

West Cork

Maximising the Benefits of Walking Tourism

Stage A Report – Final

January 2012

Prepared for



Comhshaol, Pobal agus Rialtas Áitiúil
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Appendix A: Accommodation Audit Notes and Assumptions

Appendix B: National Trails Office Criteria for International Standard Long Distance Walks (Draft)

The following report represents the Stage A report of URS Scott Wilson's investigation into the prospect of maximising the benefits of walking tourism in West Cork. This work has been conducted on behalf of the West Cork Development Partnership (WCDP).

The initial findings of the report were originally released as an interim report to aid the Stage B investigation and consultation process. To enable an iterative process, the responses received through the Stage B process has enabled certain queries and corrections to be made to ensure that Stage A report provides a robust baseline position of walking tourism in West Cork.

1 Introduction

- 1.1 Tourism forms a strong part of the overall fabric of the West Cork area. Sitting adjacent to internationally renowned Cork City and within Ireland's equally renowned 'South West' region, West Cork includes vibrant towns, an attractive coastline, and pleasant rural communities.
- 1.2 The purpose of this project is to examine the current position and value of walking tourism in West Cork; with walking tourism defined as holiday trips taken specifically for the purpose of walking (or walking holidays). However, in order to appreciate the true value of walking provision to the tourism sector, the study also provides an overview of the broader context and role of long distance, looped trails, heritage and other special interest trails across the area.
- 1.3 Walking as a leisure activity also needs the support of a variety of agencies in order to establish not only the walking pathways and trails, but also to maintain the quality of the pathways; market and package the routes; and ensure that the support facilities, services and amenities required by the walkers themselves are available and of appropriate quality. In this respect, national agencies such as Fáilte Ireland, the Department of Environment, Community and Local Government¹, Irish Sports Council/National Trails Officer, National Parks and Wildlife Services, the Forestry Service, Coillte, through to County Councils, local councils, businesses, and community groups each have a role to play in the delivery of walking tourism.
- 1.4 The study process has reflected this, with each of the key stakeholder groups being consulted in relation to the strengths, opportunities and challenges in delivering a more succinct and coherent walking tourism offer in West Cork, especially in relation to the area's premier walking routes, the Beara Way and the Sheep's Head Way (Western and Eastern Sections).

Study Aims and Outputs

- 1.5 As defined by the brief, 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.
- 1.6 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.

¹ Formally the Department of Community, Rural and Gaeltacht Affairs

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

1.7 The brief refers to the need to establish sustainable development of walking tourism within West Cork, however the study title focuses solely on the need to maximise its economic potential. If this title is retained, there is a danger that the other impacts, implications and benefits of walking could be inadvertently overlooked. Walking, as with any other form of tourism activity, can have both positive and negative impacts on the environment, the community and indeed the economy. Therefore, in order to accord with the sentiment of the brief and to ensure that study focuses on sustainable walking tourism, the title has been changed to the following:

Maximising the Benefits of Walking Tourism in West Cork

1.8 The potential strength of the associated impacts will depend upon a number of factors including the environmental sensitivity of key sites of interest; the willingness of the community to support walking tourism; and the ability of local businesses to adapt to the demands of the walking market. By changing the emphasis of the title to ‘Benefits’, it is possible to encompass all of the elements of sustainability. Subsequently, it is more likely that a walking tourism strategy and vision will have a more balanced approach to development and delivery; and fundamentally, one that is more universally adopted.

WCDP Agency Support

- 1.9 The primary role of the WCDP is to demonstrate the importance and value of direct support for local development initiatives and to further develop an environment and culture conducive to and supportive of local community and enterprise development. This is to be achieved through a co-ordinated and integrated approach at local level in identifying, harnessing and supporting the optimal development of local resources.
- 1.10 The vision statement for the West Cork Development Partnership envisages and plans for the development of the West Cork region as:

“A progressive and vibrant rural region of inclusive and engaged communities, where guided by the principle of sustainability, its social, cultural, natural and economic assets are harnessed to achieve an improved quality of life for all”

1.11 WCDP has set out seven objectives for rural development under the Programme (RDP) in the period to 2013. These are as follows:

- 1. DIVERSIFICATION INTO NON - AGRICULTURAL ACTIVITIES
 - Alternative farm enterprises, such as tourism, food processing, open farms, farm shops, craft production, manufacturing. Business creation and expansion.
- 2. SUPPORT FOR BUSINESS CREATION AND DEVELOPMENT
 - Assistance for start - up and expansion, collective marketing, local branding, innovative products and services, developing ICT capacity and enterprise space.
- 3. ENCOURAGEMENT OF TOURISM ACTIVITIES
 - Tourism infrastructure and amenities, marketing, accommodation, niche tourism service development, internet & e - commerce facilities, forest recreation and walking routes
- 4. BASIC SERVICES FOR THE ECONOMY AND RURAL POPULATION
 - Cultural heritage, community & recreational infrastructure, youth café development, community social and information networks, community shops, cultural activities.
- 5. VILLAGE AND COUNTRYSIDE RENEWAL AND DEVELOPMENT
 - Environmental upgrading, access to amenities, village enhancement, farmers markets, community greening, community gardens and allotments.
- 6. CONSERVATION AND UPGRADING OF THE RURAL HERITAGE
 - Preservation of built heritage & cultural traditions, integrated restoration and development plans, community waste initiatives, community renewable energy
- 7. TRAINING AND INFORMATION
 - Development training, sectoral training initiatives, particularly for food, craft and tourism, community skills and leadership, flexible learning, distance learning, building ICT capacity, rural development
- 8. IMPLEMENTING CO - OPERATION PROJECTS
 - Interterritorial (within Ireland) and trans - national (within Europe) co - operation projects to achieve objectives as outlined. Co - operation also aims to achieve critical mass and pool skills and resources.

2 Walking Tourism

Definition of Walking Tourism

- 2.1 Walking is one of the principal activities holidaymakers undertake whilst on a trip. This is largely because there are many different types of walking, from short historic trails, strolls along coastal promenades and meanders through garden attraction; through to multi-day treks across mountainous terrain, coastal cliffs and other dramatic (and potentially hazardous) terrain. Although the difference in the character of the routes can be stark, each can be classified as a 'walking' activity. Moreover, the availability of a walking pathway is as important to the presence of visitors as the landscape, site or setting. In other words, walking is fundamental to the discovery and experience of a destination.
- 2.2 From a 'walking tourism' perspective, a distinction needs to be made over importance of the action of walking as a motivation for visiting a site or a destination. On the one hand, there are holidaymakers who will undertake a walk whilst on their visit in a destination; and on the other there are those holidaymakers who are singularly motivated to visit a destination by the opportunity that walking that it presents.
- 2.3 In general terms, 'walking tourism' as a theme is concerned with the latter as a niche sector within the broader 'activities' market. However, it needs to be recognised that holidays that involve walking are, almost by definition much more prevalent meaning that any initiative, programme or project that looks to increase the presence of walking holidaymakers will inevitably have an impact on general holidaymakers who undertake walking. Nevertheless, the impact of this type of walking from an economic perspective is less clearly defined.
- 2.4 In accordance with the brief, this study focuses specifically on walking tourism/walking holidaymakers and its future potential in West Cork. However, in order to reflect the broader importance of walking provision, discussion will also be provided on the role of walking routes as a means of increasing the appeal of the area to other visitor markets where appropriate.

The General Growth of Walking Tourism

- 2.5 Walking has long held a strong synergy with tourism, not least because at one stage it was the only way one could travel from place-to-place. With the advent of faster and more convenient forms of transport over the ages, the role of walking in relation to tourism has understandably changed and become increasingly viewed as a leisure pursuit.
- 2.6 The growth in popularity of walking as a leisure pursuit is now truly international. This growth has been perpetuated by the fact that the accessibility of walking requires little in the way of formal equipment. Moreover it is an activity that has direct synergy with exploring and discovering some of the most scenic, precious and historic landscapes that the world has to offer, which in turn means that it has a direct and clearly defined synergy with tourism. For instance, walking on the Great Wall of China, trekking on the Inca Trail in Peru, hiking through Yosemite National Park, walking the Himalayas, walking along the Amalfi Coast and walking the Atlas Mountains in Morocco; each of these is available as a dedicated tourism package being presented to international audiences. This signifies the

overall strength of walking tourism as a ‘saleable’ theme from which destinations can develop market cognisance.

- 2.7 In addition, walking tourism is increasingly becoming associated with being a less environmentally damaging and more socially responsible way to explore a destination. Therefore, not only is walking an important tourism theme in its own right, it is also an activity that is strongly associated with one of the world’s fastest growing theme, eco-tourism. In this context, the market strength of walking tourism is only likely to get stronger in the longer term. The challenge for destinations, however, is to ensure that the walking tourism offer is of sufficient quality, interest and is supported by appropriate services to ensure that it can benefit from this overall market interest. The purpose of this study is enable West Cork to position its walking tourism product in a manner that achieves this overall aim.

General Walk Types

- 2.8 There are many different walking pathways available, each with their own attributes and market connotations.

Walking Pathway Types

- 2.9 As a means of providing a descriptive distinction between the different pathways available, irishtrails.com (the Irish Trails website established by the Irish Sports Council and the National Trails Office) presents the following route classifications to assist walkers in determining the suitability of the route in relation to their ability and interest. The categories are based upon objective assessments on the challenge of the pathway; the material under-foot; the length and type of pathway; any associated ascents and descents; and any specialist equipment needed.
- **Multi-access** - Flat smooth trails, suitable for all users including people with reduced mobility, wheelchair users, people with vision impairment, using crutches, with a buggy, with small children, older people and so on. Normal outdoor footwear can be worn
 - **Easy** - Generally flat trails with a smooth surface and some gentle slopes or shallow steps. These trails are generally suitable for family groups including children and the elderly. Normal outdoor footwear can be worn.
 - **Moderate** - These trails may have some climbs and may have an uneven surface where the going is rough underfoot with some obstacles such as protruding roots, rocks etc. The routes are appropriate for people with a moderate level of fitness and some walking experience. Specific outdoor walking footwear and clothing is recommended.
 - **Strenuous** - These are physically demanding trails, which will typically have some sections with steep climbs for long periods and the going underfoot can be extremely rough including many obstacles. Suitable for users accustomed to walking on rough ground and with a high level of fitness. Specific outdoor walking footwear and clothing required.
 - **Very Difficult** - These routes are predominantly in remote upland areas. They will typically include steep slopes and very variable and rough underfoot conditions on sometimes indistinct trails. They may be unmarked so the use of a map and navigational skills will be required. Suitable only for the very fit and competent mountain

walkers with a high level of experience. Specific outdoor walking footwear and clothing required.

- 2.10 This classification system is similar to others available across Europe. Some systems also use colour coding (blue = easy; black = challenging/difficult) or a numeric (1 = easy; 5 = challenging/difficult) to help distinguish the different trail grades. For the purpose of this study, we will utilise the grading definitions as identified above, although some coded classification might be useful locally.

Walking Market Categories

- 2.11 As identified previously, the ability and interest of ‘walkers’ is broad. From a destination perspective, it is important that the walk is keenly matched to a type of walker in order to ensure that their experience satisfies their expectations. This requires an element of market segmentation of walkers into a series of sub-categories based upon their ability and interests.

- 2.12 The following segmentation profile draws upon a variety of different sources. This includes research conducted on behalf of Natural England looking at users and usage of the National Trails of England; the general definitions of different walkers included in websites such as ‘walkersandhiking.co.uk; and research into the Scottish holiday experience for walkers²; and Fáilte Ireland research into the walking tourism market. We have sought to drawn upon and expand the definitions used here to provide greater market segmentation. The key segments are as follows:

- **Amblers** – walkers using short distance routes that may have a specific environmental, heritage, or other special feature of interest (including rivers, canals, pubs) that entice use of the route. The walks themselves tend to be within the ‘easy’ category with few challenges, if at all. Amblers are a broad market with no distinct age profiles. They also include people with impaired mobility. Walking as an activity is generally not the main purpose here, but rather it is required as a means of accessing or pursuing another interest - i.e. walking is ‘incidental’.
- **Ramblers** – more serious walking enthusiasts that will plan day trips and overnight trips to destinations for the specific purpose of walking. This market can be further sub-divided by their experience and the ‘challenge’ they are seeking:
 - **Beginners** – those who are new to walking as a leisure pursuit and require guidance on the types of routes, the equipment needed, and assistance in planning trips. Walking is likely to be the main purpose, but they have a great need to be supported by good advice from trusted operators and guides. When guided, they will be able to experience strenuous and very difficult pathways. As independent walkers, they are generally advised to seek easy to moderate routes (although this advice is not always heeded).
 - **Part-time wanderers** – those who enjoy walking across and within special places and scenic environments using structured and waymarked walks with clear signposting (easy, moderate and some strenuous walks). This market has a tendency to look for other things to as part of their trip, with walking likely to be coupled with visiting historic houses, gardens, local events or wildlife watching for

² The Walker’s View Of Walking In Scotland, commissioned by Scottish Natural Heritage, Scottish Enterprise, VisitScotland and Forestry Commission Scotland, 2005

example. This group tends to look for comfort in relation to accommodation and travel. They are also more likely to be centre-based walkers, with a variety of different walks likely to be regarded as a strength of the destination.

- **Committed wanderers** – those who participate in hiking and walking regularly as a pastime and holiday pursuit, but generally stay on moderate to strenuous walks. They tend to be well prepared and have skills in orienteering, but will still welcome well-maintained and clearly marked paths. They will look for comfort in relation to both accommodation and travel, but are more likely to seek providers that actively ‘welcome’ walkers. This group can either be centre-based or point-to-point walkers, and will consider walking tours in order for them to get the most out of the destination.
- **Part-time explorers** – experienced walkers who like a walking challenge but will also seek in other activities on holiday such as visiting places of interest, going to pubs and restaurants. This group has a greater tendency to use specialist walking information, but will also seek other information on what there is to ‘see and do’ in the destination. Although different types of accommodation are used, they will look for low cost hostels and bunkbarns where they are available to both use and to validate the quality of the walking experience. They have a tendency to seek out and complete identified/named/well known walking routes, but they are willing to do this over several visits should the length of the route be prohibitive in one visit.
- **Committed explorers** – explorers and extreme hikers who thrive off the challenge of ‘extreme’ routes with significant ascents, descents and other barriers and obstacles. They have a willingness to go ‘off-trail’ to discover new places or walking across the more difficult terrains or terrains they consider ‘virgin’ to mainstream walking. Walking is the main purpose of the holiday but it must include a sense of adventure. This group are highly specialised and will likely to have undertaken some form of orienteering/mountaineering course. This group will also have specialist equipment, including their own mini-tents/bivouac to allow them to rest on route at undesignated spots (where possible). Outside of this, bunkbarns are likely to be their preferred accommodation, although small camp-sites and hostels might be acceptable, especially at the beginning and end of multi-day routes.
- **Scramblers** – a cross between challenge hiking and rock climbing using simply hands and feet, this is an adventure activity theme that will have a more specialised market focussed linked with a more youthful, adventurous market.

2.13 As ever with market segmentation profiling, the above is likely to have a significant element of fluidity, with life-stage influences likely to have a bearing on the decision-makers final choice of route and/or accommodation type. For example, committed explorers are likely to change their behaviour if travelling as part of a less experienced group or if they have a family. Nevertheless, walking as an activity is still likely to be prominent in their destination decision-making process.

2.14 The above categorisation will be used to determine the characteristics of the existing walking routes of West Cork and the market opportunities associated with each.

The Importance of Walking Tourism – An International Perspective

- 2.15 As highlighted above, walking is now one of the most important activities offered by destinations. Moreover, it is an activity that generates significant rewards for both the visitor and the destination at comparatively low cost:
- For the visitor, walking is one of the most rewarding ways to explore a destination that, on the whole, does not involve significant expenditure, expertise, or experience. It allows access to more remote places and can be used as a means of escapism. It is also regarded as a 'greener', more socially responsible and more culturally engaging means of exploration.
 - For the destination, providing for walkers has a lower level of capital cost when compared with activities; it encourages more sustainable movement around the destination; it allows more remote and peripheral places to become accessible to visitors, spreading their impacts; it generally extends the tourism season beyond the traditional summer months; and it encourages greater interaction between tourists and more remote businesses and communities.
- 2.16 As a result, many rural and coastal destinations, which are of a comparable character of West Cork, now include walking as a fundamental part of the tourism experience. Moreover, walking tourism is being actively that is being encouraged and supported by a variety of initiatives.
- 2.17 The following explores this premise further in Scotland, England, Wales and Spain, looking specifically at the examples of the West Highlands, the Brecon Beacons, South West Coast Path and the Camino del Santiago respectively.

Scotland Walking Tourism

- 2.18 Scotland has a strong reputation for offering some of the best walking in Britain. This position has been established over many years, but there has been a concerted effort by VisitScotland and other public and private sector agencies to push walking tourism over the last 10-years. A catalyst for this were observations on the growing popularity and benefits of the activity through various studies, the key findings of which are as follows:
- Research conducted in 2003 suggested that the Highlands and Islands of Scotland attracted some 5.2 million holidaymakers that participated in walking in the area, which in turn generated 15.3 million nights (average of 3-nights per stay)³. Of this, 1.1 million trips were specifically for walking (walking holidaymakers).
 - Visits to the Fife Coast Path was estimated to be between 480,000 (low case scenario) and 580,000 (high case scenario). Overall, 60% of path users spent something during their visit with average spend per path user being £26. As a result, the estimated economic value of this 150km route was between £24 million (low case) and £29 million (high case)⁴.

³ Economic impact of outdoor and environment related recreation in the Highlands and Islands: research report - walking and mountaineering

⁴ Fife Coastal Path Usage Study, Fife Coast and Countryside Trust 2007

- Research indicates that The West Highland Way, Scotland's most popular official long distance route, attracts 75,000 visitors a year that generate £3.5million and supporting around 200 local businesses⁵.
- 2.19 This type of evidence helped to support the rationale for the Land Reform (Scotland) Act 2003 for Scotland, an act that gives everyone a statutory right of access to all land and inland waters (with some exclusions) for outdoor recreation, for crossing land and water, and for some educational and commercial purposes. With Scotland having considerable swathes of countryside and rural areas, this act subsequently gave much more scope for further developing the country's reputation for a wide array of walking routes across some of the most attractive countryside in Britain.
- 2.20 In order to capitalise on the growing provision for walking and to stimulate market interest, VisitScotland has established a dedicated 'walking' segment to its website (walking.visitscotland.com). This site highlights the key aspects that visitors look for during their stay in one easily navigable site that draws together all of the elements that walkers seek when deciding and packaging a walking trip. This includes:
- detailed descriptions of the walks available in the different areas of Scotland, including categorisation by length, challenge and, where appropriate by theme – hill walks, wildlife walks, family walks, walks for people with mobility impairments;
 - accommodation provision associated with the walks, all of which are included in VisitScotland's 'Walkers Welcome' scheme;
 - access and travel to the walking hubs associated with the different walking areas;
 - details of special walking events – e.g. Ballater Walking Festival (Cairngorms National Park), Newton Stewart Walking Festival (Galloway), Caithness & Sutherland Walking Festival (Caithness); and
 - details of locally-based, VisitScotland accredited walking tour operators.
- 2.21 In addition to this, the popularity of walking as a theme has led to other dedicated walking websites such as walkscotland.com, walkinginscotland.org, and walkhighlands.co.uk.

Western Highlands Walking

- 2.22 Although there are many areas that visitors can walk in Scotland, one of the popular places to walk is the Western Highlands largely due to the ascent Ben Nevis, the highest mountain of the British Isles, and its association with the West Highland Way, one of Scotland's most popular long distance trail that begins in Glasgow.
- 2.23 The walk to the summit of Ben Nevis is one of the most popular mountain hikes in the UK, attracting a reputed 100,000 ascents per annum⁶. However, this is just one mountain trek that is available within an area that has a large number of long-distance and challenging walks. Glen Coe, to the south, is also identified as 'a mecca for hillwalkers and mountaineers' whilst the north is has a wilder character that, although less visited, is appealing to those seeking more challenging and 'off-trail' walking experiences.

⁵ Ramblers Association

⁶ John Muir Trust

- 2.24 Altogether, the number of named walks that are advertised on walking.visitscotland.com is 61, with 28 of these also featuring on Walking World⁷. The trails are a mix of moderate through to difficult/challenging hill and mountain walks.

