buchanan Bus Station and catch the 18:00 bus to Fort William, arriving at 21:00
 - Inward journey - On either a Sunday/Monday return, it is possible to get the 11:40 train arriving Glasgow at 16:00, leaving sufficient time to get to Glasgow Airport for either the 19:30 (Sunday 20th) or 18:50 (Monday 21st) flight back to London. The option of the bus would mean departing Fort William at 14:00 on Sunday or at 11:00 on Monday to meet the respective flight times.
 - Cork to Bantry:
 - Outward Journey – arriving at Cork Airport at 15:20 Friday 18th November, the only public transport choice is by bus, firstly connecting to Cork and then onto Bantry. The bus to Cork is reasonably frequent with at least one per hour. Connecting to the 236 bus service from Cork Bus Station would then be possible leaving at 18:30 and arriving at Bantry at 20:15.
 - Inward Journey – On Sunday (20th), it would only be possible to get the 10:30 service back to Cork from Bantry, as the later bus would arrive at Cork Bus Station too late for the 18:05 flight back to London. On Monday the 21st, the 14:40 from Bantry would arrive in Cork at 16:35, leaving plenty of time to arrive at the airport for the 20:00 flight back to London.
- 3.62 Whilst the two destination options are certainly comparable in terms of travel choice, the key element that hinders visitor use of the Cork to Bantry service is the fact that it is only serviced by bus, meaning that any usage is limited to 50-spaces. Being accessible by train and by bus not only gives the traveller more options to would-be travellers, but it also means that it has additional capacity to service Fort William with walking holidaymakers.
- 3.63 This observation is not suggesting that a new rail service needs to be instigated, however it does indicate that the timing and frequency of bus routes between Cork/Cork Airport

² London Heathrow to Cork Airport = c.€90 return on Aer Lingus.; London Luton to Glasgow = c.€75 return on Easy Jet – flight times Outbound flight 18th November to arrive before 17:00; Inbound flight 20th November fly out after 18:00

should be reviewed if the prospect of encouraging walking holidaymakers to arrive via public transport is to be realised.

- 3.64 Alternatively, it may be viable to establish a dedicated mini-bus/coach service/s to support walking holidaymakers and short-breaks, especially in relation to facilitating weekend breaks, as a means of removing the transport connection issue as a barrier to travelling to the West Coast for walking.

Improve transport services facilitating the principal walks

- 3.65 A key issue raised by the Stage A investigation process is the lack of transport options available to walkers as they seek to complete their chosen walks. Public transport has been proven to be an important part of the walking experience for many walking trails and destinations, including Hadrian's Wall (Hadrian's Wall Bus AD122), Norfolk Coast Trail (Coasthopper) and the New Forest (The New Forest Hop-on, Hop-off Tour Bus). For point-to-point walkers, public transport can help in getting them back to their start-point after a couple of days if they are not seeking to complete the trail in one go. For single-base walkers, public transport can allow them to reach their chosen Trail Base/Rest point and then return back to their accommodation base once they have completed the trail.
- 3.66 For the West Coast, the issue of public transport is important because of the fact that a significant proportion of existing accommodation stock is located in the towns of Bantry, Glengarriff and Kenmare. As identified previously, each of these towns represent potential 'Walkers Welcome' gateways and primary Trail Bases for the main walking trails along the Beara Peninsula and the Sheeps Head Peninsula. For these towns to act more effectively as gateways, it is our view that the public transport services facilitating the walks from these centres, ideally through the existing Rural Transport Service (RTS).
- 3.67 Discussion with the RTS highlights that the organisation would be willing to examine ways in which it could respond better to this market, however the services are constrained by resourcing issues. In an ideal situation, the market demand would already be sufficient to support this type of endeavour. However, whilst there are certainly indications that tourism providers take walkers to start points and pick them up at end points along each of the main trails, it is doubtful whether the current levels of demand would support the viability of a dedicated bus service for walkers currently.
- 3.68 It is for this reason that this recommendation is identified in the 'building capacity for walking tourism' objective. As a potential visitor, the prospect of a dedicated walker bus service will again help strengthen the position of West Cork's West Coast as a 'walkers hub'. It will also help to demonstrate to single base walkers that they will not simply be tied to the walks from that base and that they can explore further afield without the need of a car. By no means least, it will also provide a sense of security that the walker has a 'get-back/get to' option should they underestimate the difficulty or challenge of the walk. From a sustainability perspective, it will also alleviate some of traffic pressures that could be experienced in the smaller towns and villages as Trail Rest points.
- 3.69 The business plan for the service will need to be carefully considered, with the prospect of public sector support for the service being realistic in the initial years as the market grows. As a means of at least testing this proposition, we recommend that the bus service be focussed at weekends in the short term to correspond with the larger market demand at this time.

3.70 From each centre, there should be an outward journey in the mornings and an inward journey in the afternoons. The services from both Glengarriff and Kenmare should ideally complete a full circuit of the Beara Peninsula; and likewise from Bantry around the Sheeps Head Peninsula. The services should stop at each of the primary and secondary Trail Access Points identified above.

3.71 Consideration also needs to be given to formalising (or at least advertising) the bag carriage services that are already in place within each of the peninsulas. For point-to-point walkers, this service will be integral to their experience and therefore should be overtly advertised. This is currently not the case for the West Coast, yet it is a service that many operators appear willing to provide. Whether this could be formalised into a dedicated service such as luggagetransfers.co.uk provide for the South West Coast Path would need to be tested. In the interim, messages of 'baggage-transfer facilities available' and 'ask accommodation operator upon booking' should be used to highlight availability.

Develop walker-orientated accommodation at strategic locations

3.72 There is a strong level of accommodation in the West Coast area overall, particularly on Beara Peninsula and in Bantry. Given the generally low-moderate annual occupancy levels (45% for B&B's, 57% for Hotels, 46% for Hostels and 34% for self-catering), it would not normally be recommended that new accommodation provision be considered, with the general premise being that greater concentration should be given first to ensuring that existing accommodation capacity is geared towards walkers – see 'Walkers Welcome' initiative highlighted above.

3.73 However, point-to-point walking as a walking option needs to be supported by the inclusion of dedicated accommodation provision at strategic points along the trail. Without this, and what appears to be happening on both the Beara and Sheeps Head Way, is that walkers need to be transferred to the nearest accommodation provider at the end of a days walk. This position is not ideal.

3.74 Bunkhouses, bothies, camping provision, and a more recent accommodation addition known as 'Pods' can each be created at strategic points to create new provision to satisfy walkers needs where gaps are currently apparent. It is suggested that the following strategic approach is used to address these gaps:

- Beara Way
 - Along the northern shore in places such as Allihies, Eyeries, Ardgroom, and Tuosist – any type of walker friendly accommodation provision would be suitable, possibly with each centre presenting more than one type (e.g. bunkhouse with camping and pod provision).
- Sheeps Head Way
 - Kilcrohane – bunkhouse accommodation associated with proposed activity centre, potentially using temporary accommodation (e.g. camping, large marquee with bunk beds) to test the market.
 - Along the northern shore – bunkhouses and possibly some pods, but any provision must include some element of 'self-catering' due to lack of catering establishments nearby. The investigation process highlights that this is already being considered by at least one current accommodation provider.

- Pilgrims Trail
 - Drimoleague – a proposed accommodation complex has already been identified as part of the investigation process with a combination of self-catering units/pods and camping being considered specifically to accommodate walkers. This should be supported.
 - Site in/close to Gougane Barra – basic accommodation provision complementary to pristine and peaceful setting of the Forest Park and lake. To accommodate walkers and possibly some budget travellers, the use of ‘pods’ and some basic camping provision would be suitable, potentially associated with the existing Gougane Barra Hotel.
 - Kealkill (or other nearby village) – pods/inn/camping provision to facilitate walkers travelling along the Pilgrims Trail from Drimoleague.
- 3.75 These are the options that we consider to be strategically important in relation to supporting point-to-point walkers in the short term. The position of accommodation should be monitored over time to determine whether any further provision is needed in other locations.
- 3.76 Due to the level of existing spare capacity, it is recommended that any new provision be completed in conjunction with existing accommodation enterprises. This means that, where possible, support should be given to those that have demonstrated a long-standing commitment to presenting a high quality tourism experience and/or commitment to supporting walkers. At each location, the overall capacity should be for around 15-30 bedspaces. This would ensure that organised walking tours and independent walkers can be supported at the same time.
- 3.77 The proposed changes to Fáilte Ireland’s quality accreditation scheme to facilitate walker-orientated accommodation should be welcomed. However, it will also now need to take account of new accommodation types – e.g. the ‘Pods’ – if these are also to be supported by funding.

Actively encourage walking/outdoor activity retail outlets at strategic locations

- 3.78 Walking is an outdoor activity that is undertaken outside in variable weather conditions. This factor is one of the reasons walking is so successful as a tourism theme. However, walkers need the right equipment and clothing so that they may pursue the activity in comfort and safety. As a result, outdoor clothing and equipment retail represents a viable retail opportunity to support this market.
- 3.79 It is accepted that many walkers will travel to a walking destination with much of their equipment with them. Nevertheless, given the travel requirement to arrive in West Cork’s West Coast, it needs to be anticipated that some walkers will not bring all of the equipment they need, especially to cover all types of weather eventualities. Moreover, once at the destination, walkers will be more pre-disposed to buying new/the latest equipment and clothing whilst on their trip.
- 3.80 The fact that there is no retail to support walkers (and indeed the outdoor market as a whole) along the West Coast means that this associated retail spend is not currently being realised. Yet, the retail environments in Bantry, Glengarriff, Kenmare and Castletownbere

are certainly conducive to this type of offer. Smaller centres such as Durrus and Drimoleague could also include some element of outdoor activity retail.

- 3.81 As a retail initiative, it needs to be a commercial decision as to whether outdoor activity merchandise is pursued by retailers. In this respect, retailers will need to be convinced that there will be sufficient market footfall to support any investment made. This may not be the case at present for retailers to cover the full range of items or to create a dedicated outdoor retail store. Nevertheless, it would be useful if some retailers could be persuaded to carry some standard items such as maps, outdoor clothing, and compasses in the more immediate future. As the market grows, this could certainly be progressed to include walking boots, gaiters, and walking poles, and even some high-spend items such as optics and GPS systems.
- 3.82 Although it is unrealistic to presume that the West Coast will be able to replicate the outdoor activity retail offer of Fort William (see Stage A report), some provision will again help to reinforce the message that the West Coast is a walking/outdoor hub. Moreover, it will also encourage the walkers themselves to engage with other retail establishments for food and refreshment, ensuring that greater value is secured from the walking market.

