



WEST CORK MAXIMISING THE BENEFITS OF WALKING TOURISM

Executive Summary

January 2012



Comhshaoil, Pobal agus Rialtas Áitiúil
Environment, Community and Local Government

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Introduction

The following Executive Summary presents the key findings of URS Scott Wilson's investigation into the prospect of maximising the benefits of walking tourism in West Cork on behalf of the West Cork Development Partnership (WCDP).

The principal aim of this study, as defined in the study's Terms of Reference, 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 and associated with walking tourism.

The study has been undertaken in 2-stages:

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

The following summarises the key conclusions and recommendations of the study, and highlights the initiatives required to ensure that walking tourism, as a theme for attracting visitors to West Cork, and in particular its West Coast, is realised.



WCDP Agency Support

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.

The vision statement for the WCDP 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”

The recommendations emanating from this study seeks to build upon the this statement by ensuring that walking tourism contributes to the economic, social, cultural and environmental welfare of West Cork.



Study Overview

West Cork already has the basis from which to become a successful walking destination. This is derived from the series of named trails from which walking tourism can be packaged and promoted, especially in relation to its West Coast. The Beara Way and The Sheeps Head Way Western Trail are both designated as a National Trail; the Sheeps Head Way Eastern Trails is developing a reputation as being a long-distance pilgrimage trail; and the National Looped Trails associated with the area are being extensively promoted to the walking market.

Fundamentally, each of these walks travel across a landscape that can be described as being of outstanding natural character, reaching heights that afford wide panoramas of the area's mountainous, coastal, and countryside landscape. The inclusion of the islands of Bere, Dursey, Garnish and Whiddy which are also looking to draw visitors in for walking and exploration further strengthens this appeal and provides a 'unique selling point' and differentiator from other walking destinations in both Ireland and the UK.

The audit of existing amenities has determined that much of the support structures are also in place to accommodate walking visitors with the towns of Bantry, Glengarriff, Castletownbere, and Kenmare (part of South Kerry but on the Beara Way) providing accommodation and catering services. The smaller villages too have a critical and strategic role to play in this regard, with Adrigole, Ardgroom, Allihies, Eyeries, Tuosist on the Beara Way; Durrus, Kilcrohane and Ahakista on the Sheeps Head Way Western Trails; and Drimoleague and Kealkill on the Sheeps Head Way Eastern Trails; all providing potential start/stop-off points for walkers using the trails and in delivering support services.

Moreover, and as part of this study process, it is estimated that the trails and supporting services are already generating €14 million for the local economy of West Cork's West Coast.



However, despite the existing provision and successes, West Cork as a destination, and its West Coast as a subregion, do not currently feature as highly as other destinations in Ireland for walking (e.g. the Dingle Way and Killarney National Park in County Kerry). This position is not assisted by the fact that Ireland has a comparatively weak profile for walking when compared with Scotland, Wales and England, with these countries benefiting from far greater public access rights to the countryside.

The investment in establishing the trails, their subsequent management and maintenance, and in developing support services has required the co-operation of local community groups, local landowners, regional and national agencies. These interfaces indicate a strong support for walking tourism, and the achievements that have been made to date should be applauded. Nevertheless, for West Cork to maximise the opportunity that walking tourism presents as an important tourism theme, it is clear that all stakeholders would benefit from a strategic vision and direction to enable greater cooperation and co-ordination in relation to developing and promoting walking tourism in the area.



Key Strengths

The following represent some of the key strengths that currently exist in relation to walking tourism in West Cork:

- The landscape setting, especially of the West Coast, invites exploration that, when combined with the walking trails, provides a key motivation for walking tourists and day visitors.
- The range of trails offer good variety in length, duration, and challenge. It is this variation that tourism businesses believe is the main strength for walking tourism in the area.
- There is positive usage of trails as determined by the counts on the Beara Way and the Sheeps Head Way when compared to other trails nationally.
- There is an identified international appeal of walking holidays with walkers coming to walk in West Cork year-round and in any weather – especially from Holland and Germany.
- There is generally a good level of accommodation associated with the two National Trails and there is spare capacity within this accommodation stock to support additional walking holidaymakers.
- Accommodation operators and other enterprises are actively responding to the growing importance of walking as a tourism 'theme', and are already introducing initiatives designed to meet their needs (e.g. bag carriage services, local map provision, walk recommendations, packed lunches, walker drop-off/pick-up services).