Local Impact and Importance

- 2.25 Previous research⁸ has identified that the value of walking tourism in Highlands and Islands Region could be as much as £245 million. Although this is not broken down into sub-region, it is arguable that the Western Highlands accounts for a significant proportion of this value, particularly given the concentration of accommodation in and around Fort William, the area's principal town and central tourism hub.
- 2.26 The importance of walking tourism to the area is reflected in the fact that over 210 accommodation providers that have signed-up to VisitScotland's Walkers Welcome Scheme in this area alone. Moreover, there are a number of establishments that have been especially designed to cater to accommodate walkers and the outdoor market, such as:
- Corran Bunkhouse - two separate bunkhouses with a total of 32 beds with each bunkhouse having a drying room, kitchen and lounge.
 - Ben Nevis Inn - hostel bunkhouse offering self-catering accommodation for walkers and mountaineers including a large kitchen, comfortable bunks, and a separate drying area. The bunkhouse is largely open plan with 24 beds split into three sections.
 - The Grey Corrie Lodge – walker friendly, budget accommodation with wood burning stove, hot showers, common room, kitchen, drying rooms and a washing machine. There are 6 2-person rooms, 2 four-person rooms and 1 eight-person room, all with bunkbeds. All rooms have a heater and washbasin.
 - Walkers Rest Bunkhouse – 6-bed hut with hot showers and warm, clean beds, drying area, laundry facilities and free wi-fi available.
 - Blackwater Hostel, Camp Site and Microlodges (Kinlochleven) - 39 beds in 10 en-suite rooms; 30 camping pitches; and 5 'Hobbit' Microlodges.
- 2.27 Walking forms one component of the outdoor offer of the area, with Fort William and its surrounding countryside now renowned as the 'Outdoor Capital of the UK. However, it is arguable that walking is by far the largest single market. In contrast, ski-ing, one of the area's other key outdoor activities, is seasonal that is dependent upon snow fall and generally requires specialist equipment and training. Likewise, mountain biking is a niche interest activity that has more defined (younger) market characteristic. There is no doubt that the addition of other activities is important to the overall reputation of the area, reinforcing the 'Outdoor Capital' message. However, it is the walking that underpins the supporting visitor economy, especially accommodation stock. Remove walking from this mix and the sustainability of these businesses, especially in Fort William, would certainly be compromised.
- 2.28 This premise not is not only applicable to accommodation enterprises and catering, but also retail. Building upon the outdoor activity hub theme, there is now a strong presence in

⁷ Walking World is an online resource offering information on over 5,000 walks across Britain. It is a subscription service.

⁸ Economic impact of outdoor and environment related recreation in the Highlands and Islands: research report - walking and mountaineering

outdoor activity and outdoor fashion retail outlets in Fort William. Retailers Millets, Blacks, NevisSport, Regatta, The Country Outlet, Fat Face, and Tresspass all have an outlet in Fort William, a centre that has a residential population of 10,000. In addition, other outlets including grocery shops and service stations have also noticeably branched into ‘outdoor’ goods. This position would not be possible without the presence of outdoor activities, and primarily walking, in the surrounding area.

A Walker’s View (Scotland)

2.29 In order to continue to adapt and modify the visitor product of Scotland to accommodate walkers better, research⁹ was conducted in 2005 determined the views, preferences and behaviours of walking visitors to the country. The following key indicators were realised:

- The types of walks preferred by the walkers interviewed varied, although moderate walks of between 1 to 5 miles in length were the most popular (40% preferring). Of the remainder, 20% preferred hill-walking or mountain walks, 17% preferring longer walks and rambles of over 5 miles, while 4% of those interviewed preferred long distance walks, such as the West Highland Way. A significant proportion (18%) of people said that they preferred a mix of different types of walks.
- The majority of walkers interviewed had planned and booked their travel independently, with the most common source of information being the Internet. The Internet was also the most used method for booking.
- Scotland provides the type of walking holiday to satisfy a wide range of walkers, however it has greater provision to satisfy Part-time Wanderers, the Committed Explorers and Part-time Explorers.
- The enthusiasm and knowledge demonstrated by businesses, especially accommodation providers and operators in walking areas, and the wide provision of walking facilities and information in all types of accommodation were regarded as strengths of the Scottish walking product. However, Switzerland was credited as being better for being able to match public transport provision to the needs of walkers.
- Suggested improvements included flexible meal times (for example earlier breakfasts for those planning an early start); more facilities such as drying and storage areas; information on which public transport was best for reaching the starts of walks; more proximity between transport stops and starts of walks; and a shuttle service for getting to the start of remote walks or moving between walks.
- Ensuring that holiday packages identified the potential to mix walking with other outdoor activities was also identified.
- Improvements suggested for the walks themselves include clearer marking of the start of more remote walks, and more information on moderate walks about the local wildlife and history, which were identified as being of interest for many walkers.

2.30 Although these observations are specifically related to Scotland, we feel that they also provide recommendations that apply to walking destinations more generically.

⁹ The Walker’s View of Walking in Scotland, 2005

Walking Tourism in Wales

- 2.31 The Wales Tourist Board (WTB) identifies walking as a key activity market to be targeted, recognising that 'good walking country' is fundamental to the appeal of rural and coastal areas. The WTB also denotes that walking tourism contributes to reducing seasonality, with experienced walkers and hill walkers having greater tendency to visit in autumn and winter months.
- 2.32 The WTB identified that the key components for establishing Wales as a strong walking destination are as follows:
- Quality, variety, and extent of country and coastal scenery.
 - A widespread 'rights of way' network.
 - A rich culture and heritage that can be discovered on foot.
 - Established local, national, and regional walks and trails that can be found throughout.
- 2.33 In order to support and better facilitate the enjoyment of walking by its visitors, the WTB also identified the following key requirements:
- A wide range of walking guidebooks and walks leaflets.
 - A tailored 'welcome' to walkers, especially by accommodation operators.
 - Walking festivals staged throughout.
 - Guided walks at many destinations throughout the year.
 - Public transport services specifically tailored and promoted to walking visitors.
 - A range of sources of information on local walking opportunities.
- 2.34 The rationale for supporting walking tourism in Wales was examined more closely through a study in 2006¹⁰. This study examined the benefits of walking tourism of the three National Trails in Wales; Glyndŵr's Way, Offa's Dyke Path and the Pembrokeshire Coast Path. The key findings of the research were as follows:
- Over one third of accommodation providers located on or near a National Trail describe the Trail as 'very important to the profitability' of their business.
 - On average, accommodation providers attribute 36% of their turnover to the National Trail, each business employing on average 3 FTE people.
 - Accommodation providers believe that almost 40% of their visitors come to the area to walk the National Trail. Overall, walking is of some importance to over 60% of their visitors.
 - 68% of accommodation providers said that the proportion of their visitors making use of the National Trail had grown over the last 3 years.
 - Almost half of all accommodation enterprises were found to provide accommodation for tour operators providing a walking package on a National Trail.

¹⁰ The Benefits To Business Of The National Trails In Wales, Countryside Council for Wales

- Just over one half of service providers say that the National Trail provides them ‘with welcome additional income’. A further one fifth describe the National Trail as ‘very important to the profitability’ of their business.
- 2.35 The overall value of the walking trails is not determined through this study, however the main conclusion was that value of walking tourism to businesses (and thus the overall economy) was significant and needed to be reflected locally. In particular, walking was the National Trails were regarded as named and saleable assets with associated landscape images and promised experiences that can be used to draw potential visitors to Wales.

Brecon Beacons Walking Tourism Strategy

- 2.36 As a destination-based response to developing walking tourism, a dedicated Walking Tourism Strategy was prepared for Brecon Beacons National Park in 2005. As an area made up of four distinct upland areas (the Brecon Beacons, the Black Mountains, Fforest Fawr and the Black Mountain), this living and working landscape offers plenty to appeal to the walking market. The purpose of the strategy was to ensure that walking forms a vital component of the tourism offer for the National Park whilst also ensuring that the activity itself is subject to proper management.
- 2.37 The strategy identified close to 3,850km of linear access paths in the Brecon Beacons, the majority being on PROW (51%). The remaining pathways are on non-PROW upland paths (19%), extensive unsurfaced but traffic paths (13%) and forest tracks and paths (16%).
- 2.38 The strategy estimates that walking tourism ranges from between £25.0 million and £31.2 million per annum with 47% of visitors to the Park intending to pursue walking as an activity. The strategy also highlights that, contrary to a perception of walkers as low spenders, walkers actually had a significant value due to their propensity to stay longer. Moreover, walkers would spend considerable sums on purchasing the right equipment that meant that, if available, they could be persuaded shop for goods once at a destination. This was reinforced by the fact that two-thirds of the walking tourism market was defined as being within the ABC1 socio-economic category.
- 2.39 As a means of developing an excellent walking experience in the Brecon Beacons, the strategy highlights the following initiatives are required:
- Any walk endorsed and advertised by the Brecon Beacons National Park Authority (BBNPA) be well maintained, problem free, well signed and waymarked.
 - There needs to be a range of high quality accommodation to suit the different market walking segments.
 - The distinctiveness of place needs to be added through the integration of food, culture and the wildlife where appropriate.
 - Enterprises should be encouraged to join the Wales’s ‘Walkers Welcome’ scheme to go beyond the basic requirements.
 - Encourage more enterprises and operators to become familiar with the walking routes as a means of assisting any visitor queries.
 - Clearly identified walking hubs need to be established – either through cluster enterprises or communities – that will become centres of excellence for walking by offering a good pool of quality accommodation, having at least one place to eat, public

toilets that are of a high standard, being served by regular public transport, access to taxi services, offer guided walks and ‘local’ assistance for anyone who becomes lost, and (by no means least) offers easy access to promoted and named walks.

- 2.40 In order to accord with Sustainable Tourism principals, as well as promoting walking tourists the strategy is also concerned with managing damage created by concentrated use, particular erosion and disturbance to wildlife. Therefore, encouraging walkers to adopt a Code of Conduct that encourages environmentally sympathetic behaviour and which encourages greater appreciation (and support of) the natural environment.

Walking Tourism in England

- 2.41 Walking, rambling and hiking are the most popular activity-based holidays in England. According to VisitEngland, walking holidays are popular with all ages and have high participation levels, although more strenuous hiking and rambling generally appeal more to younger groups.
- 2.42 It is estimated that England has over 188,000km of rights of way and over 33,600km of long distance paths. According to the Ramblers Association, there are over 527 million walking trips made annually to the English countryside with a combined expenditure of £6.14 billion (£11.65 per trip), with the majority of these are day visits.
- 2.43 However, the value from a tourism perspective is much larger. Although somewhat dated, the 2003 UKTS¹¹, walking is the main activity undertaken by visitors whilst at a destination, with 5% indicating that is the main motivation (i.e. walking holidays) or as an activity undertaken once at a destination (71%). Assuming these figures hold true for the current domestic market, this would equate to 5 million walking holiday trips, with 73 million tourism trips that involving walking overall. Both figures demonstrate the fact that that walking already features strongly as an activity and motivator within the consciousness of the English market. Moreover, the value of walking holidays in the UK would be around £605 million.
- 2.44 The variety of walking available in England is exemplified by its 15 National Trails, with the South West Coast Path hugging the coastal areas between Poole Harbour, Dorset and Minehead in Somerset; the Pennine Way that runs through the heart of three of England’s most popular National Parks (Peak District, Yorkshire Dales and Northumberland); and the Thames Path that traverses quintessential low-lying English countryside from its source in Gloucestershire as it meanders its way to London. The importance of these trails from an access perspective is reflected in the fact that most have a dedicated trails officer or team to help manage and co-ordinate improvements to the trail itself, as well as provide promotion and marketing to encourage use of the route.

England’s South West Coast Path

- 2.45 As identified above, the South West Coast Path in England is the longest national trail in the UK, covering some 1,000km. The trail is defined as one of the World’s Great Walks, as it covers an array of coastal scenery, wildlife and heritage. It would take approximately 8-10 weeks to complete in one go, however most users complete smaller sections on either day trips or multi-day trips with some eventually completing the route over many years. This, in itself, is the challenge.

¹¹ United Kingdom Tourism Survey

- 2.46 A study conducted by the University of Exeter found that the path creates £300million a year for the region's economy – enough to support more than 7,500 jobs. Key findings of the study were that:
- more than a quarter of the region's visitors are drawn to the area purely because of the SWCP, and these visitors alone spend around £136million a year;
 - residents of the four counties crossed by the route take some 23 million walks along the SWCP each year, spending £116million; and
 - local people often take their visiting friends and relatives for coast path walks, bringing in a further £48million.
- 2.47 In addition, it was found that 70% of accommodation providers along the route stated that the coastal path is the main attraction.
- 2.48 The South West Coast Path is one of the National Trails that is supported by a dedicated team responsible for co-ordinating the management and promotion of the 630-mile National Trail. The team, which consists of Trails Officer, Communications Officer, and Administrative Officer, is funded by Natural England but their activities are supported by local councils and other landowners such as the National Trust. The purpose of the team is to ensure that the path is maintained to a high standard and thus ensure this remains one of the world's greatest walks, and thus retaining the value of this walk to the economies of the different counties that the route crosses.

Walking Tourism in Spain

- 2.49 Spain as a tourism destination is better known for its coast, beaches and sunshine rather than walking tourism, however the Spanish Tourist Board has been seeking to highlight the country's other tourism assets. In this respect, it has recently been reported that the Spanish Government is to invest €1 billion in developing more sustainable tourism products, with culture, heritage and activities being the key themes for investment. Walking is likely to be included within this, with one of its most popular and internationally recognised routes, El Camino de Santiago, a key asset that combines these three themes.

El Camino de Santiago

- 2.50 El Camino de Santiago is (The Way of St. James) is a major Christian Pilgrimage route that is over 1,000-years old. It is actually a collection of routes that cross mainland Europe, but the main destination is the Santiago de Compostela in north-west Spain as their final destination. As such, the Camino Frances in northern Spain is the most used section which starts at St Jean Pied de Port on the French side of the Pyrenees and finishes approximately 780km later in Santiago.
- 2.51 On an average year, it is estimated that more than 100,000 people walk that Camino Frances as a multi-day tour, although most are said to start closer to Santiago. However, during Holy Year, such as in 2010, as many as 1 million people were forecast to walk the Camino with 250,000 expected to reach Santiago and earn their 'compostela'.
- 2.52 Data on the economic value of the route has not been recorded, however assuming an average duration of stay of around 3 nights per trip and a spend of €100 (the average for the region), then in direct revenue, over €30 million can be attributed to this route.

3 Walking Tourism in Ireland

- 3.1 As with other country destinations, Ireland is seeking to increase its walking tourism profile through the concerted efforts of a variety of different organisations. The following examines the strategic context for route development, particularly in terms of the availability and impact of walking pathways in Ireland and how this compares with market experiences elsewhere in Europe.

Strategic Context

- 3.2 Walking tourism is recognised to be increasing growth of walking in Ireland (see below), however it is important to understand that it has started from a comparatively low base, particularly when compared with overseas destinations. One of the biggest inhibitors of walking tourism in Ireland has been the lack of ‘rights of way’ or ‘rights of access’ to certain types of land – e.g. mountain, moorland, heathland, downland or forms of registered common land – that is afforded to England, Wales, Scotland, Finland, Norway, Sweden, Switzerland, and Austria, for example, albeit in slightly different guises. As a result, it is no surprise that these countries have managed to establish popular walking routes and a reputation for delivering high quality walking tourism experiences over the years.
- 3.3 Ireland, by comparison, has a strong culture of private land ownership and commonages with no public access rights being provided. As a result, Ireland is lagging behind these countries as a destination available to walking tourists, although this position is rapidly changing through the work and initiatives of key agencies at both a national and local level (see below).
- 3.4 The following examines the measures that have been introduced to establish walking routes and trails now available to facilitate walking tourism. As stipulated previously, the focus of this report is on the main trails available in West Cork as those trails that drive visits to the area (and indeed to Ireland). Nevertheless, the role of all routes needs to be acknowledged in their support of walking holidays as well as holidays that involve walking. For example, the creation of certain routes (e.g. Sli Na Slainte and some smaller, local routes) are unlikely to drive walking tourism trips to Ireland, however they can form an important part of the tourism offer locally. It is for this reason that these initiatives are included in this analysis.

Support for Route Development

- 3.5 The Department of Environment, Community and Local Government, Irish Sports Council, Fáilte Ireland and the various LEADER partnerships across Ireland have been at the forefront of developing and promoting walking routes across the country. The following provides a synopsis of the strategies and programme achievements.

Irish Trails Strategy, 2008

- 3.6 The preparation of the Irish Trails Strategy was in response to the changing demands of both tourists and the Irish population in terms of their use and requirements from long distance walking trails.

- 3.7 Since 1979, 33 waymarked walking routes had been developed in Ireland. However, the new strategy highlighted that recreational trail development had not, to that point, progressed in line with demand and that the quality and standard of the trails fell below international standards.
- 3.8 The strategy highlights that a number of initiatives have created walks, including:
- Irish National Waymarked Trails Network – now standing at 43 walks, the National Trails network traverses across Ireland’s diverse and unique countryside. The challenge of the walks comes from their length, difficulty of navigation and/or the terrain they cover. However, overall they can have been established to be enjoyed by a greater number of users. Both the Beara Way and The Sheep’s Head Way are classified as National Trails.
 - Fáilte Ireland National Looped Walks – now standing at 120 walks, the trails are of different length and difficulty, taking approximately 1.5-3 hours to complete (see below).
 - Coillte Recreation Infrastructure Development Programme – supported by the National Development Plan, Coillte continues to invest in walking and cycling trails across the country.
 - Pilgrim Path Project, Heritage Council – the development of walking routes that follow the routes of medieval pilgrimage paths.
 - Irish Heart Foundation Sli Na Slainte Programme – a health promotion initiative that has created some 140 local walks aimed at encouraging people of all ages and abilities to walk for pleasure and improving health.
 - Ballyhoura Failte – an impressive network of off-road trails that offers much for walkers and cyclists.
- 3.9 The strategy denotes that domestically Irish residents’ use of recreational trails is estimated to be in the region of 17.5 million trips annually, although this includes road cycling, mountain biking, kayaking/canoeing and recreational horse riding as well as walking. Research conducted in the preparation of the strategy highlighted that most were not specialist users and were motivated more by the natural scenic beauty of the environment; to gain awareness and knowledge of nature and heritage; or to socialise with friends or family; rather than to undertake the walk itself. The strategy also acknowledges that walking is a key activity in generating holiday visits to Ireland and can be used as a means of arresting declining tourism fortunes in the country, subject to meeting international standards and market requirements.
- 3.10 Among the strengths of the trails are the fact that they represent extensive provision (8300km); they include access to significant swathes of public land (e.g. Coillte, National Parks, Nature Reserves); and many have been established from community roots with the enormous goodwill of local landowners. However, access is also highlighted as a major weakness with the lack of ‘right of access’ to private land a particular constraint. This issue is examined more below.
- 3.11 The Irish Trails Strategy concludes that the aim should be to create and maintain a world-class trail network that respects and protects Ireland’s countryside and where communities throughout country can benefit from its use. In this respect, the guiding principles for the strategy are to establish:

- sustainable and sensitive trail development;
 - appropriate provision for people with disability;
 - sustained user, landowner, community and agency involvement and support;
 - strategic investment;
 - integrated trail planning, implementation and monitoring/ongoing evaluation; and
 - coordinated marketing and promotion.
- 3.12 A key recommendation of the strategy was to establish the Irish Trails Advisory Committee (ITAC) as a means of facilitating the aims and objectives; and the creation of the National Trails Office in order to deliver key functions. These functions include:
- to work in close association with the ITAC, informing and guiding on all matters relating to trail policy development;
 - implement the priority projects recommended actions of a five-year plan;
 - guide, facilitate and monitor the planning, provision and maintenance of trails at local (county) and regional levels;
 - maintain an up-to-date register of all approved trail developments on a county-by-county basis;
 - provide a technical advisory service on all new trail development projects, ensuring compliance with recommended standards;
 - coordinate a trail quality assurance programme;
 - establish and maintain systems to monitor and evaluate the administration, outputs, outcomes and impact of trails, and to review policy and practice in light of the results;
 - quantify the resources (financial, personnel and materials) required to maintain and develop trails in accordance with agreed plans and standards, and advise the Irish Sports Council, through the ITAC on the annual and medium term requirements, in accordance with agreed budgetary procedures;
 - administer the funds made available to it for the planning, development, maintenance and evaluation of trails assess the overall personnel and skill requirements necessary to support the planning of a trails network and to advise on the adequate supply of appropriate expertise;
 - liaise with relevant national, regional and local agencies to agree an ongoing integrated marketing and information strategy in respect of trails; and
 - prepare and publish regular reports on trails, with particular reference to progress in relation to plans, outcomes of evaluation and levels of usage.
- 3.13 The National Trails Office now produces guidance on route development, trail classification, and route monitoring programme which is tied both to the Walks Scheme (see below) and indemnity insurance for landowners should walkers injure themselves on the walk. The organisation has also developed the irishtrails.ie website from which information on both nationally and locally designated trails can be accessed and downloaded.