Develop a Walking Trail that circumnavigates the Mizen Head Peninsula

- 3.83 As identified in Stage A, a gap in the current provision of walking trails along the West Coast is a trail along the Mizen Head Peninsula to match that of the Beara and Sheeps Head Peninsulas. Although beyond the original the remit of this study, we still believe that this gap needs to be addressed when possible.
- 3.84 It is accepted that the Walks Scheme is currently closed to new entrants, therefore such a proposition is unlikely to materialise in the short and medium term. However, if the long-term security of the trails can be secured, including provision for new entrants, and the walking market in Beara and Sheeps Head Peninsulas is demonstrating strong growth, it is our view that addressing this gap should be explored.
- 3.85 The rationale for this stems from the fact that the Mizen represents the south-western tip of Ireland; it has an easily identifiable 'goal' for walkers in terms of reaching the Fastnet Lighthouse and Mizen Visitor Centre; and the Mizen Head Peninsula has its own distinctive landscape character that is 'different' again to the Beara and Sheeps Head Peninsula's.
- 3.86 It is advised that the trail start at Skibbereen before heading to Balitmore, Balleydehob, Schull, Toormore, Goleen, the Mizen Visitor Centre/Fastnet Lighthouse, Dunlough, Toor, Balteen, Dunkelly, Ballyvonane, and ending in Durrus.
- 3.87 It is beyond the scope of this report to examine in detail the service requirements for any new trail around the Mizen Peninsula, however the principles as identified throughout this section will also apply to any new trails developed in the future.

Develop Ireland's version of the 'South West Coast Path' Trail

- 3.88 The combination of the Beara Way, Sheeps Head Way and Pilgrims Trail points to the prospect of Ireland's South West Coast Path to replicate and rival that of the UK's South West Coast Path.
- 3.89 The UK's South West Coast Path is a highly popular resource that brings significant benefits to the South West of England both in terms of general economics, lengthening the

tourism season, and reinvigorating the tourism economy year-on-year. In this respect, the South West Coast Path Association (SWCPA) has anecdotal evidence that some walkers have taken up to 40-years to complete the full extent of the South West Coast Path, although most achieve it in around 3/4/5 years. The SWCPA also sends 250 South West Coast Completion Certificates per annum, but it firmly believes that the number of walkers who have actually complete the full extent of the trail is much greater than this.

- 3.90 The importance of this is that every walker completing the trail represents around 50-days of walking to complete 980-km trail (assuming an average of 20-km walked per day) in the South West. At average spend of €75 per night, this equates to around €3,750 spend per walker. This means that the 250 walkers who officially completed the trail in 2010 were worth €937,500 in total. Moreover, this is repeated year-after-year.

- 3.91 A South West Coast Path for Ireland would potentially have a similar benefit. The basis for this trail already exists with the existing trails able to lead a walker from Kenmare to Durrus. The addition of the Mizen Head and in particular the Mizen Visitor Centre/Fastnet Lighthouse as the main goal would further enhance this proposition.

- 3.92 Fundamentally, the combined trail will be able to be segmented into a series of weekend, week and even multi-week trips that would almost guarantee repeat visits to the area year-on-year to support and revitalise the wider economy. Furthermore, the concept has a clear resonance with the British walking market, meaning that those who have completed with South Wets Coast Path in England could be targeted to complete the same type of challenge in Ireland. In this respect, it could be worth forming close relations with the SWCPA to help realise this potential.

Build Awareness of Walking Tourism

Establish a distinctive 'destination' image and awareness for West Cork's West Coast as an walking/outdoor adventure hub

- 3.93 As identified in Stage A, through the Fuchsia logo and associated "A Place Apart" tagline (www.westcorkaplaceapart.com), West Cork already has an area 'brand' that is being utilised to sell the area as a destination, to promote local produce, and to encourage a greater cultural identity amongst its residents. The brand is now 13-years old and has 178 members, including 82 tourism enterprises.

- 3.94 From a tourism perspective, 'A Place Apart' delivers connotations of West Cork being somewhere different and somewhere special. As an area of outstanding natural landscape character, the West Coast more than accords with this description. However, given the different landscape character between West Coast and the eastern area of Clonakilty and Kinsale, the challenge is to ensure that the West Coast is given a suitable image and identity that can be used as a platform upon which to utilise its landscape character and trails to attract walkers to greater effect.

- 3.95 It is important to remember that the West Coast has a lot of competition nationally and internationally with Killarney, the Dingle Way, the Western Highlands of Scotland, the South West Coast Path in England, Northern Spain's Camino del Santiago, the Brecon Beacons in Wales, and the Peak District in England, each providing popular walking destinations, to name but a few. In order to compete more effectively and to position the West Coast within this broader market place, it is our view the West Coast needs to be

given its own image and identity within the Fuchsia branding. This will require presenting clear images of the area's key characteristics of uplands with stunning panoramas, rugged coastline and its natural heritage. This should be accompanied by some form of area description – e.g. 'West Cork's West Coast', 'Ireland's Wild West Coast', 'the Atlantic South West', 'The West Cork Peninsula's', 'The Peninsula's and Islands of Ireland' - and some form of strap that draws attention to the fact that it is a peaceful, tranquil place and a place that from the consultation experience, the phrase 'Peace be with You' appears to be used as a farewell greeting between local residents. An adapted version such as Peace is with You or Let Peace be with You could be used – i.e. 'The West Cork Peninsula's, Let Peace be with You.....'. Another option could be to use the activity as the strap line i.e. 'West Cork's West Coast... Walk this Way'.

- 3.96 This message would complement and enhance the Fuchsia brand by further defining why West Cork is 'a place apart'. It will also help to define more concisely the West Coast as a collective area that can support walking and outdoor adventure but within a surrounding that offers peace, tranquillity and escapism – traditionally important messages for high value landscapes.
- 3.97 There is some concern locally amongst the key local groups that a new brand could make their own efforts in terms of place and/or trail branding redundant. However, this need not be the case. Tourism is essentially about geography. Visitors will choose a geographical place to visit, but the definition of that 'place' can range from being geographically very wide (e.g. Europe) to very specific (e.g. Bantry/Castletownbere/Bere Island). The role of destination branding is to help guide visitors to the types of places and spaces they should be visiting on their trip. This is achieved by narrowing the spatial references so that key places on their itinerary can be described much more succinctly. This could start with the country (i.e. Ireland) a regional reference (the South West), then sub-regional (County Cork, West Cork, or West Coast) and then place specific (i.e. the Beara Peninsula, Sheeps Head Peninsula, Bantry, Bere Island, and so on). As long as each brand works in support of the other by presenting complementary messages, each brand should be able to retain its own cognisance.
- 3.98 The fact that Fáilte Ireland is currently exploring its regional and sub-regional 'destination' brands represents a good opportunity for the whole of West Cork to revisit its branding position and, within this, to understand how the West Coast should be presented and positioned. In this context, we would recommend that the West Coast is worthy of being a sub-regional destination.

Establish clear marketing and packaging activities for walking

- 3.99 Walking is a popular activity amongst all of the key international markets for Ireland. Walking is also improving in popularity domestically, which too presents tourism opportunities.
- 3.100 As identified in Stage A, different walker types seek different experiences. It is important to ensure that the existing walking trails are matched and targeted towards the market characteristics. In this respect, the three principal trails are likely to have a slightly different market appeal:
- The Beara Way, as a more challenging trail in terms of length, ascents and descents is likely to have a greater appeal to Part-time Explorers, Committed Wanderers and Part-

time Wanderers. The trail may not be challenging enough to suit committed explorers due to lack a trail variations (i.e. there are no prospects to go 'off-trail').

- The Sheeps Head Way has greater prospects amongst Beginners, Part-time Wanderers and Committed Wanderers, with a key selling point being the flexibility for these walkers to create their own route preferences whilst retaining a sense of comfort and safety.
- The Pilgrims Trails will likely have greatest appeal amongst Part-time Wanderers, although some of the trails would also support Beginners. The purpose of 'pilgrimage' to honour St Finbarr should also be brought to the fore, with the connotations of following in his footsteps likely to attract a variety of walker types.

3.101 In terms of overseas markets, the West Coast has, according to local operators, gained a good reputation amongst Dutch and German visitors, a position that needs to be pursued further through both air and sea connections available at Cork. Britain is the largest market supplier to Ireland and also represents a market that is fully familiar with the type of walking available in the West Coast area. Although this may suggest that the West Coast has strong competition from Britain, which is certainly true, we believe that the differentiating factors of being in Ireland; being peninsula-based; including island walking options; and having an outstanding landscape; combine sufficiently to allow the West Coast to compete effectively within this market place. These types of 'sales' messages will need to be supported through visible marketing and promotion campaigns.

Establish special events, festivals and sponsorship 'challenges' based upon walking

3.102 Special events, festivals and sponsorship 'challenges' should also be considered in terms of helping to raise the profile of each of the principle walks. Some of opportunities include Hungry Hill and Sugarloaf Mountain representing a 'Two-Peaks' Challenge and using the strength the Feast of St Finbarr on the 23rd September to organise an official 'pilgrimage'.

3.103 There are other options with the Drimoleague Walking Festival potentially representing a time when all of the key towns and villages could be co-ordinated to host locally-orientated familiarisation walks supported by the qualified Walking Guides. Other events that involve walking (such as wildlife watching days that coincide with specific wildlife events) would also act as a means of encouraging walking and an appreciation of the walking trails that the West Coast has to offer.

3.104 The value of events is that they can be used as a means of filling spare capacity and encouraging off-peak visits. In this respect, and given that walking can be enjoyed at any time of year and in any weather, any walking events should ideally be organised at a time when capacity needs to be filled to support local enterprises.