Fáilte Ireland's Walking Tourism Strategy

- 3.14 Fáilte Ireland has utilised research conducted in 2009 to establish a dedicated Walking Tourism Strategy covering the period 2009-2012.
- 3.15 The strategy highlights that the main motivation for walking tourists is the quality of the natural, unspoilt scenery and sightseeing available. Moreover, it stipulates that the key market segment that it is seeking to accommodate are “lifestyle/recreational” walkers that are seeking looped walks of up to 4-hours.
- 3.16 As a result, Fáilte Ireland has focussed its development strategy on establishing and promoting a greater number of looped walks to supplement the National Waymarked Trails highlighted above. It is the intention that these walks can be bundled with other activities/attractions as a means of providing continued growth in numbers from overseas and domestic visitors.
- 3.17 In terms of matching provision to walking visitor needs, the availability of drying facilities, packed lunches, pick-up service and baggage transfer services are identified as priorities. In order to encourage this type of coherent package, Fáilte Ireland has established its own ‘Walkers Welcome’ programme. In contrast with similar schemes in England, Scotland and Wales, a key focus of the programme is to engage the whole community, recognising that a key differentiator of the walking tourism experience in Ireland is likely to be visitor interaction with the community.
- 3.18 The strategy highlights that the supply-side of walking tourism in Ireland is derived through the provision of 43 National Waymarked Trails and the creation of over 120 looped walks under the National Loops Initiative with the support of the Department of the Environment, Community and Local Government. The walks were established in predominantly coastal, mountainous, and island with the purpose of addressing gaps in provision. The routes are available from the website www.discoverireland.ie/walking with downloadable maps and directions. Of this, 21 loops are identified as being in County Cork, namely:
- Mount Hillary Loop – 10km moderate walk mainly in forested habitat to the summit of Mount Hillary.
 - Creha Quay Loop – 6km easy walk from Eyries on the Beara Peninsula
 - Drimoleague Heritage Loop – 4km moderate walk from Drimoleague
 - Father Murphy's Loop – a second loop associated with Mount Hillary, 7km easy
 - Sheep's Head Loops – two loops (short loop and long loop) around the Sheep's Head Peninsula (see section 4 for more details)
 - Claragh Loop – 10km moderate walk around the Claragh Mountain
 - Baran Loop – 9km moderate-hard walk from Ahakista to Rosskerrig Mountain
 - Ardnakinna Lighthouse Loop – 16km (in total) trail on Bere Island, split into two looped sections, the Western Loop and the Rerrin Loop.
 - Knightfield Loop - a third loop associated with Mount Hillary, 4km easy
 - Cahergal Loop – 10km hard route from Kilcrohane, Sheep's Head
 - Rows – Langford Loop – 5km easy loop in forest setting

- Pullen Loop – 5km easy trail on the Beara Peninsula
 - Cahir Loop – 6km moderate trail on the Sheep's Head Peninsula
 - Bullig Bay Loop – 4km easy route from Castletownbere
 - Killavullen Loop – 12km moderate trail around Corran Mountain
 - Glanlough Loop – 20km hard trail on the Sheep's Head Peninsula, starting at Ahakista
 - Garnish Loop – 4km moderate trail on Garnish Island
 - Glanaclohy Loop – 9km strenuous walk to Coomanore Lake
 - Banane Loop – 5km easy walk loop in a forest setting
 - Seefin Loop – 13km hard trail on Sheep's Head Peninsula starting at Ahakista
- 3.19 In general, the Looped Walks are generally in areas of outstanding scenic beauty, are off-road and are of 1.5-3 hours in duration. They have been established in order to satisfy the needs of 'occasional walkers', which Fáilte Ireland describe as being a person of variable fitness levels, limited navigation skills and unlikely to have done research prior to arrival. These trails are headed by designated 'Trail Heads' that provide facilities such as car parks, map boards and picnic areas.
- 3.20 The designation of these walks has been achieved largely through the Walks Scheme.

The Walks Scheme

- 3.21 As identified above, a critical issue constant throughout Ireland is that there is no 'right of public access' and there are few 'public rights of way' over privately owned land in the countryside and rural areas of Ireland.
- 3.22 As a result, the Irish Trails Strategy denotes that the provision of trails in Ireland has always relied upon the enormous goodwill of landowners, but that this was only possible when demand was relatively modest. Consequently it was recognised that, as demand increased going forward, a system would need to be introduced that acknowledged the role of landowners not only in terms of the providing access, but also as a means of maintaining the pathways to a standard expected of the walkers themselves.
- 3.23 The response to this need was to establish The Walks Scheme in 2008, funded through the Department of Community, Rural and Gaeltacht Affairs. At a local level, the Walks Scheme is administered by the local LEADER companies with the support of the National Trails Office at the Irish Sports Council and Fáilte Ireland. The scheme provides farmers/private landowners with an agreed annual payment to facilitate the development, enhancement and maintenance of nationally identified waymarked ways and priority walks. Key elements of the scheme are as follows:
- The agreements will last for a period of 5-years.
 - Six-month notice is required before a participant can seek to leave the scheme.
 - For commonages, a single work plan will be agreed between the commonage owners with the hours of work divided between all individuals.
 - The responsible Local Authority will provide insurance for farmers/landowners for recreational use of the land.

- The walk route will be inspected by a suitably qualified person to ensure standards are maintained.
 - The minimum trail maintenance is set at 50-hours per annum with the maximum payment being for up to 200-hours maintenance unless prior agreement is reached.
 - Works can be undertaken by the landowner or contracted to others through a maintenance contract, including those involved in the Rural Social Scheme (RSS).
 - The main types of works to be undertaken include vegetation clearance, water management, surface maintenance, litter clearance, landscaping and stile maintenance/repair.
- 3.24 The success of The Walks Scheme is that, as of July 2010, over 2,000 landowners had joined the scheme. The payment to landowners is between €390 and €2,900 per annum, with the average payment being €950. In return, the landowners are committing to completing maintenance and improvement works to the route, with €390 equating to around 27 hours and € 2,900 equating to around 200-hours of work respectively. Altogether, the overall cost of the scheme is close to €2 million per annum, securing just under 140,000 hours of improvement works on the routes.
- 3.25 This investment also supports other schemes and initiatives. This includes:
- Rural Recreation Officers who are responsible for preparing a trail management plan; co-ordinating trail maintenance between landowners and, where relevant, through the Rural Social Scheme; conducting trail inspections; protecting the natural and built heritage associated with the trail; and to liaise with local landowners through national agencies to facilitate greater co-operation.
 - Rural Social Scheme (RSS) with around 400 farmers directly employed in activities concerning the creation and maintenance of the walking routes. The RSS is a separate employment scheme that engages local farmers and fishermen.
- 3.26 However, the challenge for the scheme is that, as highlighted above, the maintenance payments were originally time limited to five-years. In the context of this study, payments are due to cease in 2013 for the Sheep's Head Way and 2014 for the Beara Way. At present, there is no clear indication that the payments and the scheme will continue beyond this timeframe, although it is understood the scheme is under review. Should the Walks Scheme not be extended or replaced, this could have profound implications for the future prospects of walking tourism in Ireland.
- 3.27 Of particular for the context of this study is that 515 (25.75% of the total) of the landowners involved in the walks scheme are located within West Cork, the majority of which are associated with the Beara Way (272 landowners¹²) and the Sheep's Head Way (243). The Walks Scheme funding, the RRO and the RSS are each administered through the WCDP.
- 3.28 Altogether, this means that there is currently a significant investment in the walking product of West Cork. It also denotes that West Cork has considerable exposure to any changes to the Walks Scheme. This will be explored further in section 5.

¹² As of 2011

Coillte Outdoor's

- 3.29 Coillte is Ireland's largest forestry and forest products company. The company owns and operates approximately 27,150 hectares of land in the District South 4 (S4), which comprises West Cork and South Kerry.
- 3.30 Coillte's principal commercial concerns relate to tree production and subsequent wood-based produce. However, more recently, the Group has diversified into other activities, especially those concerning natural environment, leisure and recreation. As such, Coillte has established access policies that seek to welcome visitors to its forests for the purpose of walking, cycling, horse riding, watersports and camping. This has subsequently led to the creation of the 'Coillte Outdoors' brand and website, a site dedicated towards encouraging visits. It is also worth noting that 15% of Coillte's estate is managed for biodiversity and are now active in allowing native woodlands to regenerate and prosper once more.
- 3.31 Coillte has identified that walking and hiking is the single biggest activity engaged in by forest users, with forest environments generally providing safe and attractive walking settings. It also recognises that its land can be utilised as either stand-alone routes or as part of a long distance route. Where long distance routes are being prepared that would include Coillte land, the organisation highlights the need to ensure that best international trail building and design criteria are used. This includes ensuring that the path material and construction are designed to accommodate the preferred markets.
- 3.32 Coillte are a critical partner in delivering access projects for leisure activities, especially walking with many of the National Looped Walks promoted by Fáilte Ireland using Coillte land.
- 3.33 There are eight Coillte Forest areas that are promoted in West Cork through Coillte Outdoors:
- Ballinspittle / Garrettstown
 - Carrigfadda
 - Castlefreke
 - Dromilihy
 - Farran Forest Park
 - Gougane Barra Forest Park
 - Pooleen
 - Rineen
- 3.34 The above includes two Forest Parks in Gougane Barra and Farran Forest which themselves contain a series of walks and trails.

Sli Na Slainte

- 3.35 Slí na Sláinte is an initiative developed by the Irish Heart Foundation designed to encourage and increase the number of people walking for both leisure and commuting within Ireland. The initiative has established a series of easy accessible routes that are

signposted using yellow signs on blue poles placed at one-kilometre intervals along each established walking route. The signs allow walkers to track the distance they have travelled. They are also designed as walks that have no designated start/stop points.

- 3.36 Trained walking leaders promote and lead walks in their area. They also organise the "Sli Challenge", a scheme designed to set people specific challenges and achievement rewards (i.e. 100km = Silver Sli Pin; 500km = Gold Sli Pin) as a means of ensuring regular participation in walking.
- 3.37 Slí na Sláinte has grown to include a network of almost one hundred and fifty walking routes around Ireland. There are six Sli Na Slainte routes in West Cork, namely:
- Bere Island
 - Glengarriff
 - Kilbrittain
 - Kinsale
 - Rosscarberry
 - Skibbereen.

Importance of Walking Tourism in Ireland

- 3.38 Amongst the rationale for developing of walking trails in Ireland is that, to compete internationally, Ireland needs to have a recognisable network of walking routes that can be promoted to the walking tourists both domestically and amongst its key international visitor markets.
- 3.39 The following provides an overview of the current position of walking tourism in Ireland in terms of its volume, value and characteristics.

Volume and Value of Walking Tourists in Ireland

International Walking Holidaymakers

- 3.40 The main data volume and value indicators concerning walking tourism are provided in Table 3.1. These figures specifically relate to visitors going hiking/cross-country walking in 2009.

Table 3.1			
Volume and Value of Overseas Visitors to Ireland			
	All Visitors	All Visitors Who Walk*	Walking Holiday Makers**
Total No. of Trips (millions)	7.22	0.830	0.366
Total Value (millions)	3879	494	215
Total No. of Nights (millions)	52.9		
Spend Per Trip	537.3	595.2	587.4
Average Duration	7.3		
Average Spend Per Night	73.3		
Source: Fáilte Ireland			
* Walking identified as an activity undertaken whilst in Ireland			
**Walking identified as the main purpose behind the visit			

- 3.41 As the table highlights, it was estimated that, in 2009, 830,000 holiday trips to Ireland involved some form of walking. This equates to well over 10% of all overseas visitors participating in some form of walk whilst staying in Ireland. Of this, around 366,000 trips (44%) could be classified as walking holidays – i.e. hiking/cross-country walking was the main motivation.
- 3.42 Walking holidaymakers generated €215 million for Ireland's economy (€587 per trip). As important in the context of this study is that this is a slightly higher spend level than the average (€537 per trip).
- 3.43 Recently released data on activities undertaken in by overseas visitors to Ireland 2010 indicates that 700,000 overseas visitors claim to have gone hiking/cross-country walking, more than a third of whom stated that walking was an important factor in their choice of Ireland as a holiday destination (245,000). This is a fall on 2009, albeit this is consistent with tourism to Ireland with overseas visitors falling from 6.56 million in 2009 to 5.87 million in 2010. It should be noted that all information is provisional at present.

Domestic Walking Holidaymakers

- 3.44 In 2009, domestic tourism trips in Ireland equated to 8.3 million trips that generated €1.4 billion in expenditure. Of this, just under half (4.0 million) were holiday trips and a further 2.7 million trips are to visit friends and relatives. Whilst holiday trips are more keenly associated with leisure activities such as walking, friendship groups in particular will also be predisposed to look at the 'things to do and see' in the local area.
- 3.45 Walking/hiking as an activity was undertaken by around 1 in 5 (21%) of domestic holidaymakers (840,000 trips), however the data does not segment this further into those who could be classified as walking holidaymakers.

Ireland's Walking Tourists - Key Market Characteristics

- 3.46 According to the Fáilte Ireland's Hiking and Hillwalking market research, the behaviours of overseas walking visitors to the country can be summarised as follows:
- the main walking markets are Britain (29%), USA (21%), France (11%) and Germany (11%);

- the average duration of stay of visitors participating in walking was 10.2 nights, much less than the overall average of 17.1 nights for all visitors;
- the majority (64%) of walking participants are on holiday, with a further quarter (24%) visiting friends and relatives;
- walking participants have a greater propensity to visit in the summer (54%) months than average (48%);
- walking participants from Mainland Europe and North America have a greater propensity to be on a first visit to Ireland (63% and 71% respectively) whilst those from Britain are more likely to be repeat visitors (69% repeat);
- walking participants have a slightly higher propensity to be aged 35-years and older (61%) compared to average (56%);
- walking participants are more likely to use a hire car (51%) compared to average (42%), with visitors from North America the most likely to use a hire car (62%). A third (32%) of this market do not use a car, which is significantly less than average (63%) suggesting that walkers tend to be more independent;
- walking participants have a much greater propensity to use serviced accommodation (53%) compared with the average (25%)¹³. This is being driven by visitors from North America (72%) and Mainland Europe (53%);
- walking participants from Britain, by comparison, have a much greater propensity to stay in rented (self catering) accommodation (32%);
- 85% of holidays by walking participants are arranged independently, however Mainland Europe (19%) and North America (15%);
- the vast majority of walks (92%) are unaccompanied by a guide; and
- 9 in every 10 (90%) of walking participants stated in the Visitor Attitudes Survey that they were satisfied with the quality of their trip, with over half (57%) extremely satisfied.

3.47 Research into the potential and perception of walking¹⁴ in Ireland generally accords with the above findings. All of the key markets (UK, France, Germany, Italy, Netherlands, USA) demonstrate a keenness for walking as a pursuit; have undertaken walking as an activity whilst on holiday; and will consider walking holidays in the future. In terms of market potential, these destinations alone represent market pool of over 12 million (see table 3.2).

¹³ Serviced accommodation includes hotels, B&B's, Guest Houses and Hostels

¹⁴ Undertaken as a sub-category of activity based holidays – Harris Interactive, 2007

Table 3.2						
Walking Demand by Key Markets						
	UK	France	Germany	Italy	Holland	USA
Undertake Walking in Own Country (%)	29	42	47	32	51	38
Have Taken Part in Walking on Holiday (%)	32	46	49	36	50	50
Consider Walking on Holiday in Future (%)	38	47	46	45	51	45
Estimated Size of Walking Market (000's)	3,436	1,329	2,611	693	1,322	2,974
<i>Source: Product Potential & Perception Research, Harris Interactive 2007</i>						

3.48 In addition, Ireland featured in the top countries that these markets would consider for walking (see table 3.3). However, a higher proportion in Mainland Europe would generally consider walking countries (Switzerland, Austria, Spain, Italy and France) and similarly those in USA consider UK, Italy and Canada in slightly higher esteem as walking destinations.

Table 3.3		
Countries Considered for Future Walking Holidays By Key Markets		
UK Residents	Mainland European Residents	USA Residents
UK (68%)	Austria (36%)	USA (78%)
Ireland (35%)	Switzerland (28%)	UK (55%)
France (33%)	Spain (24%)	Italy (54%)
Spain (30%)	Italy (22%)	Canada (53%)
Italy (28%)	France (21%)	Ireland (51%)
	Ireland (19%)	
	UK (16%)	
<i>Source: Product Potential & Perception Research, Harris Interactive 2007</i>		

3.49 In contrast, Ireland was the main overseas option of choice for residents residing in the UK (35%). It is unsurprising, therefore, to find the British market represented the main target market, especially in terms of the core segment of walking participants that would consider Ireland within the next 2 to 3 years.

3.50 Visitor satisfaction research on overseas holidaymakers to Ireland indicates over 90% of those who participated in some form of walking in Ireland are satisfied with their experience¹⁵. In addition, those visitors who engaged in hiking and walking in Ireland expressed higher levels of satisfaction with quality (76% satisfied) and price (71% satisfied)¹⁶ in their experience of Ireland. This information suggests that the high level of satisfaction with the walking product in Ireland is helping to engender more positive experiences of holidaying in the country overall.

¹⁵ Fáilte Ireland - Visitor Attitudes Survey All Holidaymaker Trends 2006-2010

¹⁶ Fáilte Ireland - Tourism Adventure and Activity Holidays Update

4 Walks in West Cork

- 4.1 There are many different types of walks within area, ranging from a 30 minute stroll to Castlefreke Lake that are graded as ‘easy’; through to the Beara Way which is a strenuous multi-day walk that reaches a highest peak of over 650 metres (Hungry Hill).
- 4.2 Each of these walks has a role to play in tourism terms. Arguably, gentle strolls, heritage trails in towns and villages and forest walks have greater usage than larger walks as they are likely to be viewed as one of the ‘attractions’ of visiting West Cork as a destination.
- 4.3 However, it has become apparent during the course of the investigation process that West Cork, and in particular the peninsulas of Beara, Sheep’s Head and (to a lesser extent) Mizzen each have the character and the capacity to drive visits specifically for the purpose of walking. Indeed, this is already happening on the ground.
- 4.4 In examining mechanisms to maximise the benefits of walking tourism to West Cork, it is felt appropriate to focus more specifically on trails that have the potential to form an integral part of a dedicated ‘walking destination’. It is for this reason that the following section will examine those walking trails that have the potential and capacity to be utilised to stimulate walking tourists, namely The Beara Way and the Sheep’s Head Way.

The Beara Way

Length: 206km

Grade: Strenuous

Time to complete: 9-days

Key Towns: Glengarriff – Castletownbere – Kenmare – Bere Island

Supporting Villages: Adrigole – Allihies – Eyries – Ardgroom – Tuosist – Lauragh

Route Origin

- 4.5 The Beara Way was established by a local tourism community group, Beara Tourism with the support of Fáilte Ireland, the Community Employment Scheme, the Rural Social Scheme and FÁS prior to the Walks Scheme. The group identified the need for a walking route to be established that would allow visitors to explore the Beara Peninsula sustainably whilst also recognising the role of tourism in providing a source in revenue for local businesses.
- 4.6 The success of the project is apparent in that it has led to the creation of an extensive walking route that covers 206km (approximately 80% of which is in West Cork, with the remainder being in South Kerry), largely over privately owned land that has been secured through the goodwill of the landowners. The initial investment was €100,000, although a further €300,000 was invested in 2006 in order to upgrade the route so that it is of a suitable standard for inclusion as a National Waymarked Way. This was part funded by Fáilte Ireland, Cork County Council, Kerry County Council, and Beara Tourism.

Usage

- 4.7 Counters have been used to estimate the number of walkers using the pathway. Table 4.1 summarises the number of counts recorded by average day between 15th April and 25th June 2011 at the Count B station.

Table 4.1 Beara Way Usage Counts Count B							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Average	186	142.7	144.5	181.2	116	149.5	240.9
Max	453	262	274	375	202	435	488
Min	50	31	58	50	5	4	36

- 4.8 The key findings of the counter readings are as follows:
- A total usage count covering the 72-day period was 11,864.
 - On average, highest usage appears to be on Sunday (240 count on average), with the lowest usage being on Friday (116 count on average).
 - The actual daily usage appears to range from 4 to 488.
- 4.9 Extrapolating the daily averages figure for the whole year suggests that the total number of walker using the path is around 60,000. However, the range (using the maximum and minimum figures) is from 12,000 to 130,000¹⁷. Accounting for limited use during winter periods and days of inclement weather, we believe that the actual number of walkers will be in the region of 40,000-55,000 walkers.

Brief Description

- 4.10 The Beara Way circumnavigates the Beara Peninsula, a rugged and largely mountainous area that is bounded by the Kenmare River to the North and Bantry Bay to the South.
- 4.11 The route offers a walking challenge, not least in the fact that it covers 206km, but it also contains significant ascents and descents, reaching heights of 500 metres, as it traverses the Caha and the Slieve Miskish Mountains.
- 4.12 The route also encompasses Bere Island and Dursey Island, both of which offer a unique walking experience in their right (see below). Bere Island is accessible via ferry transfer and Dursey Island via a cable car, although the timing of the cable car crossing can be variable. The Beara Way route on Bere Island is further subdivided into smaller sections that can be done as looped walks.
- 4.13 The significant majority of the Beara Way route uses off-road pathways, crossing predominantly private land, farmland, and commonages. However, according to the information provided by the NTO, approximately 92km of the route uses local roads, classified as Minor Roads.
- 4.14 For convenience, the route has been sub-divided into 15 sections that have their own map using more detailed mapping using as OS base. However, these can only be downloaded in their entirety from Beara Tourism's website (bearatourism.ie).

¹⁷ It is advised that count data be treated with caution due to the fact that there is limited qualitative observation to provide meaning to the counts themselves – i.e. weather conditions, special events, party size/composition, local versus 'tourist' use.

- 4.15 Several spur routes emanate from the trail including:
- a walk up Hungry Hill, an ascent to 685m to the summit of the hill which offers views over the surrounding peninsula, its coastal area, and across to Sheep's Head Peninsula to the south and the Kerry Peninsula to the north;
 - a walk up to the Cork Sugarloaf, a rise to 574m that provides a vantage over the Bantry Bay and the entrance to the Beara Peninsula;
- 4.16 There are also 14 looped walks on the Peninsula. Many of these have been developed under the National Looped Walks initiative, such as:
- Garnish Loop – 4km 'easy' trail at the western tip of the Beara Peninsula.
 - Creha Quay Loop – 6km 'easy' trail starting at Eyries Village and incorporating Coulagh Bay and Creha Quay.
 - Pullen Loop – 5km 'easy' trail that incorporates traditional farms abutting the rugged northern coastline of the Beara Peninsula.
 - Bullig Bay Loop – a 4km 'easy' trail that also incorporates the Dunboy Trail through a forested area.
- 4.17 Other looped walks have been developed to further expand the walking experience, specifically with a view to improving access and interpretation of the heritage of the area. This includes the Lonehart Heritage Trail, a trail that links the Lonehart Battery with the Beara Way; and the Allihies Mines Heritage Trail, a 10km route that incorporates the old mine buildings and the recently created Allihies Mine Heritage Centre.
- 4.18 The Beara Way trail is waymarked throughout, with boundary crossings and other barriers being made passable through metal, painted (green and yellow) stiles.

Trail Head

- 4.19 According to irishtrails.ie, the trail starts and ends at Glengarriff with the mapping generally reflecting this position. However, the route incorporates Kenmare and Castletownbere, both of which have concentrations of visitor accommodation (see below). Furthermore, there are other accommodation providers scattered around the peninsula, each of which is likely to support visitors keen on accessing the route. In this respect, each settlement represents a potential user 'gateway' to the trail. This is examined in more detail in section 5.
- 4.20 The smaller looped, heritage and spur routes generally have their own designated 'Trail Heads' which are identified on the maps and supporting information.

Strategic Route Integration

- 4.21 In addition to being a long distance trail in its own right, the southern and eastern sections (from Dursey Island to Glengarriff and Glengarriff to Kenmare) of the Beara Way forms part of the European Ramblers International Route E8. This route begins in Dublin and continues to Wexford and Waterford before reaching its final destination of the Beara Peninsula and Dursey Island.

- 4.22 For Ireland, this route represents the only designated route to span the country from east to west.

Other Key Assets and Attractions

- 4.23 The Beara Peninsula is also the subject of a cycle route (The Beara Way Cycle Route) and a driving tour (The Ring of Beara). These popular routes generally trace a similar navigational path to the Beara Way walking trail. Although the walking trail is separate, it does converge with some of the on-road sections of both the cycle route and the driving trail at certain points.
- 4.24 The purpose of each trail is to allow the visitor to explore the Peninsula, to appreciate its dramatic landscape, and to appreciate the views that are afforded here. In this respect, the attractiveness of the environment is a significant asset each. Nevertheless, as a means of improving the visitor experience, the trails also incorporate other attractions and features of interest such as:
- Garnish Island – accessible by boat from Glengarriff, the island is renowned for its ‘garden’ landscaping with Italian and Japanese influences. The Martello tower dating from the time of the Napoleonic Wars and The Inacullin tower provide other features of interest on the island.
 - Archaeological Sites – a series of archaeological sites can be found around the area, many of which are aligned with the Beara Way such as Ballynahowen Wedge Grave, Leitrim Standing Stones, Lenhanmore Ring Fort, Ardgroom Stone Circle, Uragh Standing Stone and Stone Circle.
 - Allihies Mines and Copper Mine Museum – a recently developed museum, café and information centre which offers an insight into the once important copper mining industry of the peninsula, with the Allihies Mining Heritage Trail starting at the museum and encompassing other associated heritage structures in the surrounding landscape.
 - Dunboy Woods – a public wood owned by Coillte that includes woodland walks, horse riding. The woodland is included in the Bullig Bay Loop.
 - Glengarriff Wood Nature Reserve – a 300ha site dominated by oak woodland which itself has a series of trails such as the River Walk (1km), Lady Bantry’s Lookout (1km), Big Meadow (3km), Esknamucky (2.8km) and Waterfall Walk (0.5km). Greater understanding of the wet, broad-leaved, semi-natural woodland, coniferous forest, peatlands and grassland habitats and wildlife they support are promoted.
 - Dursey Island Cable Car – a unique experience in its own right, the cable car links the western tip of the Beara Peninsula to Dursey Island.
 - Passaddhi Meditation Centre – this centre teaches meditation techniques and provides retreat experiences and spiritual holidays.
- 4.25 The area is also popular with sea fishing, both from land and through a charter boat from Castletownbere; and sailing.
- 4.26 Bere Island has a significant naval and military heritage, including the Lonehart battery, a former British Fort that overlooks Bantry Bay. The island also has a visitor centre that provides interpretation on the history of the island and the lives of its islanders.

Supporting Services

Accommodation

- 4.27 According to the audit of existing businesses, the Beara Peninsula is supported by following accommodation provision¹⁸:

Table 4.2		
Beara Way		
Estimated Accommodation		
	Establishments	Bedspaces
B&B	80	890
Hotel	9	830
Hostel	5	150
C&C	5	1265
Self Catering	160	850
Total	259	3985

- 4.28 Altogether, these accommodation providers combine to present nearly 4,000 bedspaces and an approximate capacity of just over 1 million bednights available in the area for visitors¹⁹. At an average of 4 nights per trip, this equates to just over 250,000 visitor trips per annum.
- 4.29 According to the accommodation survey²⁰, the average occupancy per accommodation bedspace is around 41%, suggesting that there are just over 100,000 visitors to this area. Operators indicate that just over a quarter (26%) of overnight visitors specifically visit the area for the purpose of walking. Of the remainder, half (50%) of visitors are believed to undertake some form of walk during their visit. As a result, it can be estimated that around 76,000 overnight trips to the Beara Peninsula are influenced by the availability of walking.

Catering

- 4.30 As expected, the main catering services are located within the centres of Castletownbere (11 restaurants, 7 bars and 1 night-club), Kenmare (11 restaurants, 7 bars and 1 cafe), and to a lesser extent Glengarriff (3 restaurants, 2 bars and 1 café). However, there are also pubs/bars located within some of the smaller villages such as Allihies (2 bars, 1 café), Eyeries (1 bar), and Ardgroom (1 bar).

Transport

- 4.31 There are 4 bus services to the Beara Peninsula:
- Bus Eireann: Cork – Glengarriff/Castletownbere – operates between four and five services (No. 236) per day to Glengarriff from Cork and vice versa. In addition, one/two of these services also continue on to Castletownbere on selected days (Monday, Tuesday, Thursday and Saturday). The journey to Glengarriff takes just over two hours with the connection to Castletownbere adding 50-minutes to the journey. On Sunday, the service reduces to two services to Glengarriff with one continuing to

¹⁸ See Appendix A for information sources. The database of accommodation enterprises can be found as Annex B.

¹⁹ Based on assumptions concerning bedspace availability for each type of accommodation type – see Appendix A

²⁰ Sample base for the Beara Way equals 14 which means that the finding should be treated as indicative only.

Castletownbere. A seasonal service (No. 252) between Killarney/Kenmare to Cork/Cork Airport also operates between 26th June and 27th August, stopping at Glengarriff.

- Bus Eireann: Killarney/Kenmare – Castletownbere – a seasonal service (26th June to 27th August) operates from Killarney/Kenmare to Castletownbere which also stops at five other stopping points on the Peninsula including Ardgroom and Eyeries. One service operates daily from Killarney and two services operate from Kenmare between Monday and Saturday. A service from Kenmare to Ardgroom operates only on a Friday throughout the rest of the year. There is no service available on these routes on Sunday.
 - Harringtons Bus - Harringtons runs a private bus between Cork and Castletownbere daily except Thursday.
 - O'Donoghues Bus – this private bus service operates between Cork and Castletownbere on Thursday only. A service between Castletownbere and Bantry operates on Monday, Tuesday, Friday and Saturday.
- 4.32 The above indicates some public transport services that could be used to support access to the area, however the level of Bus Eireann services from Cork to Glengarriff does not compare favourably with the level of services from Cork to Killarney (13-14 on weekdays and Saturday, and 12 on Sunday), for example.
- 4.33 Travel along the Peninsula is currently facilitated by the West Cork Rural Transport Service, but only on Tuesdays and Fridays. The route the services travels on is Castletownbere – Allihies – Dursey – Garnish (Tuesday – 2 services) and Adrigole – Castletownbere – Adrigole (Friday – 1 return service). Request stops along these can be made.
- 4.34 Baggage transfer services is organised locally by accommodation operators for walkers and is advertised for those seeking packaged tours, both guided and self-guided. However, the service for is only generally offered by the accommodation operators themselves and is not widely promoted. Tourists booking independently may not realise this service is available.

Information Provision

- 4.35 Information for visitors to the Beara Peninsula can be obtained through one of five Tourism Information Centres and Points in the immediate vicinity of the route – Glengarriff Tourist Information Centre (TIC), Kenmare TIC, Beara Tourism's Office in Castletownbere, Allihies Mine Centre and Bere Island Heritage Centre. The Tourist Information Centres in Bantry, Skibberrean and Clonakilty also have information on the Beara Way. This local information is also supported by regional signposting to the area by the Tourist Information Office at Cork.
- 4.36 The Glengarriff TIC is purportedly the main Tourism Information Centre for the Beara Peninsula, however the opening times for the centre are seasonal. The information available at Beara Tourism, Allihies Mine and Bere Island is alleged to be available year-round, essentially as a result of the provision being incorporated into other visitor services.
- 4.37 Beara Tourism has established a functional website (bearatourism.ie) that contains local business contact information, including accommodation, and maps on the walking, cycling

and driving tour available. A pocket guide booklet including routes maps using an Ordnance Survey base is available to purchase for €10.

- 4.38 The trail is promoted by discoverireland.ie (Fáilte Ireland) and irishtrails.ie (NTO/Irish Sports Council). However, the trail is not currently described on discoverireland.com (Tourism Ireland).

Future Development Priorities

- 4.39 Discussion with Beara Tourism has revealed that the group still has aspirations to develop the walking tourism product. The group is looking to action the following key projects subject to funding:
- re-route sections of the Beara Way off public road such as:
 - 3km between Eyeries and Ardgroom.
 - 6km between Ardgroom and Lauragh.
 - 3km between Lauragh and Tousist.
 - 3km in Bere Island.
 - 17km in the Kenmare-Bonane area.
 - 4km between Glengarriff and Kealkill.
 - develop additional coastal paths in Adrigole and develop Fáilte Ireland loops in Glengarriff, Kealkill, Allihies and Adrigole;
 - develop a horse riding trail in the Allihies Area;
 - creating a dedicated Marketing Officer position in the group to promote all activities;
 - open up the mines in Allihies to the public;
 - to refurbish the Lonehart Battery in Bere Island;
 - develop a marina and activity centre in Castletownbere;
 - promote Berehaven Harbour as a Cruise Liner location;
 - address the hotel situation in Castletownbere.
- 4.40 Although not entirely related to the walking tourism market (e.g. marina, hotel, cruise, activity centre), the relationship with walking tourism needs to be considered in these instances. For example, a marina, hotel and activity centre could each significantly increase visitor capacity to the peninsula, which in turn could be integrated into the walking tourism offer. This is especially pertinent for the hotel and the activity centre.
- 4.41 Similarly, should the depth of the water around Castletownbere be utilised for attracting cruise ships²¹, again there may be an opportunity to use this as a means of encouraging walkers to explore (albeit briefly) some of Beara Way.
- 4.42 However, the principal concern of Beara Tourism is in relation to the future of the Beara Way and its security through the Walks Scheme. The group feels that, should payment to landowners cease, the viability of the trail would also cease as the expectation is that some

²¹ A separate feasibility study being is being undertaken by Cork County Council to test this prospect

(possibly most) would withdraw their land from the route and remove stiles, gates and waymarking posts.

National Trail Office Observations

- 4.43 An annual inspection of all National Trails is conducted by the NTO to ensure that standards are being maintained. The inspection requires a minimum of 70% compliance with each of the seven criteria sets (Trail Information, The Route, Waymarking, Trail Surface, Vegetation and Litter, Furniture and Surface) for the trail to be considered as meeting the National Trail management standards.
- 4.44 For the Beara Way, this score was reached on three of the seven criteria sets (Information, Furniture and Surface). The following highlights the key findings from the 2010 Inspection Report for the Beara Way which led to this scoring:
- Trail information was at the required standard in relation to mapping, definitions and descriptions. However, the report highlighted that there is no information map or trail head board detailing the trail grades, distance, timing and other pertinent information at the start/finish points.
 - The route was generally passable along the majority of its length with the exception of two sections. The inspection also found a series of points where 'barbed wire' was visible and that there was a lack of warning signs at busy roads.
 - A lack of waymarking at junctions and waymarking alignment problems were highlighted throughout the route, although waymarked posts were marked well for being consistent in design, colouring and containing the National Trail standard imagery.
 - The condition of the trail surface was considered in many sections not to be up to standard with incidents of water logging, deep mud and severe erosion making the trail difficult to walk upon.
 - Although the furniture is suitably designed and installed, a couple of stiles and walking boards were considered a potential slip hazard.
- 4.45 As a result, the Beara Way is currently only 'Partially' Accredited'. The NTO, however, is keen to ensure that the Beara Way meets the minimum Management Standard requirement on all criteria sets, and indeed suggests that the trail has the potential to meet its International Standards in the near future. It recommends that this be achieved through devising a new management plan that is supported by key agencies that not only looks to progress the remedial actions as highlighted in the inspection report, but also delivers heightened experiences for walkers.

Review Summary

- 4.46 The review of The Beara Way demonstrates that it has the foundations to compete successfully with other national and indeed international walking routes. The combination of coastal and mountainous landscapes allows walkers to ascend some of the highest peaks in the region in Hungry Hill and Sugarloaf, which in turn afford stunning views over Bantry Bay and Kenmare Bay. The coastline and cliffs, too, provide attractive walking areas in their own right.
- 4.47 These assets alone are enough to appeal to walking tourists, especially those for those seeking a good challenge (e.g. Committed Wanderers and Part-Time Explorers) and those

seeking a challenging route but with the comfort of a guide. However, the availability of walks on the islands of Garnish, Dursey and Bere, each with their own unique character and appeal, represents a significant differentiator that can be used to encourage usage of the Beara Way over both national and international trails of a similar nature.

- 4.48 The looped walks and trails off the main Beara Way trail present opportunities for other types of walkers to engage in more moderate yet interesting walks – e.g. Amblers, Rambling Beginners and Part Time Wanders. Due to its inclusion in the E8 route, the Beara Way also forms part of the only ‘coast-to-coast’ trail in Ireland, offering walkers with a dramatic ‘finale’ to what would be, if undertaken in one go, a multi-week hiking challenge. All of these factors give support to the notion that the Beara Way is a route of potential international standing, a premise already suggested by the NTO.
- 4.49 The Beara Way is directly supported by three sizeable ‘gateways’ in Glengarriff, Castletownbere and Kenmare with the trail passing via each centre. The importance of these centres is reflected in the fact that they can be reached by public transport on a daily basis (albeit with more difficulty to Castletownbere) and that the majority of accommodation and catering provision are. In the case of Kenmare (Kenmare Bay Hotel, Park Hotel and Sheen Falls Lodge) and Glengarriff (Eccles Hotel), this includes two of the largest hotels within this area of West Cork.
- 4.50 The absence of a corresponding hotel in Castletownbere of a similar nature and (possibly) capacity is an observed gap in supply for tourism (not just walking tourism) for the Peninsula and one that has been reiterated through the consultation process. The development of Dunboy Castle would have resolved this issue, however the position of development is now unclear after construction ceased in late 2010. From the perspective of this study, It is arguable that the type of development (very high-end, luxury, exclusive retreat) would not generally be suited to the walking tourism markets.

The Sheep’s Head Western Trails

Length: 100km

Grade: Moderate

Time to complete: 4-days

Key Towns/Villages: Bantry – Durrus – Ahakista – Kilcrohane

Route Origin

- 4.51 The Sheep’s Head Way has been established by a Voluntary Committee, a group consisting of local businesses and community stakeholders, who are consistently seeking to improve the tourism offer of this remote and sparsely populated peninsula. The routes that now form the Sheep’s Head Western Trails have been developed since 1996, supported by local landowners who are now members of the Walks Scheme. The success of the project is evident in the fact that it has been awarded the Waterford Crystal Walker Award as the best walk in Ireland chosen by Country Walking Magazine, and was given the European Destination of Excellence (EDEN) Award by Fáilte Ireland in 2009.

Usage

- 4.52 Counters have been used to estimate the number of walkers using the pathway. Between 15th April and 13th July a counter was placed at Atha Thomais. Table 4.3 summarises the counts by day

Table 4.3 Sheep's Head Way Usage Counts Daily Total from Atha Thomais Counter							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Average	29	8.8	7.9	8.4	11	17.8	8.1
Max	372	34	19	24	47	72	22
Min	0	0	0	0	0	0	0

- 4.53 The key findings of the counter are as follows:
- A total usage count covering the 109-day period was 1,409.
 - On average, peak usage appears to be on Saturday (17.8 count on average), with the lowest usage being on Wednesday (7.9 count on average).
 - The daily usage appears to range from 0 to 372, although this only occurred on one day (29th March). The second highest count was 72.
 - Extrapolating the daily averages figure for the whole year suggests that the total number of walkers using the path is just over 4,700. However, using the daily maximum as a guide, this could reach up to 30,000.
- 4.54 Walker counts of the Sheep's Head Way from the period April 2009 to March 2010 indicate that the level of walkers using the route is over 22,000²².

Brief Description

- 4.55 The original pathway that is commonly referred to as the 'Sheep's Head Way' circumnavigates the Sheep's Head Peninsula. However, we refer to it here as the 'Western Trails', partly to denote the fact that a network of pathways now interlink with the northern and southern pathway creating a network of trails rather just the one; and partly because the Sheep's Head Way is also now being associated with pathways that head eastward from Bantry (see below)
- 4.56 The original circumnavigation trail travels west from Bantry on the northern (Bantry Bay) side of the peninsula to the end of the peninsula, marked by the lighthouse. The recognised return route uses the southern (Dunmanus Bay) side of the peninsula passing through Kilcrohane, Ahakista and Durrus.
- 4.57 The landscape of the Sheep's Head Peninsula is distinctly different from that of the Beara Way. Consisting of rugged cliffs, moorland and lowland terrain, it is less mountainous than the Beara Peninsula. As a result, it has a less imposing and has an almost tranquil ambience.
- 4.58 This is also reflected in the fact that the route has a 'moderate' rating in terms of its walking difficult (NTO). However, this does not mean that the route lacks any of the interest of its

²² It is advised that count data be treated with caution due to the fact that there is limited qualitative observation to provide meaning to the counts themselves – i.e. weather conditions, special events, party size/composition, local versus 'tourist' use.

neighbour as the central ridge still rises to 345m and affords expansive views of the surrounding landscape and of the Bantry Bay and across the Dunmanus Bay to the Mizen Peninsula.

- 4.59 The lighthouse at the end of the peninsula offers a clearly identifiable landmark and marker for the main trail that traces the natural line of the coast. However, the additional pathways that travel inland cross over the highest points such as the Caher (338m), Seefig (345m) and Rosskerrig Mountains (318m). Thus, the full extent of the Sheep's Head Western Trails is identified as a ridge and shoreline walk.
- 4.60 The additional pathways across the peninsula mean that walkers can create their own unique trail, be it circular or linear in nature. This allows walkers greater flexibility to identify a walk that accommodates their interests and their walking preferences. As with the Beara Way, the majority of the trail is off-road, crossing predominantly private land, farmland, and commonages. However, according to the information provided by the NTO, 28km of the route uses local roads, classified as Minor Roads.
- 4.61 For convenience, the route has been sub-divided into 8 sections that can be achieved in around half-a-day. The trail is waymarked throughout with wooden stiles providing a means of overcoming boundary walls and other barriers.
- 4.62 There are a series of looped walks that have been developed. The majority, though not all, have been designated National Looped Walks, including:
- Lighthouse Loop – 4km 'moderate-difficult' trail that takes users to the western tip of peninsula. Although a short route, the incidence of slippery and uneven pathway with loose rocks and poor footing are the reason for its difficulty. Access to the lighthouse is not permitted.
 - Poets Way Loop – 16km 'moderate-difficult' trail.
 - Peakeen Ridge Walk – 6km 'moderate' trail.
 - Mass Path – 2.2km 'moderate' trail.
 - Baran Loop – 9km 'moderate-difficult' trail.
 - Glanlough Loop – 20km 'hard' trail.
 - Seefin Loop – 13km 'hard' trail.

Trail Head

- 4.63 The principal Trail Head for the Sheep's Head Way is identified as the Wolfe Tone Square in Bantry. However, it is recognised that there are other access points, and thus users are invited to start and finish the walk anywhere they wish.

Strategic Route Integration

- 4.64 Although the original Sheep's Head Way was created as a long-distance circular route, it has been expanded to encompass pathways that stretches to the east beyond Bantry to Drimoleague where the route becomes segmented into different themed trails that comprise the Pilgrim Route and Drimoleague Heritage Trails (see below). From here, it is possible to connect with other trails in the area that eventually meet with E8 trail that leads into the Beara Way via Glengariff.

- 4.65 A cycle route (The Sheep's Head Way Cycle Route) generally traces a similar route to the walking route. The pathways are separate, except where the trails converge during on-road sections. The cycle route, which is 120km long, starts at Ballylickey and ends in Roaringwater Bay, near Ballydehob. The signposted route travels along the northern side of Sheep's Head Peninsula, and then returns via Durrus.

Other Key Assets and Attractions

- 4.66 Bantry contains the main visitor attractions within close proximity of the Sheep's Head Way Western Trails. As a small yet attractive market town, Bantry overlooks Bantry Bay that has gained a reputation for seafood, especially mussels and oysters.
- 4.67 Bantry House and Gardens, on the N71 to the south of Bantry, is one of the main attractions in West Cork. Revered as one of the finest historic estates in Ireland, Bantry House contains artefacts from around the globe including extensive collection of tapestries, paintings, and furniture amassed by the White family over the generations; a legacy of the White Family's travels over generations. The gardens also command one of the best views of Bantry Bay, particularly atop the 'stairway to the sky' found in the Italian Garden. The house and gardens have been open to the public since 1946.
- 4.68 There are few formal visitor attractions along the Sheep's Head Peninsula itself, with the Riverside, Kilravock, and Coiscuain Gardens being the main features of interests.
- 4.69 In addition to walking and cycling, there are few other formalised activities that can be undertaken on Sheep's Head Peninsula. This includes sailing, sea angling, kayaking and diving. Horse riding and pony trekking is also available nearby.
- 4.70 A trip to Whiddy Island can be undertaken. The island is sparsely populated but has on disused fort as its main feature of interest.
- 4.71 The Air India Memorial Garden, which was established to remember those who died in the 1985 the terrorist attack on the airline that resulted in the deaths of over 300 people. The Garden was established by Cork County Council and is visited by family, friends and those locally who remember the crash. An official commemoration is held at the site each year on the 23rd June.