Improve pre and at-destination (and post visit) information provision for walking

3.105 There are two main types of information gathering; information gathered pre-travel, much of which merges with marketing and promotion; and at-destination information that is gathered during the trip from Tourist Information Centres, accommodation establishments, and potentially retail outlets. Importantly, this information should be presented as consistently as possible. Similarly, post-visit information should be used to remind visitors of the different assets that the area has to promote repeat visits.

Pre-visit Information

- 3.106 As the Stage A process highlighted, there are a number of different sources that advertise the walks available in the West Coast already, however the way in which they present the walks and the area, lacks clarity and co-ordination.
- 3.107 In the UK, the SWPCA identifies that clear and consistent messages regarding on the South West Coast Path has been vital in allowing walkers to understand how they can maximise the time they spend on the path regardless of whether it is used for one day, a short-break or a long-holiday. In this respect, the trail is supported by two dedicated websites (www.southwestcoastpath.com - Natural England as organisation with management responsibility for the National Trails; www.southwestcoastpath.org.uk - SWCPA) that both provide a good example of the types of website that could be created for the West Coast. In particular, the www.southwestcoastpath.com is a user-friendly site that has good descriptions of the trail segments (key facts, highlights, places of interest, shorter/longer options, public transport info, nearest car park, and Tourism Information Centres (TIC)) and includes a distance calculator between key places. A GPS file download is also available from this site, as is information on accommodation and luggage transfer services (www.luggagetransfers.co.uk). Importantly, the sites complement and reference each other.
- 3.108 A website for the West Coast, linked to and with direct access from westcorkaplaceapart.com, should be of a similar type, and include clear maps, written guides of each section and a guide to the accommodation that is available at the key Trail Access Points. This needs to be presented on a clean and easy navigable website containing downloadable information, suggested itineraries and packages and, potentially, online booking. It is recommended that this site replace the existing sites presented by Beara Tourism and Sheeps Head websites, although any trail branding for these peninsulas should be retained. More importantly, the site will need local input to ensure that there is a sense of authenticity and any recommendations come from 'locals who know...'.
- 3.109 This website needs to be accessible through a clear 'link' from the other official websites promoting tourism in this area, namely discoverireland.com, discoverireland.ie, irishtrails.ie and fuchsiabrands.com/westcorkaplaceapart.com to allow for more fluid transition from any 'market grabbing' headline information to 'deal sealing' detailed information regarding the West Coast. An associated 'App' (see below) should be used to complement the website and allow ease of transfer of pertinent information to mobile technologies.
- 3.110 The use of press publications to help promote the West Coast as a destination should also be encouraged. As identified previously, each of the principal walks has featured in some form of press publication or article within a dedicated walkers magazine. These are important and should continue to be encouraged, however reference to the walking opportunities across the 'West Coast' are needs to be emphasised even if the reporter is only using one of the trails. The same messages should also be used at national and international trade fairs.

At-destination Information Provision

- 3.111 As identified in Stage A, those seeking information on walking trails once at the destination are more likely to be holidaymakers searching for things to do whilst in the West Coast as opposed to being walking holidaymakers.
- 3.112 Nevertheless, information provision locally will still be important as a means of providing reinforcement messages, especially in terms of allowing visitors to distinguish between the walks that best suit their ability. It is also at this level that walking tourists are more likely to want information on the services to support their needs such as details of the key Trail Access Points, public transportation to the Trail Access Points, catering, baggage transfer, retail outlets and mapping.
- 3.113 Tourist Information Centres (official and local) and accommodation providers have a crucial part to play in this regard. The Bantry TIC, as the principal TIC for the West Coast, needs to showcase walking and the walking trails available in the area. Information is available on boards and via leaflets available from the stands and the TIC staff are also aware of the walking opportunities, especially Sheeps Head Way. However, the displays are quite basic and could be easily missed by casual browsers. It is recommended that new visuals and large-scale mapping be presented in the TIC along with key messages about the trails
- 3.114 The fact that the pathways are now depicted on the OS Discovery Series will certainly assist in terms of mapping provision, however the segments of the trails will also need to be presented. The existing walking guides are each useful in their own way, but they also each have their own idiosyncrasies:
- The Sheeps Head Way Guide contains a large map of the full walking trail but no segmentation. The hand-sized booklet contains description and nice supporting imagery, but no segmentation mapping. It is also difficult to distinguish between trail descriptions and interpretative information about the people and places from the area. The guide also needs to be purchased, costing €8.
 - The Beara Way Guide is a single booklet that contains both descriptions and mapping for the different segments and costs €10 to purchase. However, the mapping is actually placed at the back of the guide so users would need to continually flip pages to view the map and then read the description. Also, the segmentation in the guidebook is different to the segmentation provided on the Beara Tourism website.
 - The Drimoleague Heritage Walks contains a segment specific map and a full map at the back, but the linkage between the walks is difficult to comprehend with each section having their own unique 'name'.
- 3.115 A pocket guide is essential for the walking trails. In developing a future guidebook for each trail, particularly if they are to be sold, we would recommend combining the best elements of each if at all possible – i.e. the size of Sheeps Head/Beara Way, the good imagery of the Sheeps Head, a map with accompanying each segment as per the Drimoleague Heritage Guide, and a larger pull out map of the whole route as per Drimoleague Heritage Guide. The guides should be similar in terms of look and usability, although the trail branding, imagery and graphics can be unique to each trail.
- 3.116 The development of downloadable information and even 'Apps' using a GIS base would also be a useful addition to the information provision locally, especially with mobile

technologies becoming more commonplace. This is currently being utilised for walking in Kilkenny for example. It should be noted that, for walkers, these technologies will only be useful if mobile/3G coverage is good across all trail network with few weak spots. According to the consultation process, this is not currently the case along the principal routes, with some suggestion that coverage of standard mobile signals can be poor in some places.

3.117 It is recommended that this be examined in more detail to understand how technologies can be improved to aid the visitor use of technologies. If this can be achieved, the walking experience of the West Coast could be much more interactive with the technologies being used to:

- promote walking trails, Trail Access Points and the local transport services to support walkers, all at the touch of a button;
- guide walkers along the trails and ensure that they do not get lost;
- provide additional interpretive information on any natural and built heritage features;
- facilitate the ability for walkers to create their own personal walking 'blog' in which they can upload images, stories, cautions, and highlights; and
- aid trail management by inviting feedback on the trails, including a simple survey and ability to upload images of any barriers or obstacles that had to be overcome.

Post-visit Information

3.118 As mentioned previously, one of the advantages of walking as a market is that they can be encouraged to be repeat visitors, especially where long distance trails are available. However, there will still need to be some measure of enticement.

3.119 A good pocket guide, as identified above, will act as a souvenir that walkers can take home with them. A suggestion of the consultation process was that this booklet could be coupled with a stamp that could be entered into the book upon completion of the trail/section, again providing a further memento of the trail and potentially acting as a means of encouraging walkers to complete the route (i.e. collect all of the stamps). As with the UK's South West Coast Path, anyone completing the trails could be given some form of certificate upon completion. Allowing the names of those who have completed the trail to appear on an 'honours board' on the website could be used as a further enticement to return.

3.120 Walkers who have visited may also be interested in information on specific festivals, events and challenges as a means of offering something different.

Monitor walker use and satisfaction through visitor research to better understand, tailor and target the walking experience of the West Coast

3.121 The counters placed upon the trails are useful in approximating walking numbers. However, the numbers that they produce need to be supported by a more detailed understanding of the users. For instance, the counters have been used to estimate that there are currently 60,000 walkers using the Beara Way. However, at present, it is not possible to determine how many are local residents and how many are visitors. The business survey has been used to identify the visitors that can be classified as walking holidaymakers and those who are general holidaymakers using the walking routes during

their stay. However, this is the perception of the operator rather than being based upon quantifiable research.

- 3.122 It is for this reason that we recommend that periodic market research be undertaken to ask specific questions of the walkers themselves (i.e. where do they live, are they on a holiday or short break, how far are they planning to walk, did they chose the West Coast because of its walking trails, etc). This will help to provide greater understanding to the counts. It will also allow the WCDP and its partners to monitor changes over time such as in the volume walking holidaymakers, spend patterns and behaviours, accommodation preferences, and so on. This information can also be utilised to underpin the assumptions used in devising any future Economic Impact Assessment.

4 Setting the Context for Growth

Targeting Benefits from Walking Tourism

- 4.1 A principal focus of this study has been to identify the benefits of walking tourism and to ensure that they are being maximised to support the continuing welfare of the economy, environment and community of West Cork.
- 4.2 As part of the study process, URS-Scott Wilson has completed an Economic Impact Assessment of Walking Holidaymakers to the West Coast. The key findings of this are as follows:
- It is estimated that between 19,000 and 35,600 walking holidays are taken in the West Coast area per annum, with a further 89,000 to 90,500 walking day trips also taken in the area.
 - Walking holidays are roughly split 50:50 between domestic tourists and international tourist
 - It is assumed that the average spend for international visitors is €450 per trip³ and domestic visitors just under €200 per trip⁴. The average spend for walking day trips is estimated at €11 per trip⁵.
 - The direct economic impact from walking holidaymakers and walking day trips is estimated to be between €7.0 million and €12.3 million per annum.
 - The multiplier effects of this spend contribute a further €3.1 million and €5.4 million per annum.
 - The combined economic impact of between €10.1 million and €17.7 million from walking holidays and day trips creates/safeguards 256 to 449 Full Time Equivalent (FTE) jobs per annum, with the likely scenario being a value of €13.9 million supporting 353 FTEs per annum.
- 4.3 This economic impact more than off-sets the cost of maintaining the walking trails through the Walks Scheme, with the Beara Way and the Sheeps Head Way costing approximately €500,000 per annum through these maintenance payments.
- 4.4 However, in order to justify the measures outlined above, and especially the cost in maintaining the walking trails themselves, it is also important to recognise the West Coast (and indeed West Cork as a whole) has not reached its potential in terms of walking holidaymakers. In fact, there is still a significant amount of scope for encouraging new walking holidaymakers to the area.
- 4.5 The foundations are certainly in place, but the purpose behind each of the actions highlighted in Section 3 is to demonstrate that, through concerted effort of all stakeholders, the experience of walking tourism in the West Coast could certainly be improved; and that this in turn will have benefits for the welfare and the economy and the community.