Supporting Services

Accommodation

- 4.72 Table 4.4 shows the estimated accommodation establishments current supporting visitors to the Sheep's Head Peninsula.

Table 4.4 Sheep's Head Way Western Trails Estimated Accommodation		
	Establishments	Bedspaces
B&B	34	374
Hotel	4	500
Hostel	1	32
C&C	2	555
Self Catering	80	425
Total	121	1,886

- 4.73 Altogether, these accommodation providers combine to present over 1,890 bedspaces and an approximate capacity of 513,000 bednights available in the area for visitors²³. At an average of 4 nights per trip, this equates to a maximum of 128,250 visitor trips. With bedspace occupancy estimated at 41%, the number of overnight visitor trips received by the Sheep's Head Peninsula equates to around 54,000.
- 4.74 Despite this seemingly sizeable provision, it needs to be noted that the majority of this accommodation provision, especially serviced provision, is located in Bantry. Provision on the Sheep's Head Peninsula itself is much more limited, especially in relation to larger serviced accommodation. Rather, the accommodation on the Peninsula is characterised by small B&B's and a significant clustering of the self-catering stock.
- 4.75 According to the accommodation survey, just over half (50%) of overnight visitors to the area specifically visit the area for the purpose of walking. Of the remainder, over 90% of visitors are believed to undertake some form of walk during their visit. As a result, it can be estimated that 27,000 overnight visitor trips are directly attributable to the availability of walking routes in the area, whilst walking has been an integral experience of over 51,000 overnight visitor trips.

Catering

- 4.76 As the largest commercial and accommodation centre in the area, Bantry also has the main concentration of catering establishments (15 restaurants, 13 bars and 3 cafés).
- 4.77 Outside of this, Durrus is gaining a reputation for quality food, with 5 restaurants, 3 bars and 1 café within and close to the village. This is a significant cluster of provision given that Durrus is a relatively modest village. Similarly, Kilcrohane (2 restaurants and 4 bars) and Ahakista (2 bars and 1 café) contain a greater provision of catering provision than would normally be expected given the population base of the peninsula is reputed at 700.
- 4.78 The Sheep's Head café resides at the tip of the peninsula which is open daily to serve walkers, cyclists and general sightseers.

Transport

- 4.79 There are 2 principle bus services to Bantry:

²³ Based on assumptions concerning bedspace availability for each type of accommodation type – see Appendix A

- Bus Eireann: Cork to Bantry – operates between 5 and 6 services (No. 236) per day to Bantry from Cork and vice versa, including one service that stops at Cork Airport before continuing on to Glengarriff and Kenmare. The journey to Bantry takes just under two hours. On Sunday, the service reduces to 2 services.
 - Bus Eireann: Killarney/Kenmare to Bantry – this is a seasonal service (No. 252) that operates from Killarney and Kenmare to Bantry between 26th June and 27th August. This return service operates once daily Monday to Saturday.
- 4.80 It is possible to request a stop at Durrus Road and Durrus Cross, however none of the services appear to extend onto the Sheep's Head Peninsula itself.
- 4.81 As with the Beara Peninsula, travel along the Sheep's Head Peninsula is facilitated by the West Cork Rural Transport Service. However, this is only on Tuesdays and Thursdays, with the routes being Bantry – Kilcrohane – Durrus – Bantry. Two services operate on these days, one in the morning and the other in the afternoon. Stops at other points along the route can be requested.
- 4.82 Baggage transfer can be organised for walkers locally by accommodation operators and is advertised for those seeking packaged tours, both guided and self-guided. However, promotion of this service for tourists booking independently is generally reliant on local accommodation operators.

Information Provision

- 4.83 The main information for the Sheep's Head Peninsula is located at Bantry through the Bantry Tourist Information Centre. Other information can be obtained locally, with some of the local stores carrying some visitor information literature. A Sheep's Head Way Visitor Centre in Kilcrohane is advertised on the westcork.ie website. The café at the peninsula tip also contains local information and has 'branded' merchandise for sale.
- 4.84 The Sheep's Head Way Committee has established a website (thesheepsheadway.ie) that contains local business contact information, including accommodation and catering, a map and brief description of the trail. A guide book on the trail is available that includes an overview map and greater levels of interpretation on the fauna, flora, natural and physical heritage that can be explored. The booklet can be purchased for €8.
- 4.85 The trail is promoted through discoverireland.com (Tourism Ireland), discoverireland.ie (Fáilte Ireland), and irishtrails.ie (NTO/Irish Sports Council).

Future Development Priorities

- 4.86 Discussion with the Sheep's Head Committee has revealed that the group still has aspirations to improve the walking tourism offer on Sheep's Head. Among the types of projects that the committee believes would improve the offer on Sheep's Head include:
- reducing the stretches of pathway that utilise local (albeit quiet) roads;
 - encouraging new accommodation provision to accommodate independent point-to-point walkers in particular, with the committee identifying that the peninsula has a high number of 'spare' bedspace in farmhouses for example that could be utilised for walkers;

- encouraging new accommodation provision that can support walking groups, with interest from both domestic and international markets currently unfulfilled due to gaps in this provision at present;
 - increasing marketing and promotion which the committee regard as vital to increasing the numbers of walkers that use the pathways, both from domestic (especially Cork) and international markets; and
 - presenting the walk as an achievable challenge with the prospect of a ‘reward’ component for those who fully circumnavigate the Peninsula Path or travel along the full length of the path from east to west.
- 4.87 In addition to the above, a project that would create an outdoor activity centre at Ahakista has been identified that is currently seeking funding. Although the main focus of this centre is on watersports, it is predicted that many of its users will also be walkers on the Peninsula. If the centre were to include some form of accommodation, the additional capacity that this creates could be used to support walkers also.

National Trail Office Observations

- 4.88 The Sheep’s Head Way NTO inspection report denotes that five of the seven standards (Information, The Route, Vegetation and Litter, Furniture, and Surface) surpassed the 70% scoring requirement. The following highlights the key findings for the pathway that led to this scoring:
- The Trail Information available to users both during the route investigation and route usage stages was deemed to be of the highest standard overall, with the only issues concerning more detailed information at the Trail Head (e.g. trail grading definitions, trail length, description of waymarking signs and so on).
 - Only one problem with route obstruction was highlighted, with other concerns relating to protective tubing on electric fencing, warning signs near electric fencing and warning signs at a busy road crossing. However, these were not a level sufficient to produce a ‘below standard’ score.
 - A lack of waymarkings at junctions were highlighted along certain section of the route, however the positioning, visibility and consistency of the design and colouring were as required.
 - The condition of the trail surface was considered in some sections to be not up to standard with incidents of water logging, deep mud and severe erosion making the trail difficult to walk upon.
 - On the whole, vegetation obstacles, vegetation obscuring signposts and littering were considered were not observed to be an issue with the exception of a couple of sites.
 - The trail furniture, stiles and boards were considered to be suitably designed and installed.
- 4.89 As with the Beara Way, the NTO is keen to ensure that the Sheep’s Head Way addresses the remedial works as soon as possible to ensure that it meets each of the Management Standard requirements that will enable it to be a fully accredited National Trail. The NTO also believes that the Sheep’s Head Way represents a trail that could easily be progressed to International Standard, with the community involvement, good management structure and general ‘very good’ condition of the route being key advantages at this stage.

Review Summary

- 4.90 The Sheep's Head Western Trails are, collectively, an impressive network of walking trails within a highly attractive landscape, with the Sheep's Head Way being the flagship route.
- 4.91 The Sheep's Head Way was founded primarily as a multi-day walk that can be achieved in a relatively short period of time, meaning that it has much greater capacity to be undertaken within a 'short-break' visit (i.e. 4-days or less). However, its main advantage (and differentiator to the Beara Way) is the integration of other linked walks as extensions of the main pathway to create a useable 'network of trails' that traverse the peninsula. This network allows users the flexibility to develop their own routes to suit their needs, their interest, and their duration of stay. However, the Sheep's Head Way route remains as the 'named/branded' route that is used to promote walking on the Peninsula, including through discoverireland.com, Tourism Ireland's online resource for overseas visitors considering a visit to Ireland.
- 4.92 The landscape character of Sheep's Head Peninsula means that the pathways are, on balance, more accessible to a wider range of audiences when compared to the Beara Way. Its pathways are less of a challenge with gentler inclines, but the landscape is no less attractive and the views afforded by the peninsula ridge no less picturesque. Moreover, the differentiating factors means that the walking on the Sheep's Head Peninsula is complementary to the Beara Peninsula rather than being a competitor; with those deterred by the tougher challenge of the Beara Way likely to be more open to a walk in along the Sheep's Head Way; and conversely those that may deem the Sheep's Head Western Trails as being tame more likely to be persuaded by the tougher course offered by the Beara Way. This position is being reflected in the different difficulty ratings of the two walks as presented by the NTO.
- 4.93 The analysis of current business provision in the area suggests that there is reasonable accommodation stock and catering providers available to support walking tourists to the Sheep's Head Peninsula. However, this includes the sizeable provision in Bantry. Although this is a strength overall, a key issue is providing walkers not wishing to start in Bantry with public transportation to other potential start-points on the peninsula itself. A return at the end of the walks would prove equally problematic, even on the two-days that a service operates.
- 4.94 The mix of accommodation in the form of hotels, B&Bs and self-catering appears appropriate for the more mature audiences, families and friendship groups that the Sheep's Head Way is more likely to appeal to. One issue that does appear, however, is that the nature and spacing of accommodation and catering establishments means that those wishing to undertake point-to-point walking will find this more difficult to achieve.
- 4.95 This premise is reflected in the comments received by accommodation operators that highlight that they are often required by their guests to drop them off or pick them up from certain points along the walks. The operators are generally willing to do this, mainly because it secures bedspace occupancy for themselves; however for the dedicated walker trying to complete a point-to-point challenge this may not be viewed as a positive experience. As highlighted above, the Sheep's Head Committee believe that this could easily overcome through the use of existing farmhouses offering basic but functional overnight stops for this group.

- 4.96 It is clear from the investigation, consultation, and analysis that the Sheep's Head Way is fundamental to the tourism sector of the Sheep's Head Peninsula. In fact, it is evident that, without the walking route, there would be little in the way of physical amenity to support overnight visits to this area. It is also clear that the availability of the walking trail also supports accommodation and catering within Bantry, with respondents to the accommodation survey (9) suggesting that a high proportion (50% on average) of their business are walking holiday-makers. Whilst the sample is not fully reflective of the accommodation base in the town, this position indicates that Bantry is fulfilling a considerable role in supporting walkers to the area.
- 4.97 Other issues that have been raised on Sheep's Head concern transportation access; insurance; and marketing and promotion. These will be explored further below.

The Sheep's Head Eastern Trails

Length: 52.5km

Grade: Easy-Moderate

Time to complete: 2.5/3-days

Key Towns/Villages: Bantry – Drimoleague – Gougane Barra

Route Origin

- 4.98 The full extent of the Sheep's Head Way has been established by the Sheep's Head Committee, a voluntary group seeking to improve the tourism offer of this remote and sparsely populated peninsula.

Usage

- 4.99 Counters have been used to estimate the number of walkers using the pathway. Between 4th April and 7th July a counter was placed at Ahanafunson Bridge. Table 4.3 summarises the counts recorded by average day

Table 4.5							
Sheep's Head Way Usage Counts							
Daily Total from Drimoleague Counter							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Average	18.5	21.2	19.7	16.2	26.1	39.7	28.1
Max	37	57	53	41	81	101	104
Min	1	1	2	4	3	2	4

- 4.100 The key findings of the counter are as follows:
- A total usage count covering the 96-day period was 2,332.
 - On average, peak usage appears to be on Saturday (39.7 count on average), with the lowest usage being on Thursday (16.2 count on average).
 - The daily usage appears to range from 1 to 104 counts.
- 4.101 Extrapolating the daily averages figure for the whole year suggests that the total number of walkers using the path is just over 8,800. However, using the daily maximum as a guide, this could reach up to 25,000.

- 4.102 The official Sheep's Head Way travels east from Vaughan's Pass to the south of Bantry through Trawlebane and Glanatnaw before reaching Drimoleague. From here, the route then diverts northward to the village of Kealkill before finishing at Gougane Barra. Overall, the eastern section of the trail extends the full extent of the Sheep's Head Way to over 150km. However, as with the Western Trails, this area comprises other walks. To reflect this position, we have dubbed the walks in the area the Eastern Trails
- 4.103 The landscape character of this section of the route is generally attractive rural countryside with pleasantly rolling hills and valleys. The route is generally 'easy' to 'moderate' in terms of the challenge it presents, with some more difficult sections.
- 4.104 The main pathway has been sub-divided into a series of named sections that can be completed as linear walks. Starting at Vaughan's Pass in the west, the route comprises the following:
- Trawlebane Walk – a 7km section that takes users from Vaughan's Pass to the Glendarta Bridge.
 - Glanatnaw Walk – a further 7km from Glendarta Bridge to Moyne Bridge.
 - Glanbannoo Walk – a 5.5km trail that spurs off the Glanatnaw trail at Trawlebane Bridge to link Mealagh Way. This trail allows walkers to by-pass Drimoleague to head north quicker via Mealagh Walk.
 - Moyne Bridge Walk – a small 2.5km section that leads walkers from Moyne Bridge to Drimoleague.
 - Deeplish Cascades Walk – a 3km trail that can be taken from the northern most point of the Drimoleague Heritage Trail (see below), taking in a natural waterfall before reaching Castledonovan Bridge.
 - Glanaclohy Walk – a 9.5km trail from Castledonovan Bridge that has a loop element providing views of two lakes, Coomanore and Agower.
 - Mealagh Way – The Mealagh Way is a 12km route that links with Glanaclohy Walk to the south of the two lakes, continuing north to Kealkill.
 - Kealkill to Gougane Barra – a 14km strenuous pathway that extends north to the picturesque surroundings of Gougane Barra Forest Park.
- 4.105 The route north from Drimoleague to Gougane Barra (is also considered to be a Pilgrimage route with the end point, Gougane Barra, being the home the patron saint of Cork, St Finbarr (see below). This is actually promoted as a route on discoverireland.ie (Fáilte Ireland) as a newly revived walk that is 'set to become the "camino" [Camino del Santiago] of West Cork'. The walk is described as a 37km trek with an overnight stop in Kealkill, with the 25th September as the mark of St Finbarr's Saints Feast Day.
- 4.106 There are also a series of looped walks and shorter trails that can be taken
- Carriganass Walks – an 8km and a 10km looped walk starting at Carriganass Castle, Kealkill that takes in a Bronze Age Stone Row.
 - Drimoleague Heritage Loop – a 3.5km "National Loop" trail that takes users into the local countryside and hilltop to offer panoramic views of the area

- Shronacarton Walk – short (1.5km) linear stroll passing an old church, an old house in ruin, and an ancient holy well.

Trail Head

- 4.107 For those seeking the Sheep's Head Way Eastern Trail, the main Trail Head is likely to be Bantry with the access site being a car park at Vaughan's Pass. However, Drimoleague is also promoted as a trail access point, largely because walkers can use the town as a base to undertake the different walks in the area. It is for this reason that Drimoleague is being promoted as the 'walkers junction'.

Strategic Route Integration

- 4.108 As highlighted above, the Eastern Trail enables users to travel from Bantry through to Glengarriff via the E8 trail. This means that, in principle at least, walkers could start begin a walk at the Sheep's Head Lighthouse and end it on Dursey Island.

Other Key Assets and Attractions

- 4.109 At the Bantry end, the Sheep's Head Eastern Trail shares the same attractions and amenities as the Western Trails. Eastward beyond Bantry is served less well by other attractions and amenities designed to attract visitors. Rather, the walks and the attractiveness of the countryside are its main asset. However, this countryside includes heritage features such as historic tombs, stone circles and historic bridges.
- 4.110 Gougane Barra with its Forest Park, horse shoe-shaped mountain lake and surrounding mountains is the main attraction in the area. The countryside setting is described as being 'almost Alpine like'. Moreover, Gougane Barra is also famed with St Finbarr, the Patron Saint of Cork, who is widely believed to have lived as a hermit at Gougane Barra before founding the monastic settlement of An Corcach Mór that eventually became Cork City. St Finbarr also has links with Rome, and Barra in Scotland.
- 4.111 Gougane Barra Forest Park is owned and operated by Coillte. There are well-marked walks and nature trails through the forest, with the Gougane Barra Hotel providing the area's main accommodation and catering site.

Supporting Services

Accommodation

- 4.112 There is very limited accommodation supporting the Sheep's Head Way Eastern Trails beyond Bantry with just one serviced enterprise (B&B - Roselawn) located in Drimoleague and one to the north (hotel – Gougane Barra).
- 4.113 The accommodation provision is around 87 serviced bedspaces providing a capacity of 28,575 tourism bednights along this route. At four-nights per trip, this equates to 7,140 overnight visitor trips per annum.
- 4.114 Additional accommodation is available in Dunmanway. Although it is unlikely that the accommodation here could be utilised to support point-to-point walkers using the West Coast trails, the consultation process identified that the Dunmanway community is seeking

to establish its own walking product. Such a proposition could ultimately extend the remit of walking tourism to this area.

Catering

- 4.115 As with accommodation, visitors to the Eastern Trails are not supported by a wealth of catering services along its full length. Outside of Bantry, Drimoleague has four bars (Travellers Rest, Drimoleague Inn, Maydeane's, and McCarthy) and two restaurants (The Great View Restaurant, Café at the Mill) and Kealkill has one bar, whilst Gougane Barra is supported by the hotel and Cronins Bar and Café.

Transport

- 4.116 Drimoleague resides on the R586, a main road from Cork. Bus Eireann route 236 stops in the town four/five-times daily Monday to Saturday en route to Glengarriff.

Information Provision

- 4.117 Although the Sheep's Head Way extends eastward beyond Bantry, the sheepsheadway.ie website tends to focus more on the peninsula. However, the website describes walks from Carriganass Castle and these are highlighted as a means of connecting the Sheep's Head Way and the Beara Way.
- 4.118 A booklet containing detail on the Eastern Trails has been published with the title 'Drimoleague Heritage Walkways'. This is a useful pocket guide, which was produced by the Drimoleague Heritage Walkways Committee, contains a map and some interpretation on the key features of the walks as well as the routes themselves. However, with the exception of the Drimoleague Heritage Loop, none of the other trails (including the main Sheep's Head Trail path from Bantry to Drimoleague and Drimoleague to Gougane Barra) feature on irishtrails.ie. Moreover, these trails do not feature as part of the NTO's description of the Sheep's Head Way National Trail.

Future Development Priorities

- 4.119 Discussion with the Sheep's Head Committee confirmed that the Sheep's Head Way Eastern Trails are less well known and used by walkers at present. However, the Drimoleague Heritage Walkways (DHW) Committee is seeking to redress this position.
- 4.120 In particular, walking is regarded as a mechanism from which tourism interest in the village could be encouraged. As a result, the DHW Committee has set about establishing a series of local walks to increase the critical mass of provision, with the published guide booklet aimed at improving awareness, interest and understanding of the walks. The DHW Committee also developed the 'Walkers Junction' brand, which has been further supported this through the initiation of an annual walking festival, consisting of a series of guided walks over a weekend, as an extension of its annual village festival. Whilst past events have not yielded significant volumes of walkers on the day (approximately 20 on each walk), it is believed to have helped raise the profile and interest in walking in the area and is likely to continue to provide part of the village annual festival.
- 4.121 The lack of accommodation in the area is regarded as one of the key barriers to improving the value and visibility of the walks locally. In this respect, a project concept that would

realise a series of self-catering units, five tent/caravan pitches and, in the future, the possibility of a bunkhouse-type facility, has been prepared and could be developed subject to funding support. The overall concept could support between 25-30 walkers per night, with the main target audiences mature adults and older family groups. A current initiative that is being instigated by the same project initiator is the development of a coherent walkers service package that includes the organisation of other local accommodation and transportation services (i.e. airport pick-up, walk pick-up and drop off, baggage transfer).

Review Summary

- 4.122 The Sheep's Head Way Eastern Trails are the least well known and the least used of the main trails available. This position is not assisted by the fact that the trails are not featured on irishtrails.net nor discoverireland.com, two of the three main source of information on Ireland's walking routes available to visitors.

- 4.123 The trails are loosely mentioned on sheepsheadway.ie, but they are not currently described as being part of the Sheep's Head Way. From a purely branding perspective, therefore, these trails are not being co-ordinated with the Sheep's Head Way effectively nor are they being promoted under their branding of the Drimoleague Heritage Walkways. This is a somewhat confusing position in that it is difficult to determine which trails are meant to form part of the Sheep's Head Way (if any) and which stand-alone. Likewise, the fact that the trails between Drimoleague and Gougane Barra appear as the St Finbarr's Pilgrimage Trail further adds to this confused picture.

- 4.124 The lack of confidence in presenting a long-distance trail here could stem from the limited supporting amenities for any long distance walkers, with current initiatives to encourage walking tourists hindered by this factor. Yet, this position belies the potentially strategic importance of the walking provision in this area. Firstly, the route has the capacity to provide an extension to the Sheep's Head Way that could encourage long stays in the area and return visits; secondly, as described by the Sheep's Head Way Committee, it presents a link between the Sheep's Head Peninsula and the Beara Way Peninsula that could be presented as a long distance trail in its own right; and thirdly, the St Finbarr's Pilgrimage Route could certainly have resonance with Cork County's residents and beyond.

- 4.125 In this respect, there is a need to consider how best to utilise and present these interconnected routes to ensure that these strengths of the route are being brought to the fore. New accommodation provision, as presented above, would certainly be a critical step in this process. It is also encouraging that the project initiator has identified the need to create a coherent package for walkers that includes transportation and connections as well as simply accommodation. However, these initiatives need to be supported by other development options and opportunities, potentially including new accommodation provision in or close to Gougane Barra as an attraction in its own right and also a link to the Beara Way.

5 Issues and Challenges

- 5.1 The previous section details the principal walks in West Cork that, at present, have the capacity to encourage walking holidays to be taken in the area. The following examines the key issues, opportunities and challenges facing these routes which have been identified through the consultation process. Solutions to these issues will be examined in the subsequent stage of the investigation process, which in turn will provide the development framework for walking tourism.
- 5.2 To reiterate, the following focuses on the trails outlined in section 4 – the Beara Way, the Sheep’s Head Western and Eastern Trails. When viewed from both a landscape and tourism perspective, we believe that this area of West Cork has a unique character that is distinct from elsewhere in the West Cork area, not least because of its series of peninsulas and inhabited islands. As such, we feel that it is appropriate to define this area as **‘West Cork’s West Coast’** as a means of more succinctly articulating our area of focus from this point forward.

Securing Walking Trails in Ireland

- 5.3 One of the critical issues and challenges facing the longevity of walking tourism, not just in West Cork, but across all of Ireland is the continuation, in one form or another, of the Walks Scheme.
- 5.4 As described in section 3, 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. For example, the development of the Beara Way and the Sheep’s Head Way and associated Looped Walks have only been achieved through the co-operation of landowners, with the incentive of the payments available through the Walks Scheme regarded as a means of facilitating this co-operation (see section 3)
- 5.5 However, the contracts that have secured the routes are due to cease in 2013/2014, which could result in the current payment being received by landowners being either lessened or lost altogether. In order to better understand the implications of this, a meeting with several landowners from both the Beara Way and the Sheep’s Head Way was held. Discussion concerned the value of the monies received under the Walks Scheme versus the imposition of the public walking through their land and the maintenance requirements for the upkeep of the pathway.
- 5.6 Although the discussion cannot be considered statistically representative, the key message from the meeting was that allowing public access is an inconvenience for some, if not many, of the landowners, and that this inconvenience is only eased through the payments they receive for the agreed maintenance works. Incidents of littering, open gates, and even illegal camping are not uncommon; each of which has to be rectified by the landowner. As a result, the payment landowners receive, which is relatively modest in their eyes, is generally considered recognition of their co-operation in providing access and the inconvenience of resolving the issues that walkers on their land create. Interestingly, it is less associated with being remuneration for any time and materials they use for maintaining the pathway, although this is what the fund ultimately achieves.

- 5.7 The landowners also regard themselves as having a key role to play 'looking after' the walkers. This has included assistance if they lose their way and need directions; use of their telephone if they miss-judge the length of time the walk takes and need to call their B&B or taxi (hackney); and even sometimes providing use of their toilet. The discussion group believe that 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. The intimation was that 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.
- 5.8 The sentiment that the loss of payment under the Walks Scheme would result in all landowners withdrawing access to their section of the pathway was by no means unanimous. However, even the prospect of 5% removing access permission would have a dramatic impact on the overall route. At these points, the pathway would need to be diverted if the trail is to remain but the only resolution would be to either to negotiate with a new landowner, but without the prospect of funding that could be used as leverage; or to divert the route onto local roads. However, as highlighted by the NTO report, many of the National Trails suffer from having too high a percentage of the trail on roads. As a result, the NTO recommendation is to address this position rather than exacerbate it.
- 5.9 With the Walks Scheme due to cease around 2013/2014, a nationally-led resolution will be found if the long term future of the existing trails is to be secured, a position that both Fáilte Ireland and the NTO are acutely aware. Moreover, whilst the Walks Scheme has proved useful, it is not in itself a solution that is allowing Ireland to match the countryside access of neighbouring (and competing) countries whose visitors have a greater access rights afforded by the varying 'Rights of Access' and 'Rights to Roam' legislation and acts.
- 5.10 In this respect, the Walks Scheme remains just one component of a larger issue for Ireland that needs to be resolved. 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.

Transportation and Access

- 5.11 Access to a destination is vital to its success, especially for places that have a peripheral location such as West Cork's West Coast, irrespective of the market/s being pursued. However, walkers bring an added dimension in that walking holidaymakers are slightly more likely to be independent travellers (85%), yet a high proportion (32%) still do not use a car. With walking also regarded as being increasingly associated with 'green' travel and eco-tourism, this situation could well increase.
- 5.12 Access to West Cork and its West Coast, therefore, needs to be considered against this position.

International Access

- 5.13 From an international perspective, West Cork is actually served well by through its association with Cork's international ports:

- Cork International Airport that services 30 airlines and 60 short haul routes across Western Europe including cities and destinations in England, Scotland, Wales, Spain, France, Germany, Italy, Netherlands, and Poland. The airport managed some 2.43 million passengers in 2010, with the busiest routes being London (30%), Amsterdam (6%) and Malaga (4%).
 - Port of Cork which has roll-on-roll-off services from Swansea, Wales (3 per week) and Rosscoff, France (1 per week) – these services have only recently begun operating (March 2010) and thus no data has been produced on the passenger numbers, however the Swansea-Cork ferry has a capacity of 1,800 passengers and 400 cars.
- 5.14 West Cork's West Coast is also served by Kerry Airport that has five principal flight destinations in London Stansted, London Heathrow, London Luton, Frankfurt Hahn, and Manchester. This the airport catered for just under 400,000 passengers in 2010.
- 5.15 Taking the average ratio for international arrivals to Ireland against visits abroad by Irish Residents (52/48) it can be estimated that these gateways support over 1.6 million international passengers per annum. In the past, this has been higher (close to 2 million), with Cork International Airport passenger numbers reaching 3.25 million in 2007.
- 5.16 These gateways, therefore, represent a considerable strength in relation to international access for West Cork. In particular, the association of Cork's airport and port with the British market means that West Cork has direct access to a mature, experienced and sizeable walking market.
- 5.17 However, it should be remembered that Cork City is a popular city destination – featured as one of the top 10 cities of the world to visit in the Lonely Planet's travel guide for 2010 - that is increasingly targeting short breaks. As a result, the City may well be the principal destination for many of these arrivals. The challenge for West Cork is to utilise the access platform that the gateways present to showcase the virtues of either extending their trip into West Cork or encouraging a return visit. Presenting its West Coast, its peninsulas and islands as a destination for walking would certainly be one way of achieving this (see below).

Access to West Cork's West Coast

- 5.18 West Cork is regarded as a peripheral destination within Ireland; West Cork's West Coast even more so.
- 5.19 The travel time to Bantry is just under 5.5-hours drive from Belfast, 4-hours from Dublin, 2.5-hours from Limerick, and 1.5-hours from Cork. This means that the West Coast is on the limit of what would be considered a 'day trip' destination by its nearest population centre, Cork. It is also on the limit of what would be considered a 'weekend break' destination from Ireland's and Northern Ireland's main population centres of Dublin and Belfast respectively. In comparison, Fort William is a 3-hour drive of Edinburgh and 2.5 hours from Glasgow. These drive-times are much more reasonable for walking enthusiasts seeking a short/weekend break.
- 5.20 This problem is also apparent for international visitors who, after reaching Cork or Kerry, face another journey of between 1 and 1.5-hours to reach the West Coast. Car-travellers using the ferry will generally not regard this as an issue, however those arriving as ferry

foot passengers or by air will need to be confident that connecting travel arrangements can be easily made.

- 5.21 Tour operators certainly have a role to play in this regard, with the ability to access packaged walking tours that include transfers providing a much more straight-forward solution for visitors. However, as Fáilte Ireland research highlights, the majority of walking trips are made independently (85%) which means that other forms of transport are required. For over half of these, hire car are the preferred means; for nearly a third they will need to utilise public transport.

- 5.22 A hire car is an acceptable choice for many holiday-makers as it allows greatest flexibility. However, it represents a significant additional cost for holidays with a cost of between €25 and €80 per day (depending upon car size). It is therefore more likely that, in order to justify the value of the hire car, any walking holidaymakers would mix walking with other forms of sightseeing. These are also more likely to be centre-based walkers with point-to-point walkers probably not regarding this option as good value for money.

- 5.23 Public transport represents a more cost-effective means of travel for point-to-point walkers. In this respect, the review did highlight that bus travel via Bus Eireann to Bantry and Glengarriff was possible several times per day, however on all but one occasion this journey would need to start in Cork City rather than the airport. It is also more difficult to reach Castletownbere and Durrus via public transport, both of which have the capacity to provide hubs and gateways for walkers (see below).

- 5.24 These transport issues are sufficient to present a potential barrier to any visitors to West Cork, but this position is likely to be more acute for walking holidaymakers. To overcome this, walking holidaymakers will need to be convinced that the experience they will receive is sufficient to warrant the time, expense or inconvenience of travelling to the West Coast.

Transport Services Supporting Walking Routes

- 5.25 The main support for people travelling to the West Coast to undertake a walk is through car park provision. Both Sheep's Head Peninsula and the Beara Peninsula are served reasonably well by car parks, although some comments from the consultation process suggest that capacity could be increased.

- 5.26 Increasing car park provision in countryside areas should always be carefully considered, with the danger being that these sites detract from the overall landscape character if they are too large or not well-screened. Encouraging car movements locally can also create problems of localised traffic congestion and, in the case of some of the minor roads, increased safety risks. The potential value of walking, therefore, is that the exploration of destination should result in a removal of tourism traffic from the roads. This can only be achieved, however, when car parks are kept to a minimum and access to the trail is possible directly from the accommodation provider or via a regular public transport system to take people from their accommodation to various points along the walk and vice versa.

- 5.27 The current provision of local transports is currently a significant weakness and barrier to reducing reliance on car travel locally. It is also preventing greater linkages between the principal towns and villages that could actually be used to better package short-break point-to-point walking. For example, walkers seeking a short-break, weekend trip between Glengarriff and Castletownbere stopping overnight at Adrigole would not be able get back to their start point using public transport and rather would need to use more expensive taxi

services. In addition, those staying Bantry but wishing start a walk from Kilcrohane would only be able to achieve this on Tuesday's or Thursday's.

5.28 This type of issue is not uncommon and can be difficult to resolve, especially in isolated rural communities due to the overall size of the market from both the local population and indeed overnight tourists. However, there are some examples of whereby solutions have been found:

- New Forest National Park, England - an open top bus tour and free cycle trailer runs between June and September annually that connects the forest's off road cycle and walks network as well its other attractions and places of interest. Price – £10 for 1-day pass up to £20 for a 5-day pass.
- Norfolk Coasthopper Bus Service – the Norfolk Coasthopper shadows the Norfolk Coast Path National Trail from Hunstanton to Cromer, meaning that the walking route can be accessed from any of the stops along the bus route. An example 'itinerary' is provided:
 - 0900 Leave Wells Quay.
 - Follow the Norfolk Coast Path to Burnham Overy Staithe
 - 1200 Arrive at The Hero pub for a much needed lunch
 - Catch the Coasthopper back to Wells Quay at 1335.
- Hadrian's Wall Bus AD122 – This bus route was primarily established to provide an easy and sustainable way to travel to different points along Hadrian's Wall, but it also links well with the Hadrian's Wall walking and cycle routes allowing users to start and end along different sections of the trails.

Walk Condition

5.29 As National Trails, the Beara Way and the Sheep's Head Way (Western Trail) are both inspected on an annual basis to ensure that they attain the basic Trail Management Standards expected. A summary of the 2010 review highlights that neither trail currently satisfies each of the full criteria requirements to 70% in order to attain full accreditation.

5.30 Pathway maintenance, particularly removing barriers and obstacles that may dramatically hinder progress, is vital for the success of any trail. Similarly, the pathways need to be visible, clearly signposted and be secure under foot. However, the character of the trail also needs to be in keeping with the character of the natural environment. In this respect, the environmental character of the Beara Peninsula is such that walkers will generally expect certain challenging conditions and natural hazards (including water logged fields, large rocks, etc). As long as this is acknowledged through pre-trip information sources, walkers should also arrive adequately prepared (e.g. clothing, boots).

5.31 In this respect, it is essential that the walks do not become overly manicured or sanitised in order to make them easier to complete or to broaden their appeal further. These are long distance walks that traverse natural, rugged, and often wild landscapes. This is their appeal and their differentiating factor compared to easy walks designed to accommodate ambulators. To over-sanitise such routes by 'smoothing out the rough edges' would ultimately detract from the overall walking experience amongst the identified walking markets.

- 5.32 Rather, it is our view that it is more important to ensure that, after experiencing these conditions, walkers have the ability to recuperate through dedicated provision that will enable them get warm, get clean, dry their clothes and boots, and have a hearty meal and drink. This is more likely to be the expectation of these types of trail.
- 5.33 The premise of ensuring the trail is in keeping with the environment should extend to the style and material of the furniture used such as the stiles, waymarking signs, and so on. In this respect, it is our view that the metal stiles used on the Beara Way are not in keeping with the landscape as they are not of a naturally occurring material. Moreover, according to the NTO audit, these stiles are not serving users any better than the wooden stiles that are being used on The Sheep's Head Way. We accept that the metal structure of the stiles will last longer and have lower maintenance cost, but this is ultimately compromising the overall countryside setting. Ideally, this should be reversed over time to improve the overall look of the trail as it passes through the countryside.
- 5.34 As identified by the NTO, these trails need to be supported by a management plan that will lead to greater co-ordination of remedial works identified for the trails. It will also provide a formal means through which the local management organisations can engage with funding bodies. Although these bodies are aware of the maintenance and improvement needs, this is not being presented in a manner that demonstrates consensus agreement, priorities for action, and associated funding needs.

Supporting Amenities and Services

Accommodation Stock

- 5.35 The current accommodation provision supporting the trails is summarised in the following table (see Figure 1):

Table 5.1				
Estimated Accommodation Stock Associated with the Walking Trails in West Cork's West Coast				
	Beara Way	Sheep's Head Way West	Sheep's Head Way West	Total
B&B Establishments	80	34	2	116
<i>B&B Bedspaces</i>	<i>890</i>	<i>374</i>	<i>22</i>	<i>1286</i>
Hotel Establishments	9	4	1	14
<i>Hotel Bedspaces</i>	<i>830</i>	<i>500</i>	<i>55</i>	<i>1385</i>
Hostel Establishments	5	1	0	6
<i>Hostel Bedspaces</i>	<i>150</i>	<i>32</i>	<i>0</i>	<i>182</i>
C&C Establishments	5	2	0	7
<i>C&C Bedspaces</i>	<i>1265</i>	<i>555</i>	<i>0</i>	<i>1820</i>
Self Catering Units	160	80	2	242
<i>Self Catering Bedspaces</i>	<i>850</i>	<i>425</i>	<i>10</i>	<i>1285</i>
Total Establishments	259	121	5	385
Total Bedspaces	3985	1886	87	5958

- 5.36 Using this stock data, it is possible to estimate the number of bednights and how this could translate into walking trips (see Appendix A):

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- Sheep's Head Way Eastern Trails – 28,575 bednights, which, at an average duration of 4 nights per trip, equates to some 7,150 visits per annum.
- 5.37 Altogether, we estimate that this bedspace capacity represents approximately one-third of the provision in West Cork. Although this stock provision appears reasonable given the size of each of the towns and villages associated with the routes, when translated into trip capacity it can be seen that accommodation is a limiting factor in maximising the opportunity presented by the attractiveness of the landscape in relation to tourism.
- 5.38 There appears to be a good mix of accommodation stock, perhaps with the exception of camping and caravanning establishments which, given the rural landscape, is somewhat lower than expected. The prevailing weather conditions could be a contributing factor here, however from the perspective of this study (and the activities market in general) good quality camping and caravanning provision can present a cost effective accommodation option for the visitor. For the destination, these types of establishment represent a means of supporting large levels of visitors, albeit on a seasonal basis.
- 5.39 Another accommodation type that has a strong association with the walking market, particularly younger audiences, are hostels and bunkhouses. The accommodation audit has highlighted hostels on the Beara Way (Hungry Hill Lodge, Adrigole; Lawrence Cove Lodge, Bere Island; Murphys Hostel, Glengarriff; Failte Hostel, Kenmare) and the Sheep's Head Way (Allihies Hostel, Allihies). Although reference is drawn to the walking opportunities available in the area, they do not appear to explicitly geared towards walkers and rather have a more generic target. In comparison, the hostels in and around Fort William associate themselves much more directly with walking and outdoor activities.
- 5.40 It is also apparent that there are no bunkhouses available with any of the walks. If the aim is to position West Cork's West Coast as a serious outdoor and walking destination, this would appear to be a significant gap in provision.

Accommodation Distribution

- 5.41 Walking tourism destinations need to be able to cater for both point-to-point walkers and those seeking a central base from which to access different trails/trail sections.

Accommodation for Point-to-Point Walkers

- 5.42 The spatial assessment of accommodation along the walks demonstrates that there are gaps in existing provision for those seeking to complete the routes point-to-point. For instance:
- Beara Way – there is limited accommodation provision at the eastern point and along the northern section of the route, especially between Glengarriff and Castletownbere and Ardgroom and Kenmare. Although there is some provision between these sections, this may not be sufficient to accommodate sizeable numbers.
 - The Sheep's Head Way Western Trail – the main bulk of serviced accommodation provision lies along the southern part of the trail. Although there is some serviced provision in along the northern section, this in itself is limited in terms of capacity.

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- The Sheep's Head Way Eastern Trail(s) – there is very limited accommodation supporting this route outside of Bantry with just one hotel (Gougane Barra) and one B&B (Drimoleague) available to walkers.
- 5.43 The issue of accommodation supporting point-to-point walkers is reinforced by the fact that walking tour operators arranging self-guided and tour-guided walking holidays stipulate the need for collections and transfers between specific points. For example, an eight-day holiday programme on the Beara Peninsula requires a return transfer to Glengarriff for a night after walking to Adrigole; and a five-day programme of the Sheep's Head Way requires two-nights in Kilcrohane with walkers being transferred back to the village after walking Cahergal. Whilst the collections and transfers are included in these tours, this is still a less than ideal option for the walker who is seeking to complete a point-to-point walking challenge.
- 5.44 For independent walkers, this situation will present greater complications. They will need to rely on the co-operation of accommodation operators to undertake the transfers; pre-arrange a local hackney/taxi service; or will look to public transport to aid their movement. In some instances, they may also decide to create their own solution through outdoor/bivouac style camping, which in many cases cause conflict with the landowners. Ideally, these gaps need to be addressed with suitable accommodation provision at key walking intervals (around 15-20km apart) to address these issues and ultimately to provide a more rewarding experience for the visitor.
- 5.45 The type of accommodation at these points needs to be complementary to the type of route and the likely walking users. It is our view that the accommodation provision should be able to cater for large groups – between 15-30 people per night – in order to support both individuals and walking tours; in other words hostels and bunkhouses/barns. Some provision for official camping would also be beneficial here. The accommodation needs to be clean, comfortable with toilets, showers, driers, and a kitchen. However, the market will expect it to be relatively basic and functional, particularly on challenging walks (i.e. The Beara Way).
- 5.46 Fáilte Ireland is currently in the process of establishing specifications for bunkhouse accommodation in order to allow this type of provision to be included in its 'official' accommodation classifications. In the interim, the following presents some of the general guidelines currently being used by VisitScotland:
- Bunkhouse Definition: Rural accommodation which can be booked by groups or individuals. Services and facilities may be limited but will include a self-catering facility. Bunkhouses are not star rated but will meet or exceed minimum standards for cleanliness, maintenance and quality.
 - All sleeping provision must be in beds, bunks or alpine platforms (with a mattress) and must be a minimum size of 6' x 2'6" or equivalent per person in respect of platforms.
 - All sleeping areas to have at least one external window supplying ventilation & natural light.
 - A kitchen with refrigeration and cooking facilities to be provided, with a minimum of 4 cooking rings for the first 32-bedspaces with a further cooking ring to be provided for every additional 8-bedspaces thereafter.