³ Fáilte Ireland suggests €587 for Walking Holiday Makers to Ireland. Whereas, the average spend of overseas holiday makers to South West Ireland is €312.68. €450 is the median value between the two.

⁴ Based on average spend per holiday trip for domestic

⁵ Based on Wales research and other benchmarks

4.6 In order to entrench this premise in terms of additional benefits from walking tourism, we believe that the actions identified should be targeting the following impacts by 2016:

- Dedicated marketing and promotion focussed on walking tourism that identifies itineraries and allows easy packaging of travel, accommodation and baggage transfers should have a significant impact on supporting existing operators. International markets and domestic markets are to be targeted. We suggest that, as a target, an uplift of 2.5 percentage points in existing accommodation occupancy (representing a lift of 50% over current levels) should be sought through dedicated walking holidaymakers.
- A corresponding 5 percentage point uplift in walker day trips from the local catchment and other holidaymakers in the West Coast should also be targeted.
- The availability of walking guides will help to support different walker types and abilities, especially beginners and those seeking greater interpretation of the West Coast's natural and built heritage. It is suggested that, as a target, each walking guide should undertake around 50-guided walks per annum, although this may need to be monitored and revised.
- New walker friendly accommodation at each of these strategic sites identified in Section 3, with an average capacity per site of 25 bedspaces, will allow for greater participation in point-to-point walking. These bedspaces should ideally command a minimum of 50% occupancy, of which 65% should be dedicated walkers.
- Improved supporting services that cater for and target walkers in terms of food, refreshments, transport, and retail should increase walker spend. We recommend that a target should be to increase walker spend by 15%

4.7 By transposing these targets onto the current economic impact of walking tourism in the West Coast, it can be estimated that these targets could have the following impacts:

Scenario	Low	Medium	High
No. of Walkers			
Overnight walkers using existing accommodation:	24,601	33,902	43,203
<i>Domestic</i>	12,792	17,629	22,466
<i>International</i>	11,808	16,273	20,737
Overnight walkers using new/dedicated walker accommodation:	4,063	4,063	4,063
<i>Domestic</i>	2,113	2,113	2,113
<i>International</i>	1,950	1,950	1,950
Tourist day walkers (over 3hrs), of which	92,854	92,072	91,291
Total economically active walkers	121,517	130,037	138,557

Scenario	Low	Medium	High
Gross Expenditure			
Overnight - domestic	€3.4m	€4.5m	€5.6m
Overnight - international	€7.1m	€9.4m	€11.7m
Day tourist (over 3hrs)	€1.2m	€1.2m	€1.2m
Total expenditure (gross)	€11.7m	€15.1m	€18.5m
Net Expenditure			
Leakage	10%	10%	10%
Gross expenditure minus leakage	€10.6m	€13.6m	€16.6m
Composite multiplier (induced and indirect)	1.6	1.6	1.6
Net expenditure (Economic Impact)	€17.0 m	€21.8m	€26.6m
Employment			
Direct	295	381	467
Indirect and induced	130	168	206
Total employment	425	549	673
Forecast Change from 2011-2016			
Gross Expenditure	+€4.7m	+€5.4m	+€6.2m
Net Expenditure	+€6.9m	+€7.9m	+€8.9m
Employment Contribution	+169	+196	+224

- 4.8 Under the targets as identified above, the net impact of walking tourism in the West Coast would be recorded at between €16.8 and €26.6 million in visitor spend per annum, with the likely (medium) scenario generating €21.7 million per annum. In other words, by continuing the walking trails in the West Coast, tailoring services around them, building some modest new capacity, and ensuring that the area is marketed sufficiently, it can be estimated that the value of walking tourism could increase by nearly €8 million per annum in net expenditure by 2016 in the West Coast alone. This in turn would support and create new jobs for nearly 200 additional FTE positions.

Securing Walking Trails in Ireland

- 4.9 These benefits will only be realised if the future of the walking trails can be secured. As highlighted in Stage A, this is a critical issue facing the longevity of walking tourism, not just in West Cork but across all of Ireland.
- 4.10 The Walks Scheme has achieved a significant increase in the availability of publically accessible pathways that can now be utilised for walking tourism across Ireland. The ability to walk the Beara Way and the Sheeps Head Way and associated Looped Walks is reliant upon the co-operation of landowners, with the incentive of the payments available through the Walks Scheme regarded as the principal means for negotiating access. However, the scheme is now closed to new entrants and the existing payments are, in most cases, only guaranteed up until around 2013 and 2014.
- 4.11 A fundamental message taken from each of the meetings that have taken place with local representatives, from operators and landowners through to local businesses, is that the walking trails will only be available in the future if the payment to landowners continues. If

- not, there is an overwhelming sense that the walks could be significantly affected by landowners removing access permissions across their land.
- 4.12 It is important to understand that maintaining and improving any walk or trail has continuing resource and management implications regardless of the mechanism used to deliver the trails. For example, the annual cost of maintaining the South West Coast Path in England is approximately £560,000 (€645,000) per annum, which equates to around £552 (€635) per kilometre. This cost is met by Natural England as managers of the National Trails, in association with the highways agency of each local authority and The National Trust who both assist in maintaining and improving the pathways to a high standard. In addition, the SWCPA as a charitable organisation uses any proceeds from membership, sales and marketing to assist in raising funds for key projects. These agencies effectively pool their resources to ensure that the overall benefits of walking tourism along the length of the trail will continue.
- 4.13 In Ireland, the Walks Scheme has meant that, in practical terms, a series of permissive rights of access has been secured with the co-operation of landowners. However, it needs to be recognised that the scheme has actually delivered much more than this in real terms. As identified above, the walks in the West Coast generate an estimated €13.9 million per annum through visitor spend. However, this calculation does not include the social benefits that have arisen. The landowners that have been consulted are very proud of their involvement in the walking trails and they also feel a strong sense of ownership about the future of the trails. They also regard themselves as having a key role to play ‘looking after’ the walkers, particularly those who lose their way and need directions; miss-judge the length of time the walk takes and require a means of contacting either their B&B or taxi (hackney) to pick them up; and even sometimes as a toilet stop en route. Most landowners are happy to do this as they regard themselves as not only facilitators but also ambassadors, managers and advisors on walking in the area.
- 4.14 The Walks Scheme has also created entrepreneurial spirit amongst some landowners whom are now seeking to diversify their operations, with one landowner in Drimoleague, for example, having established plans to create a walkers-orientated accommodation and guiding enterprise. Other landowners have also demonstrated interest in establishing some form of walking/accommodation business during the consultation process.
- 4.15 Although incidents of littering, open gates, and even illegal camping are not uncommon, the landowner does not see the payment as means of recompense for any inconvenience caused. Rather, they regard it as payment to both complete annual maintenance and as recognition of the co-operation and valued contribution they make in ensuring the walks continue in the long-term. In this respect, and to reiterate the sentiment of the Stage A report, the removal of the payment through the Walks Scheme would not only potentially damage the continuity of the walks themselves, but also the added value that landowners provide in supporting walkers on the ground.
- 4.16 Any resulting loss of access permission by landowners, whether it is a 5% loss or 95% loss (with the local community groups fearing that the latter will more likely be the case), would severely compromise the walking experience along these trails. This in turn would severely compromise walking as a viable tourism theme in the West Coast, and indeed Ireland as a whole. It may be possible to retain some of the smaller National Looped Walks and those trails that involve either one or just a few landowners through altruism. However, the prospect of securing the future of any long distance trails that involve many tens or

indeed hundreds of landowners would be virtually impossible. It would also remove the sense of pride, ownership, and entrepreneurial endeavour, with few landowners (and indeed any other businesses) likely to invest in supporting services for walkers if there is a sense that the most important component, the walks, are soon to be lost. Even if most of the pathway can be retained, the trails will still need maintenance that will ultimately be need to be derived from a national (as per the National Trails in England) or regional agency. Moreover, under this scenario there is a danger that many of the other benefits as outlined will still be lost as landowners will lose a sense of ownership of the trail itself.

- 4.17 A national resolution needs to be found if the long term future of the existing trails is to be secured, a position that all stakeholders are acutely aware. Local landowners would obviously welcome a continuation of the current conditions of the walks scheme; however the national agencies indicate that this might not be possible due to the current economic position of Ireland and the European Union. As a national concern, it is beyond the scope of this study to examine how this could be resolved to the satisfaction of all stakeholders. What is apparent through the discussions with the landowners is that the immediate future of the Walks Scheme represents the biggest single threat to developing a successful walking tourism offer in Ireland, let alone West Cork. This in turn would have significant implications in presenting Ireland as a destination for outdoor activities, with walking the most popular activity from which the viability of other activities can be explored.
- 4.18 For the West Coast, the threat is the immediate loss of around €13.9 million per annum from the local economy from dedicated walkers. It also means that the prospect of gaining further benefits from walking tourism (around €8 million) will not be realised. Fundamentally, the loss of walking trails would significantly impact upon the overall appeal of visiting and exploring the West Coast as one of Ireland's landscapes of outstanding natural character.

Walking and Other Activities

- 4.19 The focus of this study has been on walking as an activity and theme that can be used to attract visitors to West Cork's West Coast. However, as a landscape of outstanding natural character, there are a series of other activities can be supported in the West Coast. The following represent some of the more popular choices that are recognised as being key tourism themes in their own right:
- Cycling – there are corresponding cycling trails for both the Beara Way and the Sheeps Head Way. Cycling represents an alternative mode of exploration compared with walking and can be undertaken as a day trip or indeed overnight tours (www.irishcyclehire.com). The availability of bike hire is essential for this theme. A cursory overview indicates that bike hire is available in Bantry (Nigel's Bicycle Shop) and Kenmare (Finnegan's Bicycle Hire). Whether this is sufficient to support existing demand and future growth in this theme is unclear and would need further testing. However, as with walking, the landscape character of the West Coast is certainly conducive to this type of activity.
 - Horse riding – horse riding represents another activity theme that has a clearly defined and international market. Within the West Coast, Dunbeacon Equestrian Centre is the only AIRE registered Equestrian Centre that offers trail rides/hacks, though there is a greater concentration of centres closer to Cork City, Kinsale and Marlow. Horse riding tends to be a niche interest, although the activity can present a unique activity that

people try for the first time whilst on vacation. Whether the West Coast is suitable for this activity will be dependent on the quality of the trails that are available/could be created.