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- Hot and cold running water with a ratio of one shower, WC and washbasin per every 20-bedspaces.
- 5.47 VisitScotland also support the provision of a camping barn/bod/bothy, which is even more basic in terms of style and provision stipulations.
- 5.48 It is possible that for more gentle walks (e.g. Sheep's Head Western and Eastern Trails), which have different market connotations, that other forms of accommodation could be used. The potential of 'Glamping' provision has been mentioned as part of the discussion for walking. Whilst there is always an association between any form of camping and walking, it is arguable that Glamping is more suited to centrally-based walkers and family groups. The other option highlighted by the Sheep's Head Committee is to allow local residents to open up any spare bedspaces to accommodate walkers using the trail. Whilst this would certainly increase stock and provide residents with additional income, the availability and quality of service would be difficult to regulate.
- 5.49 In these instances, we believe that a hostel would be more appropriate for point-to-point walkers, however the capacity created would need to be carefully evaluated if it is to be used as a stand-alone facility. An alternative would be to broaden the market focus of the accommodation provision to include all types of activity. An example of this is the proposed 'outdoor activity centre' at Ahakista. Although this does not include accommodation at present, we would recommend that this be reconsidered on the basis that it could have this dual-purpose. The facility need not be a permanent structure and could potentially use temporary accommodation (such as a large-scale marquee that has bunkbeds plus space for other camping types) in order to test the market strength before committing to a more permanent structure. In this respect, whilst its main target would be residential-and non-residential outdoor activity groups and enthusiasts, any spare capacity could be sold to walkers seeking accommodation.
- 5.50 In addition to this, the consultation process has identified that it may be possible to encourage some of the existing providers, especially along the northern route, to expand their services to include basic bunkhouse provision. A key barrier to this has been the lack of guidance provided by Fáilte Ireland, however this will be resolved in the near future.

Accommodation for Centre-based Walkers

- 5.51 The accommodation review denotes that Kenmare has the largest concentration of accommodation enterprises, although there is a good level of accommodation provision in Bantry, Glengarriff, and Castletownbere (see table 5.2).

Table 5.2						
Number of Accommodation Establishments by Key Town/Village						
	Bed and Breakfast	Caravan And Camping	Hostel	Hotel	Self Catering	Grand Total
Kenmare	42		1	6	27	76
Bantry	18			3	14	35
Glengarriff	7	3	1	3	9	23
Castletownbere	8	1			10	19
Kilcrohane	5		1		11	17
Durrus	4	1			8	13

Allihies	3		1		6	10
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- 5.52 It should be noted, however, that the accommodation provision in Kenmare is not only associated with the Beara Peninsula, but is perhaps more aligned to the Ring of Kerry which is a very popular driving trail. It is also a gateway to Killarney as one of Ireland's most popular National Parks. Nevertheless, this observation at least demonstrates the importance of Kenmare as an accommodation hub and gateway to West Cork.
- 5.53 Accommodation provision in Durrus and Kilcrohane is also strong given the size of these centres. However, at present none of these centres have evolved into a clearly defined 'walking hub'.
- 5.54 Discussion with Failte Ireland has identified that they are currently piloting a programme that could be utilised by these centres in order to promote their credentials as gateways and hubs for those interested in walking; namely the 'Walkers Welcome' scheme.
- 5.55 The Walkers Welcome scheme is designed to engage all of the different elements of the community in presenting a town, village or defined area to offer the best walking experience possible. A 'Walkers Welcome Charter' is established for each participating destination including key deliverables such as:
- guaranteeing regular maintenance and upkeep of local walks;
 - having a local walking officer offering assistance and advice;
 - walks information, including mapboards and signage;
 - local 'Walkers Welcome' approved accommodation; and
 - local amenities committed to providing walker friendly service in shops, pubs and cafes.
- 5.56 In return, the destination and participating businesses are able to showcase the 'Walkers Welcome' logo, with the centre itself promoted as a 'Walkers Welcome' destination in official promotional literature. From a strategic perspective, Failte Ireland denotes a key purpose of initiating this scheme is to allow destinations to establish a reputation for walking that in turn will increase visitor numbers and grow revenue for all.
- 5.57 To date, this initiative is being trialled at Tinahely, Co. Wicklow; Donegal Town and surrounding area; Slieve Blooms; and The Glen of Aherlow, Co. Tipperary. It is our view that the villages and towns as highlighted for the Beara Peninsula and the Sheep's Head Peninsula each have the qualities necessary to provide a suitable welcome to walkers; and therefore should seek to be included within the Walkers Welcome initiative.
- 5.58 It needs to be recognised that the success of the scheme will be reliant on a strong interrelationship and co-ordination between individual enterprises and the community leaders of the towns and villages. As a result, it is our view that it would be insufficient for just one town or village to pursue 'Walkers Welcome' without the inclusion of the others. Rather, the towns and villages need to be presented collectively in order to create a stronger and more coherent proposition.
- 5.59 Whilst having all elements of the community and business involved in the scheme is important to its overall delivery, it will be the availability of 'Walkers Welcome' accommodation that the walkers themselves will look for during the decision-making process – i.e. they need to know that they will have a place to recuperate after a

challenging days walk. VisitScotland in its Walkers Welcome scheme stipulate that providers need to tailor their accommodation enterprises to suit walkers' needs. Facilities and services identified include:

- for serviced operators:
 - drying facilities for wet outdoor clothing and footwear;
 - a hot drink on arrival;
 - a late evening meal (available until 8:00 pm) if there are no other options within one mile. A late snack should be offered after 8:00 pm;
 - early breakfast from 7 am, or for very early leavers a tray the night before;
 - a packed lunch or flask filled - upon request one - ; and
 - information about local walking routes, local public transport and a weather forecast.
- for self-catering operators:
 - drying facilities for wet outdoor clothing and footwear;
 - facilities for washing clothes;
 - information about local walking routes and local public transport;
 - a telephone number for a weather forecast;
 - details of local rescue services; and
 - details of the establishment's Ordnance Survey (OS) co-ordinates (if outwith a village).

5.60 It appears that many of these facilities and services are already being provided by a significant number of local accommodation enterprises. As a result, it is more the case that they are lacking the ability to compete against their counterparts in other international destinations.

Catering

5.61 In addition to accommodation, each of the main centres appear to have a good number and a good range of catering facilities in the form of restaurants, cafés and bars/pubs (see Figure 2. As with accommodation, these services need to be encouraged to tailor their services towards the walking market.

5.62 A common observation locally is that walkers are not the biggest spenders and often utilise onsite facilities (e.g. restrooms) without contributing much in return. Whilst this may be true whilst walkers are on a walk, businesses need to be more strategic about the opportunity that walkers present to their business. On the one hand, and especially in a location such as the West Cork's West Coast, walking as an activity brings visitor volume, much more so than any other type of activity that could be facilitated in this area. This means that they may not get always get visitors wanting to eat a cooked meal whom will spend 30-45 mins, but they may get 10, 20, 30 customers spending a couple of minutes but buying a drink, a chocolate bar, a sandwich, etc; which still means sales. On the other hand, every walker that utilises its facilities whilst on a walk offers a potential repeat customer for an evening

- Beara Way – 1 million bednights, which, at an average duration of 4 nights per trip, equates to some 225,000 visits per annum.
 - Sheep's Head Way Western Trails – 513,000 bednights, which, at an average duration of 4 nights per trip, equates to some 128,250 visits per annum.
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- 5.37 Altogether, we estimate that this bedspace capacity represents approximately one-third of the provision in West Cork. Although this stock provision appears reasonable given the size of each of the towns and villages associated with the routes, when translated into trip capacity it can be seen that accommodation is a limiting factor in maximising the opportunity presented by the attractiveness of the landscape in relation to tourism.
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- 5.50 In addition to this, the consultation process has identified that it may be possible to encourage some of the existing providers, especially along the northern route, to expand their services to include basic bunkhouse provision. A key barrier to this has been the lack of guidance provided by Fáilte Ireland, however this will be resolved in the near future.

Accommodation for Centre-based Walkers

- 5.51 The accommodation review denotes that Kenmare has the largest concentration of accommodation enterprises, although there is a good level of accommodation provision in Bantry, Glengarriff, and Castletownbere (see table 5.2).
- 5.52 It should be noted, however, that the accommodation provision in Kenmare is not only associated with the Beara Peninsula, but is perhaps more aligned to the Ring of Kerry which is a very popular driving trail. It is also a gateway to Killarney as one of Ireland's most popular National Parks. Nevertheless, this observation at least demonstrates the importance of Kenmare as an accommodation hub and gateway to West Cork.

Table 5.2						
Number of Accommodation Establishments by Key Town/Village						
	Bed and Breakfast	Caravan And Camping	Hostel	Hotel	Self Catering	Grand Total
Kenmare	42		1	6	27	76
Bantry	18			3	14	35
Glengarriff	7	3	1	3	9	23
Castletownbere	8	1			10	19
Kilcrohane	5		1		11	17
Durrus	4	1			8	13
Allihies	3		1		6	10

- 5.53 Accommodation provision in Durrus and Kilcrohane is also strong given the size of these centres. However, at present none of these centres have evolved into a clearly defined 'walking hub'.
- 5.54 Discussion with Fáilte Ireland has identified that they are currently piloting a programme that could be utilised by these centres in order to promote their credentials as gateways and hubs for those interested in walking; namely the 'Walkers Welcome' scheme.
- 5.55 The Walkers Welcome scheme is designed to engage all of the different elements of the community in presenting a town, village or defined area to offer the best walking experience possible. A 'Walkers Welcome Charter' is established for each participating destination including key deliverables such as:
- guaranteeing regular maintenance and upkeep of local walks;
 - having a local walking officer offering assistance and advice;
 - walks information, including mapboards and signage;
 - local 'Walkers Welcome' approved accommodation; and
 - local amenities committed to providing walker friendly service in shops, pubs and cafes.
- 5.56 In return, the destination and participating businesses are able to showcase the 'Walkers Welcome' logo, with the centre itself promoted as a 'Walkers Welcome' destination in official promotional literature. From a strategic perspective, Fáilte Ireland denotes a key purpose of initiating this scheme is to allow destinations to establish a reputation for walking that in turn will increase visitor numbers and grow revenue for all.
- 5.57 To date, this initiative is being trialled at Tinahely, Co. Wicklow; Donegal Town and surrounding area; Slieve Blooms; and The Glen of Aherlow, Co. Tipperary. It is our view that the villages and towns as highlighted for the Beara Peninsula and the Sheep's Head Peninsula each have the qualities necessary to provide a suitable welcome to walkers; and therefore should seek to be included within the Walkers Welcome initiative.
- 5.58 It needs to be recognised that the success of the scheme will be reliant on a strong interrelationship and co-ordination between individual enterprises and the community leaders of the towns and villages. As a result, it is our view that it would be insufficient for just one town or village to pursue 'Walkers Welcome' without the inclusion of the others.

Rather, the towns and villages need to be presented collectively in order to create a stronger and more coherent proposition.

5.59 Whilst having all elements of the community and business involved in the scheme is important to its overall delivery, it will be the availability of 'Walkers Welcome' accommodation that the walkers themselves will look for during the decision-making process – i.e. they need to know that they will have a place to recuperate after a challenging days walk. VisitScotland in its Walkers Welcome scheme stipulate that providers need to tailor their accommodation enterprises to suit walkers' needs. Facilities and services identified include:

- for serviced operators:
 - drying facilities for wet outdoor clothing and footwear;
 - a hot drink on arrival;
 - a late evening meal (available until 8:00 pm) if there are no other options within one mile. A late snack should be offered after 8:00 pm;
 - early breakfast from 7 am, or for very early leavers a tray the night before;
 - a packed lunch or flask filled - upon request one - ; and
 - information about local walking routes, local public transport and a weather forecast.
- for self-catering operators:
 - drying facilities for wet outdoor clothing and footwear;
 - facilities for washing clothes;
 - information about local walking routes and local public transport;
 - a telephone number for a weather forecast;
 - details of local rescue services; and
 - details of the establishment's Ordnance Survey (OS) co-ordinates (if outwith a village).

5.60 It appears that many of these facilities and services are already being provided by a significant number of local accommodation enterprises. As a result, it is more the case that they are lacking the ability to compete against their counterparts in other international destinations.

Catering

5.61 In addition to accommodation, each of the main centres appear to have a good number and a good range of catering facilities in the form of restaurants, cafés and bars/pubs (see Figure 2. As with accommodation, these services need to be encouraged to tailor their services towards the walking market.

5.62 A common observation locally is that walkers are not the biggest spenders and often utilise onsite facilities (e.g. restrooms) without contributing much in return. Whilst this may be true whilst walkers are on a walk, businesses need to be more strategic about the opportunity that walkers present to their business. On the one hand, and especially in a location such

as the West Cork's West Coast, walking as an activity brings visitor volume, much more so than any other type of activity that could be facilitated in this area. This means that they may not get always get visitors wanting to eat a cooked meal whom will spend 30-45 mins, but they may get 10, 20, 30 customers spending a couple of minutes but buying a drink, a chocolate bar, a sandwich, etc; which still means sales. On the other hand, every walker that utilises its facilities whilst on a walk offers a potential repeat customer for an evening meal and after-walk drinks – whether they are staying in serviced or self-catering accommodation. Therefore, supporting walkers on a walk could support their main business at another time.

- 5.63 In this respect, the consultation process has highlighted some unsympathetic views toward walking tourists. It is these views that need to be changed through a programme of education to ensure that local catering businesses better understand the behaviours of walking visitors and the type of opportunity that they provide. This is where the Fáilte Ireland 'Walkers Welcome' initiative may well have significant worth.

Walking Guides

- 5.64 Walking guides are essential to developing and supporting walking tourists. Although research suggests that walking visitors have a greater tendency to be independent and self-guiding, there remains a significant proportion (15%) that will require and actively seek guide services. For some, this will be given assistance in navigation; for others it will be to mix with like-minded people; and for others, it will be to benefit from the greater depth of understanding and interpretation that a guide provides.
- 5.65 The WCDP and Fáilte Ireland are currently supporting a training programme to create a number of qualified walking guides in the West Coast – the Walking Group Leader. The programme is first and foremost concerned with delivering safety and orienteering skills (Technical Competence, Group Management, Rescue Care Emergency), and rightly so. However, whilst this is important, the guided service needs to be sold on the 'added value' that the guides themselves can bring in relation to knowledge of local culture, history, landscape features, wildlife, and other attractions in the area. This is included within the Local Heritage and Folklore Module of the training course.
- 5.66 The guides that assisted the project team to understand the walking qualities of the area demonstrate good local knowledge in this regard. Nevertheless, discussion with some other local operators and stakeholders (e.g. Allihies Copper Mine) suggest that the guided walks are not yet fully integrated with all of the attractions and natural features available in the area. In this respect, there is an opportunity to utilise the availability of other features to enhance the walk; sell the idea of visiting these sites on other days; or to arrange separate specialist 'talks' for their group.
- 5.67 This should not be taken as a criticism of the existing training programme, as the programme is not yet complete; but rather as an observation that these guides will also act as ambassadors for the area as a whole and can use their influence to encourage other visitor activity.

Baggage Carriage Service

- 5.68 Baggage carriage can often be an important offer for walking destinations, removing the need for point-to-point walkers to carry heavy bags with them on their trek. There is evidence of bag carriage locally, which is being organised between the accommodation

enterprises themselves and often forming part of a ‘walking package’ being organised by walking tour operators. However, this service does not appear to be being promoted as a co-ordinated part of the ‘walking package’ available to independent walkers. Given that, overall, most walkers book their trips independently, it is suggested that the service be marketed to this group also in order to further enhance the area’s reputation for walking holidays.

Retail

- 5.69 As highlighted in Section 2 in relation to Fort William, developing walking tourism and outdoor recreational activity as a tourism theme can result in the creation of new retail opportunities for the towns and indeed villages of the destination.

- 5.70 Although there is a general perception that most walking enthusiasts will already have their equipment (shoes, clothes, backpacks, walking sticks) which they will bring with them, this will not always be the case. Some may forget to bring certain items; others will look to renew and upgrade. Variable climatic conditions, too, mean that different clothing requirements might be required than envisaged when packing. It is these types of reasons, combined with the overall volume of visits that Fort William receives, that have enabled some well-known outdoor clothing brands to become firmly established in the town.

- 5.71 A brief review of retail enterprises has revealed that, to date, the presence of the walking routes close to the centres of Bantry, Glengarriff, Castletownbere and Kenmare has not resulted in outdoor activity retail outlets. Encouraging this type of investment generally requires demand to be present on the ground as a means of delivering sufficient retail footfall. As such, retailers may need to be satisfied that a critical mass of walking and other outdoor provision is in place before they will be willing to invest in this type of business. If this can be achieved, however, outdoor retail will help to authentic the sense that the West Coast is a primary destination for walking.

Branding, Marketing and Information

Branding

- 5.72 West Cork, through the Fuchsia logo and associated “A Place Apart” tagline (www.westcorkaplaceapart.com), already has an area ‘brand’ that is being utilised to sell West Cork 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.

- 5.73 From a tourism perspective, ‘A Place Apart’ certainly delivers connotations of West Cork being somewhere different and somewhere special. However, when viewed in combined with a map showing West Cork’s peripheral location, it might also suggest that its outer reaches (i.e. the West Coast) are some distance away and somehow difficult to get to. In this respect, there is certainly a perception locally that West Cork’s West Coast is not fully integrated and represented by the Fuchsia Brand, and that it the brand itself has benefited the areas close to Cork City (i.e. Kinsale and Clonakilty) much better.

- 5.74 It is beyond the scope of this report to validate or refute these views. However, what is clear is that the Fuchsia Brand in its current format is not flexible enough to be able to

distinguish between the different landscape characters of West Cork that in turn will have an influence on the types of tourists they attract.

- 5.75 In particular, it is our view that West Cork's West Coast, which comprises the Beara, Sheep's Head and Mizen Peninsula's and the local island's, is very different in landscape character to the gently rolling patchwork of farmland and lowlands that can be found in its eastern area around Clonakilty and Kinsale. The eastern areas are certainly very attractive and well presented, exemplified by Kinsale as one of Ireland's most charming small towns. In contrast, the western area has a natural rugged, craggy and windswept beauty that has and continues to be influenced by the strength of the wind, rain and waves that prevail here as an area directly exposed to the full force of the Atlantic Ocean.
- 5.76 It is our view that West Cork's West Coast is an area of outstanding natural beauty that deserves to be defined as a tourism character area in its own right. Furthermore, and with reference to this study, drawing greater attention to the landscape character in association with the availability of the walking trails presents a distinctive and saleable package that is reminiscent of the likes of the Western Highlands of Scotland, Cornwall's North Coast, Northern Spain's Camino del Santiago and the Brecon Beacons in Wales, to name but a few. In terms of landscape alone, it is our view that West Cork's West Coast has the character to compete successfully with any of these other popular walking destinations. But it needs its own distinctive area branding (for example, West Cork's West Coast, Ireland's Wild West, the Atlantic South West, The Three Peninsula's, The Peninsula's and Islands) to achieve this.
- 5.77 A distinctive brand would help to provide a consciousness for the area that can be utilised by Ireland's promotion bodies (Fáilte Ireland, Tourism Ireland, irishtrails.com and independent tour operators), travel publications (e.g. Lonely Planet, Rough Guide, Fodor's Guide), and specialist travel press (e.g. Walking World Ireland, Trail, Country Walking Magazines). On this note, we are aware that Fáilte Ireland is currently exploring its regional and sub-regional 'destination' brands.

Marketing and Packaging

- 5.78 Creating an appropriate brand for West Cork's West Coast will also assist in future marketing strategies. As identified previously, walking is a popular activity amongst all of the key international markets for Ireland and is improving in popularity from a domestic perspective. By positioning West Cork's West Coast as a premier walking destination in Ireland, it will be easier to target walkers amongst these key markets.
- 5.79 The named long distance trails should be the primary focus of attention here as it is through these walks that the 'brand' will gain its reputation and recognition. However, the fact that other walks in the area are available that suit different abilities also needs to be translated through the marketing campaigns.
- 5.80 A good example of how this is achieved is the Western Highlands, with the main 'named' routes being the West Highland Way and the Ben Nevis Summit Trail. Nevertheless, walkers utilise the other trails and challenges available in the area as part of 'suite' of walks that they may undertake under one or a series of visits to the area.
- 5.81 Another example is the South West Coast Path in the UK. Recognising that few walkers would attempt this walk in one trip, the route has been segmented into bit-size sections based upon specific features of interest and trail ease. Some sections also include loops

that return users back to the start point. All of this is aimed at engaging more users and encouraging them to return year after year to complete different sections. However, at the forefront of the marketing and information is the fact that it is the ‘South West Coast Path’ – and this will be the ‘name’ that visitors will mention to others in conversation.

- 5.82 The Beara Way, Sheep’s Head Western Trails and Eastern Trails need to be presented in a similar manner. This is particularly pertinent for the Sheep’s Head Way Eastern Trails which, at present, is complicated to understand from a walkers perspective – i.e. is it a long trail, a pilgrimage trail or a series of single trails? Although the answer is ‘all of this’, it is quite difficult to actually get to this answer through the existing material. It is our view that the main focus should be on the long distance trail element with the ‘Pilgrimage to Gougane Barra’ being the primary ‘challenge’ of completing the walk. The naming of the individual walks ideally should be removed, although the description of the route and its key features should be retained, and indeed replicated for the other trails.
- 5.83 It is important to note that the three trails are likely to have a slightly different market appeal. For instance:
- 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 Sheep’s Head Western Trails has greater prospects amongst beginners, part-time wanderers and committed wanderers, with a key selling point being the flexibility for users being able to create their own route preferences.
 - The Sheep’s Head Eastern Trails will likely have greatest appeal amongst part-time wanderers, although some of the trails would also support amblers and beginners. The purpose of ‘pilgrimage’ to honour St Finbarr should also be brought to the fore.
- 5.84 In addition to the above, a full circuit could also be presented that takes users from Dursey through to the Sheep’s Head Lighthouse via Hungry Hill and Gougane Barra for those seeking a long-distance trail that incorporates ‘the best of the Peninsula’s’.
- 5.85 In terms of overseas markets, the West Coast has seemingly 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; combined is sufficient to allow the West Coast to compete effectively within this market place.
- 5.86 However, as highlighted above, these ‘sales’ messages will need to be supported by the availability of transport and of walker friendly accommodation and catering provision on the ground. The prospect of packaging, therefore, needs to be suitably visible through marketing and promotion campaigns. The presence of outdoor activity stores as part of the marketing campaign will further reinforce the legitimacy of the destination for walking and other outdoor pursuits.