- Watersports – the coastal setting of the West Coast is certainly conducive to a variety of watersports. This is currently being supported by West Cork Sailing and Powerboating (Adrigole) and Atlantic Sea Kayaking (Skibbereen – base). A new activity centre is also being actively pursued at Kilcrohane on the Sheeps Head Peninsula. It is certainly conceivable that watersports could play a much greater role in the tourism offer of the West Coast, both as a key motivating theme and as a supporting activity that forms part of a wider package. A kayaking tour of the peninsulas could, for example provide a stimulating and rewarding experience for this activity niche.
- Sailing/yachting – partly in support of the watersports theme, and partly to reflect that yachting has its own tourism market, the West Coast could also play a critical role in supporting a sailing/yachting product. Cobh and Kinsale has a series of marinas (6 according to www.portbooker.com), yet the remaining West Cork coastline has only one outside of Kinsale, the Lawrence Cove Marina, Bere Island (40-berths). Although sailors can rely on a series of sheltered bays to moor in, the added value of a marina with touring berths can be considerable in relation to security, services and providing access to other local amenities. A further marina, or series of marinas, along the West Coast, especially around Bantry and Glengarriff, would therefore appear a sensible strategic development to investigate further.
- Wildlife watching – wildlife watching is an activity that is growing in popularity as a leisure pursuit. It is also a pursuit that has a direct synergy with driving holidays to specific destinations. This is clearly the case for safaris, but it can be equally applicable to bird watching and observing small but geographically restricted or rare species such as otter, red squirrel, puffin and bittern for example. The consultation process has highlighted that dolphins, basking sharks, whales, puffins and chuffs are some of the more unusual and uncommon species that can be viewed from the coastline of the peninsulas. Each of these species could be used to attract wildlife enthusiasts to the West Coast.
- Coastal Angling and Sea Fishing – fishing is already a popular pursuit for the West Coast with sea fishing trips available from Castletownbere for example. Again, the market for angling is significant at an international level and many destinations are seeking to drive awareness and improve the experience of angling in order to maximise this potential. West Cork, including the West Coast, should seek to position itself much more as an angling destination within this context.
- Other niche interests – the landscape character of the West Coast lends itself to a number of other niche interests, including:
 - Coasteering - encompasses movement along the intertidal zone of a rocky coastline on foot or by swimming.
 - Geotourism – providing teaching and learning on how to understand and appreciate the natural landscapes and geological phenomena continuing to impact on the coastal zone.
 - Geocaching - an outdoor sporting activity in which the participants use a Global Positioning System (GPS) receiver, mobile device and other navigational techniques to hide and seek containers, called "geocaches" or "caches". This

activity can be a useful means of encouraging access to the countryside by families with children.

- 4.20 The majority of these interests are complementary to walking, though this can be dependent upon some segregation of activities to avoid potential conflicts. For instance, cyclists can represent a perceived danger to walkers along narrow pathways or where they appear in significant volume. Similarly, walkers with dogs that are off-leash can present a hazard for horse riders, again where pathways are shared. Nevertheless, these types of issue can usually be overcome through appropriate management measures.
- 4.21 The value of developing other activities alongside walking is to gain critical mass that will place the West Coast as a hub for outdoor activities as a whole and not just for walking. This issue was raised during the consultation process, with both the local community and operators keen to ensure that the overall potential of the landscape is exploited to ensure maximum tourism potential. However, within these activities and themes, it needs to be recognised that walking represents the greatest market volume.

5 Overall Conclusion

- 5.1 West Cork's West Coast has the attributes required to be presented as an important walking tourism (and outdoor activities hub) to support both domestic and overseas visitors. The foundations, principally the three long distance walking trails, National Looped Trails and other local walks, have already been laid largely driven from a community base and with the support of different national and regional agencies. This in turn is delivering somewhere around €13.9 million per annum to the local economy at present.
- 5.2 However, and in comparison with other landscapes of outstanding natural character nationally and internationally, the West Coast at present does not feature as strongly in terms of outdoor activities, including walking. Image, awareness and profile are critical to this end. Hence a key conclusion and recommendation is to establish a clear identity, image and supporting messages that will allow enthusiasts to simply and quickly understand how the facilities and services of the West Coast can be tailored to meet their needs as a walker; regardless of whether they are beginners, general wanderers or enthusiasts.
- 5.3 The purpose of each of the recommendations as highlighted above is to ensure that this is being achieved for walking (see Figure's 5.1, 5.2, 5.3 and 5.4 for a graphic illustration). The following visioning statements aim to better articulate the collective experience that each of the measures as highlighted will provide a potential walking holidaymaker to the West Coast West Cork. By targeting the product and marketing towards their specific behaviours and needs, it is possible to envisage the following:
- Walking enthusiasts will be invited to explore the rugged coast and dramatic highlands of West Cork's West Coast through a series of walks that circumnavigate and traverse the Beara and Sheeps Head Peninsula's, or to walk in the footsteps of St Finbarr, with the prospect of discovering some of the best of the natural, built and cultural heritage of West Cork (and indeed Ireland) the principal reward.
 - An easy to use website will allow walkers to easily define the trails that meet their ability and interest pre-visit, with an easy to use guide highlighting the type, character, challenges and distances of walking trails available and more specific rewards (e.g. panoramic views, discovering natural and built heritage, visiting traditional pubs, 'following in the footsteps of....') that each offers. The website and walks will also be available as a downloadable 'App' for use on portable multi-media devices.
 - Through this website, walking holidaymakers will also be able to package their holiday to suit their needs. In particular, point-to-point walkers will be given suggested itineraries, timings, accommodation, catering and baggage transfer options. Single site walking holidaymakers will be able to choose from a series of Walkers Welcome towns and villages, each presented in a way that highlights their key characteristics/advantages.
 - Once at their chosen trail, the experience of the walkers will be enhanced by the range of different services that are each catering to their needs as part of a co-ordinated Walkers Welcome package. For instance:
 - accommodation operators will all provide maps, drying amenities, packed lunch service, baggage transfer, and even people transfers if needed;



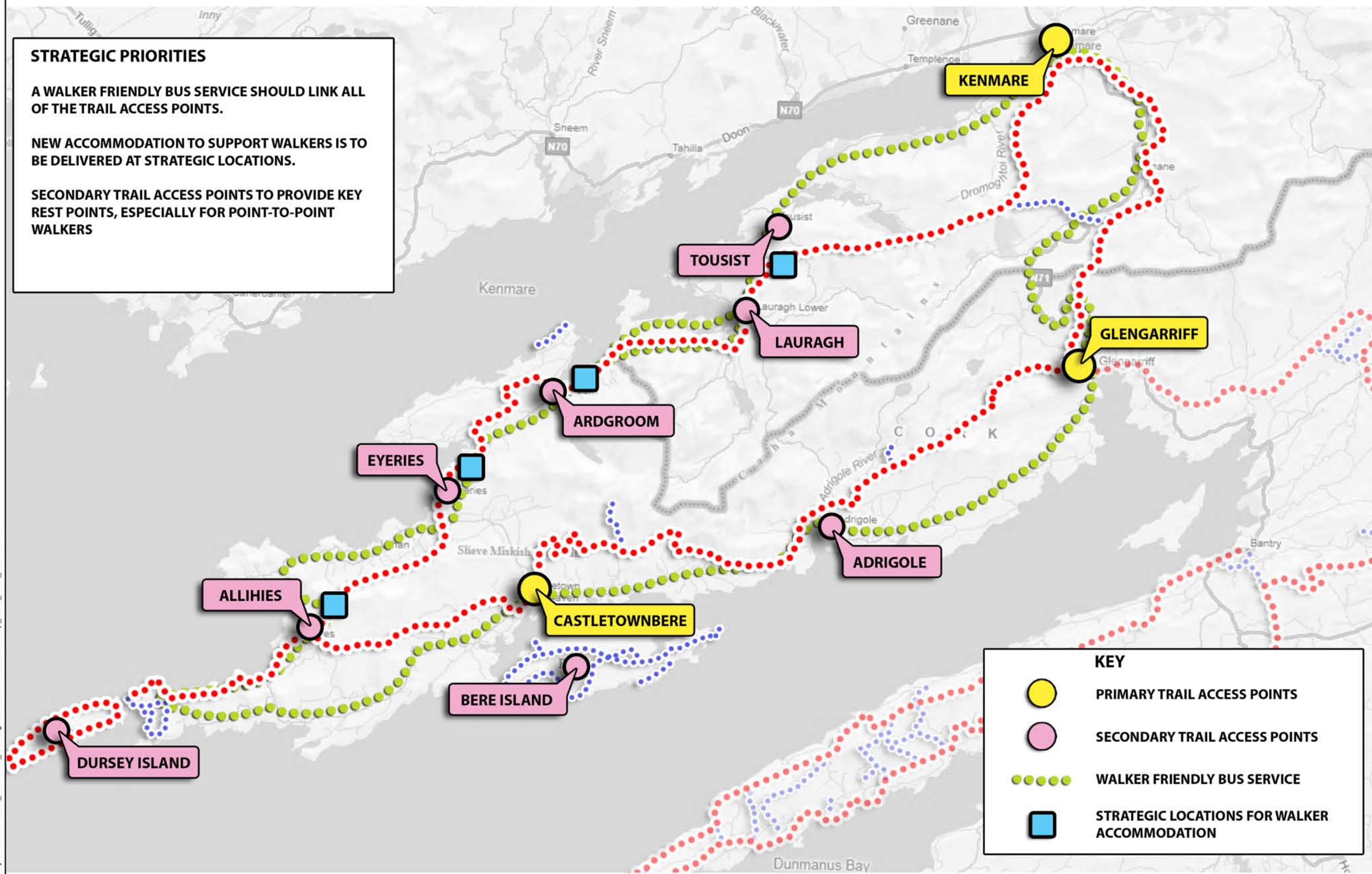
FIGURE 5.1

STRATEGIC PRIORITIES

A WALKER FRIENDLY BUS SERVICE SHOULD LINK ALL OF THE TRAIL ACCESS POINTS.

NEW ACCOMMODATION TO SUPPORT WALKERS IS TO BE DELIVERED AT STRATEGIC LOCATIONS.

SECONDARY TRAIL ACCESS POINTS TO PROVIDE KEY REST POINTS, ESPECIALLY FOR POINT-TO-POINT WALKERS



KEY



PRIMARY TRAIL ACCESS POINTS



SECONDARY TRAIL ACCESS POINTS



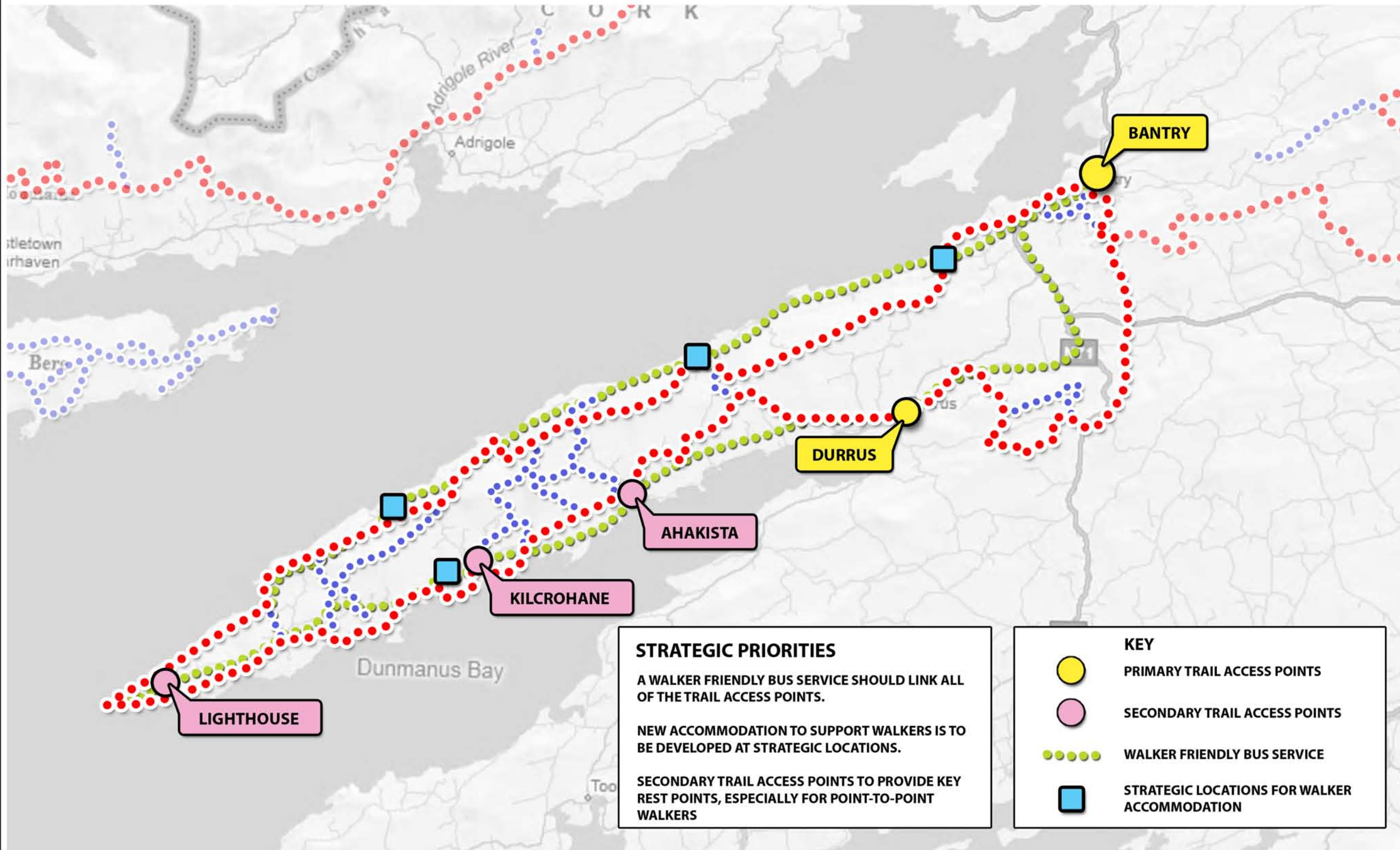
WALKER FRIENDLY BUS SERVICE



STRATEGIC LOCATIONS FOR WALKER ACCOMMODATION

NOTES			
Revision Details			
By	Check	Date	Suffix
Drawing Status			
DRAFT			
Job Title			
WEST CORK WALKING TOURISM			
Drawing Title			
BUILDING WALKING CAPACITY ON THE BEARA WAY			
Scale at A3			
Drawn	AT	Approved	BW
Stage 1 check	Stage 2 check	Originated	Date
			01.12.11
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FIGURE 5.2			





NOTES

Revision Details	By	Date	Suffix
Drawing Status	DRAFT		
Job Title	WEST CORK WALKING TOURISM		
Drawing Title	BUILDING WALKING CAPACITY ON THE SHEEPS HEAD WAY		
Scale at A3			
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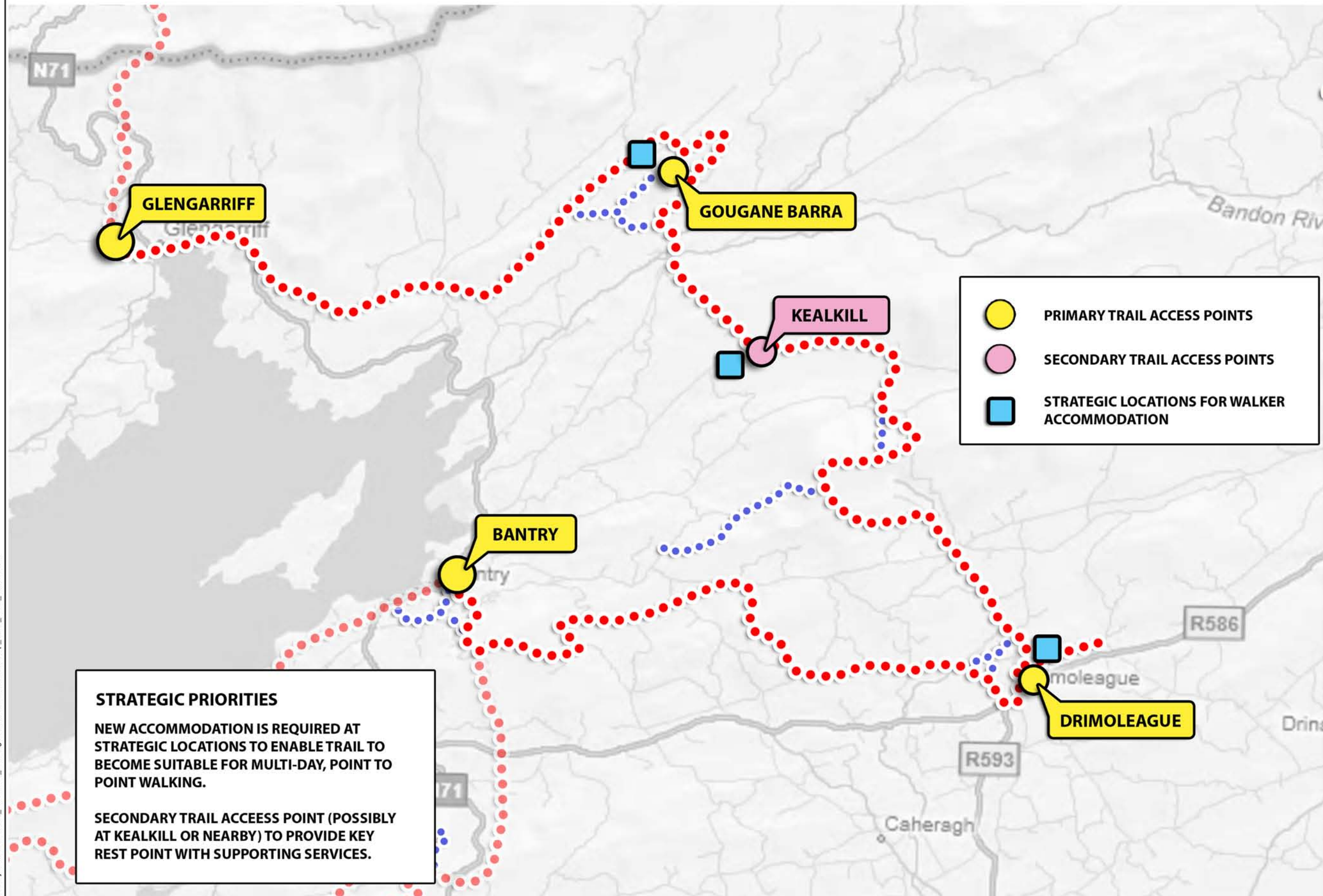
Drawing Number

Rev

FIGURE 5.3

Date: 22nd November 2011
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Date: 22nd November 2011
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NOTES

Revision Details		By	Check	Date	Suffix
Drawing Status		DRAFT			
Job Title		WEST CORK WALKING TOURISM			
Drawing Title		BUILDING WALKING CAPACITY ON THE PILGRIMS WAY			
Scale at A3					
Drawn AT		Approved BW			
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FIGURE 5.4