Information Provision

- 5.87 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.

Pre-Travel Information

- 5.88 As the review process highlights, there are a number of different sources that advertise the walks available in the West Coast. However, the way in which the information is presented; the clarity with which it is presented; and the ways in which it can be utilised; currently lacks co-ordinated.

- 5.89 It is beyond the scope of this study to investigate all of the main information channels that could be used by walkers, but the following provides some observations on the main ones used to inform this report:

- discoverireland.ie (Fáilte Ireland), discoverireland.com (Tourism Ireland), and irishtrails.ie (NTO/Irish Sports Council) all include of description of walks available in Ireland. However, there is a lack of consistency in the walks carried in that discoverireland.com only has details of 28 named trails (including Sheep's Head West but not the other two trails); discoverireland.ie includes all 43 National Trails and 100 Looped Walks; and irishtrails.ie defines 537 'walks' including the National Trails, many of which have been segmented into smaller walks in their own right.
- The description of the walks is sometimes inconsistent. For Sheep's Head Way, for example,;
 - discoverireland.com describes two walks, a short loop (4km) and a long route (16km), with the start and finish point at 'a car park near the end of Sheep's Head'.
 - discoverireland.ie and irishtrails.ie both describe the 88km circular walking route beginning in the town of Bantry.
- The availability of maps and additional information is inconsistent. For example, for Sheep's Head Way:
 - discoverireland.com provides an overview map available, although this is for the whole of the walk and not the networked routes that run throughout the peninsula. This is accompanied by a brief description and additional information on eight different sections of the route, apparently taken from walkireland.ie (this link does not work).
 - discoverireland.ie does not have a map of the trail, however there is a link to the Sheep's Head Way website (sheepsheadway.ie). An interactive map highlights facilities such as accommodation and food and drink in the area, but this is not translated back to the trail route (i.e. proximity to the trail).
 - irishtrails.ie provides one overview map and a further five maps of sub-divided sections of the trail presented on an Ordnance Survey base.

- Only one site, discoverireland.ie, appears to provide an Internet link to external sites that could hold more information. Discoverireland.com provides its own contact number, whilst irishtrails.ie provides the contact details for South West Tourism (www.corkkerry.ie - this link does not work).
- Only discoverireland.ie provides local packaging information, namely coupling walks with accommodation. Some travel information is also provided, but this is not as detailed as that provided on irishtrails.ie which describes a daily bus service from Cork to Bantry. Although no times are given, a link to Bus Eireann website is provided.
- Beara Tourism and the Sheep's Head Way have their own websites. The look, feel and navigation around these website is very different. The information levels are also different. In this respect:
 - Beara Tourism site is very busy looking website with little uniformity in terms of page layout. The interactive map provides a useful breakdown of information by Peninsula town/village, however this is not related back to the Beara Way itself. A detailed breakdown of the walk is provided, with OS maps of the different sections available for download.
 - The Sheep's Head Way website is much cleaner with its own 'branding' and it is easier to find accommodation and other services in the area. The walking trail is highlighted as a key feature of the Peninsula, but there is no supporting trail map and only a very brief route description. The Eastern Trails are not highlighted here.
- Each of the main towns and villages appear to have their own websites that contain useful local information, however these are not referred to as a 'link' that users can also browse.

5.90 The above are not only issues for West Cork, but can be commonplace for tourism destinations across the globe. It is a position that reflects the diversity of interests that are often involved in delivering tourism at a local level. The problem for the prospective visitor, however, is that it can lead to a significant element of confusion that in turn may deter a visit. The different description of walks associated with the West Coast as a walking destination, for example as presented by discoverireland.ie walking in the West Coast, could also be miss-interpreted and act as deterrent:

"Opportunities for mountainy highs abound. But you'll need to be an experienced mountain climber to go it alone on these peaks. If you're not au fait with compass, map reading and ropes, it's wise to travel with a guide who'll pick the best routes for your ability, teach you skills along the way and inspire you with history and folklore"

5.91 Whilst this sentiment may be true in some instances, it is certainly not the case for all sections of the Beara Way or Sheep's Head Way, with the NTO audits generally denoting good levels of waymarking. For example, a recent entry into Trip Advisor on the Beara Way highlights the following:

"The Beara Way is really good signed so there is nearly no possibility to get lost. The landscape is amazing. Don't forget rain clothes, hiking boots and a warm cap!"

5.92 Moreover, both the Beara Way and Sheep's Head Way are advertised as 'self-guided walks' elsewhere and the many of the looped walks associated with both peninsula's are relatively easy to navigate. This type of description is an important guide to the walk and

whether it is suitable or not, therefore any descriptive text used on such sites needs to be carefully considered.

- 5.93 On the basis that the Internet is now regarded as one of the principal sources of pre-travel information, greater co-ordination between these principal site providers to allow and a more fluid transition from 'market grabbing' headline information to 'deal sealing' detailed information is highly recommended. This should be a critical component of the 'branding' of the West Cork West Coast walking experience.

At-destination Information Provision

- 5.94 Those seeking information on walking trails once at the destination are more likely to be holidaymakers seeking something to do whilst in West Coast rather than dedicated walking holidaymakers to West Cork.
- 5.95 Nevertheless, information provision locally will still be important as a means of providing reinforcement messages, especially in terms of allowing visitors to understand 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 directions to trailheads, public transportation, catering, baggage transfer, retail outlets and mapping. Tourist Information Centres (official and local) and accommodation providers have a crucial to play in this regard.
- 5.96 A cursory visit to the Bantry TIC suggests that, as the principal information centre in the area, more could be done to showcase the 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 Sheep's Head Way. However, the displays are quite basic and could be easily missed by casual browsers.
- 5.97 Mapping on the trails and more detailed route information appears to be the main gap in local information provision. The fact that the pathways are now depicted on the OS Discovery Series will certainly assist, with many walkers preferring to use this and a compass as their main tool for orientation. However, others will seek more locally orientated mapping. The pocket guides accompanying each of the trails are each good examples of the type of literature that many visitors find useful, although each have their own style and usability issues. In addition, it acts as a souvenir that visitors take home with them. A suggestion of the consultation process was that these booklets be coupled with a stamp that could be entered into the book upon completion of the route/section, again providing a further memento of the trail.

Trail Heads and Information Boards

- 5.98 Trail Heads are an important part of the walking experience as they provide a formal introduction to the trail. Ideally, the majority of the users will already be aware of the walking experience they are about to embark upon through information collected through the sources as outlined above. However, this should be reinforced at the Trail Head through the presentation of an information board.
- 5.99 The NTO generally outline the types of information that should be included, such as trail length and time allowances (for each section if appropriate); brief description of the trail challenge (for each section if appropriate); a 'You are Here' indicator; markers for potential stop-off/refreshment points; markers for key features of interest; and key contact numbers.

- 5.100 Although not all of the Trail Heads were audited as part of our review, our observations support those of the NTO that some of this information is lacking, especially trail timings which can be important to allow users to gauge whether they have sufficient time to complete the trail.

Trail Access Points

- 5.101 The positioning of the Trail Access Points (i.e. the main centres that visitors should be directed to as a means of accessing the trails) is also important, particularly as a means of maximising the economic benefits of walkers. Ideally, the main Trail Access Points should be easily accessible and associated with a key town/village that coincides with the trail route. In this respect, the following provides our view of the Trail Access Points for each of the West Coast Trails:

- The Beara Way:
 - Principal Trail Heads – Glengarriff, Kenmare and Castletownbere
 - Secondary Trail Heads – Adrigole, Bere Island, Dursey Island, Ardgroom, Allihies, Eyries, and Tousist
- The Sheep's Head Way Western Trails:
 - Principal Trail Heads – Bantry and Durrus
 - Secondary Trail Heads – Kilcrohane and Ahakista
- The Sheep's Head Way Eastern Trails
 - Principal Trail Heads – Bantry and Drimoleague
 - Secondary Trail Heads – Kealkill and Gougane Barra

Other Considerations

Walking Trail Development

- 5.102 Although the remit of this study is to look at ways to maximise benefits of the existing walks rather than comment on any specific gaps in walking trails themselves, the investigation process has highlighted that the development of some additional walks could be of significant benefit in relation to the overall walking appeal of the West Coast.
- 5.103 In particular, one of the main gaps in provision relates to the Mizen Head Peninsula. At present, there is no walk that circumnavigates the Mizen to match that of the Beara and Sheep's Head Peninsulas. This would appear to represent a significant gap in the walking product of the overall area.
- 5.104 The Walks Scheme is now closed to new walks, with the continuation of the scheme discussed previously in Section 3. If the scheme were to continue and be open to new participant schemes, we would strongly recommend that the prospect of a Mizen Loop be examined. It is our firm view that a 'Peninsula and Island's' walking product to match the Beara Way and the Sheep's Head Way on the Mizen would further enhance the reputation of West Cork's West Coast as Ireland's coastal walking hub. The fact that the tip of the Mizen Peninsula contains the Mizen Head Visitor Centre, an award -winning Maritime Museum and Heritage Attraction, adds further strength to this premise. To act as a

comparison, Lands' End in Cornwall acts a popular destination for walkers along the South West Coast Path. For Mizen, the Visitor Centre and the Fastnet Lighthouse could present a similar landmark for walkers. Moreover, the prospect of the Mizen Trail that would connect with the Sheep's Head Way (via Durrus) and the Beara Way (via the Sheep's Head Eastern Trails) would represent Ireland's own version of the South West Coast Path.

- 5.105 Easy access themed walks, such as wildlife trails and heritage trails, that engage families with children and the elderly should also be included within the overall trail package. In this respect, although walking as an interest and activity is one that can be pursued throughout life, certain life stage influences – e.g. caring for the young or elderly - can restrict participation in preferred trails. In these instances, the visitor regard waling as a significant interest but will need walks that are tailored around the wider composition of the party. In this respect, the National Looped Walks combined with heritage trails, wildlife trails, woodland walks and so on will present a key component of the product offer that these types of visitors will seek.

Insurance

- 5.106 An issue that has been raised during the investigation process concerns insurance and the implications of insurance over land access and also supporting services to support walkers.
- 5.107 An example given concerned the transportation of visitors who are centre-based to various points along the pathway. In these instances, visitors often call upon the accommodation operator to assist in transporting between the route and the place they are staying. Whilst the operator is generally willing, the cost of insurance is said to be inhibiting for those unwilling to take the risk of an accident happening.
- 5.108 Clearly this is a position is a cause for concern for the operator who is seeking to ensure that their guest has the best possible experience. Discussion with Fáilte Ireland has highlighted that the organisation is aware of this issue and is examining appropriate solutions.

Downloads and 'Smart Device' Apps

- 5.109 Travellers are becoming increasingly sophisticated and are seeking products that make it easier to understand the character and support services of their destination of choice. This is especially true of outdoor enthusiasts, with portable devices now available from which users can plot routes, follow trail progress, and locate geographical position to assist in orienteering.
- 5.110 As technology advances, these devices will become more affordable and widespread, particularly where they involve 'smart' device apps for mobile phones. To exemplify this premise, Sustrans has recently released an App that will give people access to over 25,000 miles of walking and cycling routes across the UK; Walking World provides digital mapping of walking routes that transferred to a handheld GPS system; and GPS systems are now being developed for smart phones through software that can be downloaded through an App.
- 5.111 In an ever changing and advancing technological world, having data that is digitised is vital to be able to respond to the demands of the end user. In this respect, and as part of the investigation process, the study team has gathered walk, accommodation, catering and

other information and transferred this onto our own Geographical Information System (GIS). At the moment, the information is very much functional in style and format in order to inform the study. However, all of this information could be easily transferred onto a more user-friendly interface and uploaded onto a dedicated website for use and download by walkers. This will be explored in more detail during the next phase of the investigation.

- 5.112 The Trail Kilkenny walking app provides an example of the type of end-product that can be achieved through this initiative. The app, designed by Trail Kilkenny and supported by Kilkenny Leader Partnership, provides details on a series of walks in the Kilkenny area. The walks are fully mapped with supporting descriptions and visuals of the pathway. The app also details places of interest along the trail; and tourism businesses, restaurants, craft and other shops, and information points along its route. The details of four walks are provided, with a further 10 'Community Trips' also being published. The app can be downloaded in advance of the trip, meaning that users have a greater control over the planning aspect of the trip.

6 Economic Impact of Walking Tourism - Summary

Introduction

- 6.1 As part of the investigation process, URS-Scott Wilson has produced an economic impact assessment of walking tourism in West Cork. The full report is presented as an annex to the Stage A report, however for ease we present the executive summary below.
- 6.2 The purpose of undertaking the assessment is to complement the overall study and to ensure that any future developments related to walking tourism can be assessed against the potential economic benefits that this may realise to West Cork in terms of jobs and expenditure.

Approach

- 6.3 Our approach for measuring the economic impact of walking tourism in West Cork is centred on four key tasks; benchmarking against other research on walking based tourism; a business survey with local businesses; development of a socio-economic baseline using secondary data sources; and an impact assessment where the relevant additionality assumptions were applied to the baseline in order to provide the economic impact in terms of jobs and expenditure.

Assumptions

- 6.4 Below is a summary of the assumptions used to estimate the economic impact:

Number of walkers to West Cork

- 6.5 The total number of bedspaces was taken from the audit conducted in the other study mentioned. From this it was possible to calculate total number of bednights. Occupancy assumptions were applied to each of the accommodation stock based on data from the West Cork Survey and Fáilte Ireland data.

Overnight walkers

- 6.6 Using information gathered from the business survey, Fáilte Ireland and a UK Tourism Survey it was possible to estimate the number of people who were staying in the occupied bedspaces where walking was their main motivation for visiting. The data for accommodation on the actual walking routes was less reliable than for accommodation in the remainder of West Cork and as such a range of assumptions were presented for the former.
- 6.7 It was also important to distinguish between overseas and domestic overnight visitors as they spend differing amounts.

Tourist day walkers (spend over 3 hours)

- 6.8 A judgement was made on what percentage of those living in the catchment area (2 hours drive) would walk in West Cork. The general assumption was that there would be more people living closer who used the walks and on a more regular basis than those living further away. However, those living further away would spend more money on each visit.
- 6.9 On top of these there those people who are holidaying in the area for other reasons but spend more than 3 hours walking and have an economic impact. Some of this spend would have been spent locally as they are already staying within the vicinity. However, without the walking routes many visitors would shorten their stay and/or go elsewhere and spend the money.

Expenditure

- 6.10 The average expenditure per visitor type was taken from Fáilte Ireland data.

Additionality

Leakage

- 6.11 Applying the above average spend per visit to the number of walkers provides the gross spend of walking in West Cork. However, some of this spend is lost outside of the local economy. These are the 'leakage' effects. This includes taxes (including VAT) and the spending of goods and services imported to West Cork. A good proxy for leakage is travel to work information. This was calculated for two benchmark areas.

Multipliers

- 6.12 A composite multiplier was used to show the further economic value associated with additional local income and local supplier purchases. In 'Perspectives on the West Cork Regional Brand' two multipliers were presented for the area, these are 1.28 for expenditure and 1.25 for employment. This equates to a composite multiplier of 1.6 (1.28 X 1.25). This multiplier has been used.

Employment

- 6.13 The number of jobs created / safeguarded from walking tourism is calculated by applying an average job creation per net expenditure figure. In this instance, and based on the average from the relevant case studies this is set at €39,500.

Economic impact

6.14 The following table sets out the economic impact of walking tourism:

No. of Walkers	Low	Medium	High
Overnight walkers, of which:	19,000	27,300	35,600
<i>Domestic</i>	9,900	14,200	18,500
<i>International</i>	9,100	13,100	17,100
Tourist day walkers (over 3hrs), of which	90,500	89,800	89,100
<i>Lived within the catchment area with sole intention of walking</i>	67,500	67,500	67,500
<i>Holidaying for another reason – staying in WCWC accommodation</i>	13,300	12,600	11,900
<i>Holidaying for another reason – staying in remainder of West Cork</i>	9,800	9,800	9,800
Total economically active walkers	109,500	117,100	124,700
Gross Expenditure			
Overnight - domestic	€1.9m	€2.8m	€3.6m
Overnight - international	€4.1m	€5.9m	€7.7m
Day tourist (over 3hrs)	€1.0m	€1.0m	€1.0
Total expenditure (gross)	€7.0m	€9.7m	€12.3m
Net Expenditure			
Leakage	10%	10%	10%
Gross expenditure minus leakage	€6.3m	€8.7m	€11.1m
Composite multiplier (induced and indirect)	1.6	1.6	1.6
Net expenditure (Economic Impact)	€10.1m	€13.9m	€17.7m
Employment			
Direct	1708	245	312
Indirect and induced	78	108	137
Total employment	256	353	449

Summary

- 6.15 The key finding of this exercise is that walking tourism, at present, is estimated to be worth between €10.1 million and €17.7 million per annum to in the West Cork's West Coast, with the likely scenario (medium) being €13.9 and supporting 353 Full Time Equivalent jobs.
- 6.16 It is important to recognise that this has been achieved through the provision of two National Walks that have been developed almost as separate entities. In our view, this also represents a significant return on the investment now being made through the Walks Scheme, estimated at around €500,000 for those participating in West Cork's West Coast. Moreover, a relatively modest increase in the number of economically active walkers through more concerted effort in relation to marketing, packaging and supported services could, in our view, realise further gain. This will be explored further in Stage B, but as an initial example, an increase of 10% economically active walkers would generate an additional €1.4m and support over 35 jobs per annum.

Appendix A: Accommodation Audit Notes and Assumptions

Data Gathering

In order to understand the capacity of West Cork, and specifically West Cork's West Coast, for supporting overnight visitors, URS-Scott Wilson undertook an exercise to gather data on the type, capacity (bedspaces) and location of accommodation across the area. These are mapped on Figure 1 in the main report.

The accommodation sources were varied. Fáilte Ireland providing details of 'approved' accommodation; West Cork Development Partnership providing details of accommodation members of its Fuchsia Brand; the providers advertised through Beara Tourism; and those advertised through The Sheep's Head Way website.

However, upon verifying these accommodation establishments, it became apparent that there were a significant number of other accommodation providers that were not included through these sources. As such, URS-Scott Wilson team trawled the Internet to determine additional providers, including through community council websites, tripadvisor.com, and various dedicated self-catering marketing agencies.

We believe that data presented in the report now forms the majority of accommodation stock in West Cork. However, it needs to be noted that accommodation provision is a very dynamic sector, with many smaller enterprises continuously entering and leaving the sector. In this respect, there may still be some providers that are not accounted for in this audit, especially in terms of self-catering where many providers are associated with dedicated marketing organisations that have different 'regional' definitions (i.e. South West of Ireland rather than Cork or West Cork).

Capacity Assumptions

In collating the accommodation information, we were keen to understand the overall capacity for overnight stays in West Cork as this is the principal driver for deriving economic benefits for the local area. On the whole, bedspace capacity is not given for any types of accommodation, with serviced generally providing number of rooms, self-catering providing maximum number of people, and camping and caravan sites providing static and touring pitch numbers. Furthermore, this information is not given in every case.

In order to calculate bedspace capacity, certain assumptions needed to be applied to each accommodation type where bedspace information was not explicitly supplied:

- small B&B/Guest House accommodation – 2.33 bedspaces per room on average;
- self-catering unit – 5 bedspaces per unit on average;
- hostel – 32 bedspaces per establishment on average;
- camping pitches – 3 bedspaces per pitch on average;
- static caravan units – 6 bedspaces per unit on average.

In the majority of instances, either room or unit capacity of the establishment was given from which we were able to apply the above assumptions. However, in some instances this was not given which a further set of assumptions needed to be applied:

- small B&B/Guest House accommodation – 4.5 rooms per establishment;
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- self-catering unit – 1 unit per establishment except where a marketing agency drew reference to ‘several’ units being available where we estimated that this would either be 3 or 5 units available;
 - hostel – 10 rooms on average;
 - camping pitches – 30 touring pitches on average;

As a result, the accommodation data should not be treated as an accurate reflection of the accommodation stock but rather is a good approximation based upon the data available.

Appendix B: National Trails Office Criteria for International Standard Long Distance Walks (Draft)

The document, 'Setting New Directions: A Review of National Waymarked Ways in Ireland', has identified a set of criteria which it believes could be used to differentiate walks and trails that are International Standard. These are as follows:

- The trail should offer at least 2 full days of scenic walking
 - The trail satisfies all aspects of the Management Standards for Recreational Trails in Ireland
 - In addition to information required in the basic standard, detailed information is required on landscape characteristics and heritage sites, providing potential users with a detailed picture of what experience they can expect.
 - The proportion of trail located on unsuitable roads is below 10%
 - Detailed information both in print and on-line is provided for the trail and supporting services. Multi-lingual publications should also be available.
 - The trail offers a variety of suitable accommodation including hotels, B&Bs, Hostels and camping sites along the route. Ideally accommodation providers should be catering for multi-day walker needs offering dry/storage room, evening meals, luggage transfer, pick up / drop off service and packed lunch.
 - The trail offers options for supply of basic provisions including meals, etc along the route.
 - The trail offers options for public transport services both to and from the start/finish.
 - The trail offers luggage transfer service along the route.
 - The trail offers options for qualified guiding services (Walking Group Leader, Mountain Leader or Countryside Guide Award).
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