- Tourism Information Centres will carry walking maps, preferably Ordnance Survey or OS-based maps accompanied by guide books, leaflets and downloads on the routes (as appropriate) highlighting features of interest;
 - catering providers will provide basic refreshments and toilet stops for walkers en route, but will also encourage repeat visits through incentives;
 - local residents will actively support and engage with walkers, particularly if they lose their way, find themselves stranded, or require any other form of aid; and
 - retail establishments will carry equipment that meets the needs of walkers such as outdoor clothing, walking poles, rucksacks, gaiters, footwear and even GPS systems.
- To access the walk, walkers will be directed to one of a series of Trail Access Points, with each being associated with one of the main towns and villages of the area. Here, walkers will find the different amenities that they require, such as a place to park their car, a trail board carrying pertinent information, refreshments, toilets, and public transport information.
 - Walkers based at, or accessing a walk from a Trail Access Point will be able to use a co-ordinated bus service that has a series of additional stops (at the other Trail Access Points) along the principal trails to allow them to start and stop their walk at points to suit their needs. The preference will be for walkers to be transported out to an appropriate end point of the walk so that walkers can walk back. This way they will not have to worry about getting the timing exactly right to ensure that they catch the bus later in the day. Bus timetables will be clearly displayed on the trail board and at other strategic locations within the Trail Access Point/Trail Board.
 - For those seeking assistance in navigation, company, or simply in getting a greater understanding of the scenic, heritage, and cultural characteristics of the walks, walking guides will be on-hand. Having been trained to Walking Group Leader standard, these guides will lead small groups safely across the trails, providing added interpretation that go beyond the guidebooks helping the visitor to understand the other sightseeing opportunities of the area.
 - Point-to-point walkers will be supported through walker-friendly accommodation at strategic locations. Accommodation will range from the comfort of B&B's, guesthouses and hotels to the more budget conscious hostels and 'Pods'. For those who have their own bivouacs and other forms of tent, camping facilities will also be available close to hostels, whilst some farmers/landowners will also be able to support camping upon request. For each section of a long distance trail completed, point-to-point walkers will receive a confirmation stamp in their guidebook.
 - At the end of their day, walkers will be able to enjoy the traditional hospitality reserved for all visitors to the West Coast. Sampling locally caught seafood, locally reared meats, locally produced cheeses, traditional Irish Ales, Stouts and Porters and other local produce will add to authenticity of the West Coast experience. The prospect of joining in with a traditional céilí or witnessing a traditional Irish music performance will also heighten the cultural experience of walkers.
 - Messages of 'Leave no Trace' will be reinforced throughout the visitor's stay in the West Coast, with the maintenance and management of the area's outstanding natural character being of paramount importance. To this end, visitors will be requested to contribute to conservation in practice by ensuring that their behaviours do not damage

the natural character and perhaps even to contribute to conservation projects through donations or, in the future, returning to volunteer in various conservation projects.

- After their trip, walkers will be encouraged to return, to discover other parts of the coast through other walks, competing in challenge events such as the annual 'Two Peaks Challenge' for charity, or to complete sections of the trail that they were unable to achieve on this visit. The prospect of receiving a commemorative certificate to demonstrate the full completion of the walk will act as a motivator to this end, with their names also presented upon the website's 'Conquerors of the West Coast Walks' page.

- 5.4 The above is presented to demonstrate the potential function of the recommendations in this report. It is accepted that this will require a great deal of co-ordination and co-operation in relation to the key partners and stakeholders if this is to become a reality. However, the benefits of driving this type of approach would be palpable, for the visitor, for the economy, for the environment and, by inference, for the future welfare of the local community.

Economic Deliverables

- 5.5 A key deliverable in relation to this study is to identify mechanisms through which walking tourism can support and benefit the local economy. The following represent the key areas in which this is to be achieved:

- Inter-regional transport services directly supporting the walking market to the West Coast, with the principal gateways being Cork International Airport, Cork Ferry Port, and Killarney National Park.
- Local transport service orientated to walkers on the Beara Peninsula and the Sheep's Head Peninsula, with each of the Trail Access Points being a stop on the route.
- The updating of existing accommodation to become more 'walker friendly' by signing up to Fáilte Ireland's Walkers Welcome Initiative and providing additional services to meet their needs.
- A series of new walker-orientated accommodation in the form of bunkhouses, camp sites, and 'Pods' at strategic locations.
- Integration of retail, catering and attraction enterprises at each of the Trail Access Points and along the trails into the walking experience through Fáilte Ireland's community 'Walkers Welcome' initiative, with training and trail familiarisation likely to be required.
- Bag carriage service, with the prospect that this could be undertaken by one dedicated service provider.
- Walking Guides, with the prospect that new guides will be required periodically to replace any existing guides whose life circumstances change.
- Dedicated outdoor adventure retailing either supporting existing enterprises, encouraging a new venture or bringing in established high street brands such as The Outdoor Adventure Store which has an outlet in Cork.

- 5.6 A key function of the WCDP and its partners will be in providing an economic environment within which these benefits can be realised. In some instances, this may be through direct intervention such as supporting improvements to existing accommodation, developments

in new accommodation projects, the bag carriage service, or potentially encouraging local transport services. For others, such as retail and catering, the main intervention will be in helping enterprises to recognise walkers as an opportunity and in ensuring, through marketing and other activities, that the walking market is a visible presence within the key towns in particular.

6 Management and Implementation

Management

- 6.1 Tourism is by its very nature a complex sector to manage. Different businesses, national/regional agencies, community groups, environmental groups and even the visitors themselves all represent stakeholders with a vested interest in the future welfare of a destination such as being presented by West Cork's West Coast. Moreover, the different stakeholders have their own views on how the destination should develop.
- 6.2 Throughout the investigation process, we have sought to consult with representatives from each of the stakeholder groups. We have also undertaken a series of workshops as a means of sharing ideas, views and opinions. From these discussions, it is clear that there is a need for a more co-ordinated and co-operative approach to managing tourism along the West Coast, not just for walking but for all elements of tourism. This is reflected in our recommendations to focus on the West Coast as a 'destination' in its own right.
- 6.3 The fact that the communities have had strong leadership through the respective Local Community Tourism Groups (i.e. Beara Tourism, Sheeps Head Community Group, Drimoleague Heritage Walkways Committee) in terms of delivering tourism and the walking trails is certainly a positive for the area, and their involvement in relation to their specific areas and trails needs to be retained. However, it is clear that these organisations would benefit from greater co-ordination between themselves and greater strategic support from the key agencies.
- 6.4 It has been highlighted throughout the consultation process that the Local Community Tourism Groups have utilised the resources of each of the different agencies in the past. However, there appears to be confusion over the roles, responsibilities and resources that each organisation has in terms of supporting the walking trails; and a perceived difference in approach to the allocation of resources vital to the maintenance and promotion of the trails.
- 6.5 The implementation plan as outlined below aims to redress this by allocating roles for the different agencies and other stakeholders by the key recommendations. In addition to this, we recommend that a Walking Tourism Forum (or indeed Tourism Forum with a sub-committee for walking tourism) be established that directly engages the different stakeholders. The composition of the forum would typically involve representatives of the following:
- West Cork Development Partnership (WCDP)
 - Fáilte Ireland (FI)
 - Tourism Ireland (TI)
 - National Trail Office (NTO)
 - Department of the Environment, Community and Local Government (DECLG)
 - Forestry Service (FS)
 - National Parks and Wildlife Service (NPWS)
 - Cork County Council (CCC)

- Kerry County Council (KCC)
 - South Kerry Development Partnership (SKDP)
 - Comhar na nOileán Teoranta (CT)
 - Local Community Tourism Groups (i.e. Beara Tourism, Sheeps Head Community Group, Drimoleague Heritage Walkways Committee – LCT)
 - Rural Recreation Officer (RRO)
 - West Cork Rural Transport Service (WCTS)
 - Local businesses (LB)
 - Official Walking Guides (WG)
 - Accommodation Operators (AO)
 - Coillte (CO)
- 6.6 The list is by no means exhaustive and there may be a requirement to include other agencies and representatives either on a permanent or ad hoc basis to provide advice and support as required. This forum should be used as a means of addressing the recommendations, disseminating actions to the specific stakeholders, and in identifying and allocating resources as appropriate. In this respect, it should also be possible for the different agencies to identify opportunities for pooling resources where appropriate – particularly in relation to trail management and maintenance. It would also be useful to use this forum to discuss cross-boundary planning matters that could have implications for the wider environment of the West Coast.
- 6.7 The full forum may only need to meet a couple of times per annum, though a working sub-group could be formed to ensure that the key actions identified from these meetings are progressed. This group would, at a basic level, need to include a representative from the WCDP, Fáilte Ireland and each of the Local Community Tourism Groups.

Implementation Plan

- 6.8 The following Implementation Plan is the key output that highlights how the recommendations are to be realised by:
- setting out a co-ordinated work programme for the next five years;
 - identifying the priorities and timetable for action within that period;
 - identifying the agencies that will be involved in implementing specific actions, whether in a lead or supporting role; and
 - providing an indication of the personnel, revenue and capital resources required to enable its delivery.
- 6.9 Altogether, the implementation plan aims to provide a coherent delivery mechanism that demonstrates how key actions are to be delivered and the interrelationships between them.
- 6.10 The wide range of tasks identified in this Implementation Plan raise the fundamental issue over the availability of the resources needed to see them come to fruition. Some actions

will involve the commitment of existing manpower, or the continuation of existing financial support; but others require the allocation of additional resources and capital funding. As an initial guide to the resource implications of development, we have included an approximation of the resource implications for each of the actions:

- Personnel involvement:
 - * = Irregular discussions/meetings between partners;
 - ** = regular discussions/meetings/monitoring;
 - *** = specific time-lined involvement/support for projects
- Revenue Costs (mainly for studies, further investigations, training, and marketing):
 - @ = €5,000 or less;
 - @@ = €5,001 - €25,000;
 - @@@ = €25,001+
- Capital Costs:
 - € = Under €50,000;
 - €€ = €50,001 - €150,000;
 - €€€ = €150,001+

6.11 The nature of the new vision for walking tourism in West Cork's West Coast means that specific tasks that are to be undertaken will have further ramifications in relation to delivery. This is represented as cross-hatching within the timeline for tasks.

West Cork Development Partnership

Maximising the Benefits of Walking Tourism – Stage B Report: Recommendations and Conclusions

No.	Task	Critical Path/ Associations	Timeline			Lead Role	Other Partners	Comments	Resource Implications		
			Yr1	Tr2-3	Yr4-5				Personnel	Revenue	Capital
WCW1	Use the outstanding natural landscape as the principal image for the West Coast, inviting visitors to explore by walking (and other activities)	Underpins area strategy and all the following actions				WCDP	FI, TI, CCC, KCC, SKDP, COT, LCTG	Acknowledging the outstanding natural character of the West Coast is fundamental in recognising how visitors can be enticed to the area. This action will therefore underpin all future programmes concerning the West Coast	***		
WCW2	Ensure that the quality of the natural environment is retained and conserved through planning and other strategic policy documents	Underpins area strategy and all the following actions				CCC, KCC, WCDP, SKDP, COT	DECLG, FI	By establishing shared parameters for managing and improving this shared resource through clearly defined policy, it will be possible to ensure that whole landscape can be protected for future generations.	**		
WCW3	Establish design parameters to ensure that any associated furniture for the walking trails is sympathetic to the landscape	WCW2, WCW7				WCDP, CCC	NTO, FI, LCTG	This is vital to ensuring that the trail itself does not detract from the character of the overall environment. This should accompany the creation of shared planning and strategic policy on conservation and management of the area as a whole. Might be necessary to use a Landscape Architect to help shape the design guidance	**	@@	
WCW4	Integrate the 'Leave no Trace' philosophy into walking trails at all stages	WCW5, WCW6, WCW8, WCW11				WCDP, Outdoor Ethics Programme	NTO, FI, TI, LCTG	It needs to be remembered that tourists have negative as well as positive impacts. The 'Leave no Trace' philosophy aims to counter these impacts at a local level. Therefore, this philosophy needs to be emphasised throughout – i.e. marketing, trail boards, guide books, etc.	*		

West Cork Development Partnership

Maximising the Benefits of Walking Tourism – Stage B Report: Recommendations and Conclusions

WCW5	Engage Communities in Failte Ireland's 'Walkers Welcome' Initiative, especially at the identified Trail Heads	WCW6				FI, WCDP	NTO, TI, LCTG	The continuing effort of the communities needs to be rewarded through the Failte Ireland 'Walkers Welcome' scheme. This scheme is designed to actively engage all elements of the community in delivering positive experiences for walkers – from the landowners, to the accommodation providers, to local retail and catering establishments, to local households residing close to the walk. Some capital works might be needed to support walkers – e.g. toilets, changing/drying rooms, etc	**		€€
WCW6	Establish the key towns and villages as the trail access points	WCW5, WCW12				WCDP, FI	SKDP, COT, LCTG	Establishing the key towns and villages as Trail Access Points will ensure that walkers have access to amenities that cater for their needs at the beginning, during and at end of their journey. It will also ensure that local businesses can benefit from walkers more directly. Sympathetically designed Trail Boards will be required.	**		€
WCW7	Develop a management plan for the principal walking trails to identify the measures and resources required to fulfil the National Trail Office 'Management Standards'	WCW3, WCW4, WCW8				NTO, RDO, LCTG	DECLG, WCDP, SKDP, COT, RSS	A management plan for each of the trails is required, supported by appropriate capital funding, possibly using the RSS further to deliver identified tasks.	***	@@@	€€€
WCW8	Improve the Segmentation of the Long Distance Trails	WCW9, WCW10, WCW12, WCW13, WCW18, WCW20, WCW21				RDO, LCTGs	NTO, WCDP, SKDP, COT, FI, TI	Segmented trails allow walkers to easily plan their route to their time limits. Each segment should cover a minimum of three-hours and a maximum of 10-hours walking time (6km – 20km allowing for ascents) with the average being around six-seven hours (12-14km).	***	@@	

West Cork Development Partnership

Maximising the Benefits of Walking Tourism – Stage B Report: Recommendations and Conclusions

WCW9	Develop the challenges/themes associated with other (looped) walks	WCW8, WCW19				RDO, LCTGs	NTO, WCDP, SKDP, COT, FI, TI	The focus here is to make more of the natural heritage components that walkers could encounter on their walk; and to create distinct 'challenges' that can be utilised for events and charity walks, etc – for e.g. 'the West Cork Two Peaks Challenge'.	***	@@	
WCW10	Raise Awareness of 'Walking Guides'	WCW8, WCW18				WCDP, RDO, LCTGs	NTO, SKDP, COT, FI, TI	The trained Walking Guides will have a vital role in supporting organised tour operators; assisting smaller groups; providing companionship; and providing greater interpretation. The skills of the walking guides should also be utilised to lead local 'familiarisation trips' amongst local business, landowners and TIC staff.	**		
WCW11	Encourage 'walker friendly' transport connections from international gateways	WCW18				WCDP	National/Local Transport Operators	The timing and frequency of bus routes between Cork/Cork Airport should be reviewed if the prospect of encouraging walking holidaymakers to arrive via public transport is to be realised. Alternatively, it may be viable to establish a dedicated mini-bus/coach service/s to support walking holidaymakers and short-breaks, especially in relation to facilitating weekend breaks, as an additional means of stimulating interest.	**		
WCW12	Improve transport services facilitating the principal walks	WCW5, WCW6, WCW8, WCW11, WCW13, WCW18, WCW20, WCW21				WCDP, RTS	LCTG	Public transport services facilitating the walks from the Trail Heads needs to be assessed in terms of feasibility. This option would give walkers greater option and greater flexibility in exploring the area by the most sustainable means possible. It will also help to alleviate traffic pressures in smaller villages and towns.	**	@	€€

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WCW13	Develop walker-orientated accommodation at strategic locations	WCW5, WCW6, WCW7, WCW8, WCW11, WCW12, WCW18, WCW20, WCW21				WCDP, Operators, LCTGs	FI, CCC, KCC, SKDP, COT	Point-to-point walking as a walking option needs to be supported by the inclusion of dedicated accommodation provision at strategic points along the trail. Bunkhouses, bothies, camping provision, and a more recent accommodation addition known as 'Pods' can each be created at strategic points to create new provision to satisfy walkers needs where gaps are currently apparent.	*	@	€€€
WCW14	Actively encourage walking/outdoor activity retail outlets at strategic locations	WCW5, WCW6,				WCDP, Community Tourism Groups	Local Retailers	Retailers should be encouraged to carry items such as maps, outdoor clothing, compasses, walking boots, gaiters, and walking poles, and even some high-spend items such as optics and GPS systems.	**		
WCW15	Develop a Walking Trail that circumnavigates the Mizen Head Peninsula	WCW1				WCDP, FI, CCC, NTO, DECLG	RDO, LCTG	The Mizen represents the south-western tip of Ireland; it has an easily identifiable 'goal' for walkers in terms of reaching the Fastnet Lighthouse and Mizen Visitor Centre; and the Mizen Head Peninsula has its own distinctive landscape character that is 'different' again to the Beara and Sheeps Head Peninsula's.	*	@@	€€€
WCW16	Develop Ireland's version of the 'South West Coast Path' Trail	WCW1, WCW15, WCW18				WCDP, FI, CCC, NTO, DECLG	RDO, LCTG	Creating a new trail around the Mizen Peninsula would also give rise to Ireland's version of the South West Coast Path. This trail is one of the most used paths in the UK and therefore the concept has a clear market resonance which could be replicated along the West Coast	*		

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WCW17	Establish a distinctive 'destination' image and awareness for West Cork's West Coast as an walking/outdoor adventure hub	WCW1				FI, WCDP, LCTG	TI, COT, SKDP	This action will help visitors to readily identify with the characteristics that make the West Coast place an appealing prospect to visit. It should be designed to complement the existing Fuchsia (WCDP), South West and Failte Ireland Branding Strategies. An outside agency may need to be used to determine the right messages to be used.	***	@@	
WCW18	Establish clear marketing and packaging strategy for walking	WCW4, WCW5, WCW6, WCW7, WCW8, WCW9, WCW10, WCW11, WCW12, WCW17, WCW19, WCW20, WCW21, WCW22				FI, WCDP, LCTG	TI, COT, SKDP	A suitable marketing strategy underpinned the 'image/identity' of the West Coast needs to be developed and enacted to drive 'sales' in walking tourism. FI and WCDP are best placed to drive this forward, however a local tourism forum would help to develop the marketing strategy. Sufficient resources then need to be in place to support the marketing activities identified.	***	@@@	
WCW19	Establish special events, festivals and sponsorship 'challenges' based upon walking	WCW8, WCW9, WCW18				FI, WCDP, LCTG	TI, COT, SKDP	Special events, festivals and sponsorship 'challenges' should be considered in terms of helping to raise the profile of each of the principle walks. As annual events or distinct challenges, they should be used to raise the profile of the West Coast and walking opportunities as part of the marketing strategy.	**	@	
WCW20	Improve pre-visit information provision for walking (via a dedicated website)	WCW4, WCW5, WCW6, WCW7, WCW8, WCW9, WCW10, WCW11, WCW12, WCW17, WCW18, WCW19, WCW21, WCW22				FI, WCDP, LCTG	TI, COT, SKDP	A West Coast walking website needs to be developed to include pertinent information and messages (as highlighted above) coupled with clear maps, written guides of each section and a guide to the accommodation that is available at the key Trail Heads. The website will need to be professionally designed and maintained/updated.	***	@@	€

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WCW21	Improve at-destination information provision for walking using the TIC, branded guidebooks and apps for downloading on mobile devices for each trail	WCW4, WCW5, WCW6, WCW7, WCW8, WCW9, WCW10, WCW11, WCW12, WCW17, WCW18, WCW19, WCW20, WCW22				FI, WCDP, LCTG	TI, COT, SKDP	Local information needs to be available that complements and replicates that which is available on the website. TICs need to showcase walking and the walking trails available in the area through striking visual imagery, mapping, and clear 'outdoor adventure' messages. An app that can be used on mobile devices will allow walkers to maximise their time. These images and messages will need to be maintained/updated regularly.	***	@@	€
WCW22	Improve post-visit information provision for walking	WCW4, WCW5, WCW6, WCW7, WCW8, WCW9, WCW10, WCW11, WCW12, WCW17, WCW18, WCW19, WCW20, WCW21				FI, WCDP, LCTG	TI, COT, SKDP	A good pocket guide will sit as a reminder to walkers of the segments that they have yet to complete, especially if completed sections are marked with a stamp. The prospect of a certificate and name appearing on an 'honours' board' could also be used as an enticement.	***		
WCW23	Monitor walker use and satisfaction through visitor research to better understand, tailor and target the walking experience of the West Coast	WCW4, WCW5, WCW6, WCW7, WCW8, WCW9, WCW10, WCW11, WCW12, WCW13, WCW14, WCW15, WCW16, WCW17, WCW18, WCW19, WCW20, WCW21, WCW22				FI, WCDP, LCTG	NTD, COT, SKDP, DECLG	The counters placed upon the trails are useful in approximating walking numbers, however this needs to be supported by a more detailed understanding of the users and any changes over time. Periodic market research will help to provide greater understanding to the counts – suggested for year 2 and year 5 in this timeframe		@@	



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