Key Issues and Challenges

The investigation process also highlighted a series of issues and challenges that need to be addressed in order to achieve greater benefits from walking tourism. The main issues can be summarised as:

- The availability of walks is currently only ensured through payments through the Walks Scheme.
- The peripheral location of West Cork in Ireland and, indeed, the peripheral location of the key walks in West Cork (i.e. the peninsulas of West Cork's West Coast) present a perception barrier concerning access difficulties, potentially inhibiting visits.
- Co-ordination of services (e.g. bag carriage, drop-off/pick-up, packed lunch, etc) is not universal and is not well advertised to walkers prior to their arrival.
- Some local services identify walkers as a nuisance due to lack of spend and use of facilities, especially toilets, rather than an opportunity with some notable 'stories' of poor service.
- There is a lack of dedicated 'walker-orientated' accommodation supporting point-to-point walkers on the National Trails (e.g. bunkbarns).
- There is a lack of local transport services that would potentially service walkers (i.e. main trail access points).
- Certain amenities (i.e. public toilets) are identified as being a current gap in provision locally, especially in villages.
- The key trails lack interconnectivity between them from a marketing and thematic perspective, with each trail acting as a separate entity.
- The Mizen Peninsula does not have a long-distance circular walk to complement the Beara Way and the Sheeps Head Way, yet the three peninsulas represent the key landscape features of West Cork's West Coast.
- The 'National' designation of the Beara Way and the Sheeps Head Way trails is not being maximised in terms of raising the profile of these walking routes locally, regionally, nationally or internationally.
- The profile of walking trails locally, including in the primary Tourist Information Centres of Bantry and Glengarriff, is limited.
- Some promotional material lack details on the key features of interest (e.g. wildlife, heritage, family, woodland, etc) that walkers could discover.
- There is a lack of consistent messages, imagery and identity to reinforce the view that West Cork's West Coast is one of the primary walking destinations in Ireland.

Vision and Principal Objectives

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

It needs to be recognised here that, although other areas of West Cork have important walking trails, it is West Cork's West Coast that has the capacity to act a destination from which dedicated walking holidaymakers can be encouraged to visit. Hence, the focus of the recommendations is in developing the West Coast to better cater for this important tourism theme.

Vision

In establishing a vision for walking tourism in West Cork's West Coast, it is imperative to recognise why visitors would find walking in this area rewarding; namely to explore and discover the key features of the West Coast as an outstanding natural landscape. This is the key premise behind the following vision statement for maximising the benefits of walking tourism to West Cork's West Coast:

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

Through this vision, the West Coast will achieve greater recognition as being a walking tourism destination that in turn will deliver new markets, support new products, and present further economic opportunities.

Pillars for Growth

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

- Maximise the inherent value presented by the outstanding natural landscape of West Cork's West Coast and its hinterlands.
 - *Use the outstanding natural character as the principal image for the West Coast, inviting visitors to explore by walking.*
 - *Ensure that the quality of the natural environment is retained and conserved.*
 - *Ensure that the design of the walking trails and any associated furniture is sympathetic to the landscape.*
 - *Promote a 'Leave no Trace' philosophy amongst walkers using the trails.*

- Strengthen the existing support for walking tourism by tailoring existing services and providers to better cater for the different walking tourism markets.
 - *Engage communities in Fáilte Ireland's 'Walkers Welcome' initiative.*
 - *Establish the key towns and villages as the trail access points.*
 - *Ensure that each of the principal walking trails fulfils the existing 'Management Standards' and future 'International Standards' as defined by the NTO.*
 - *Improve the segmentation of the principal walking trails.*
 - *Develop the challenges/themes associated with other (looped) walks.*
 - *Raise awareness of the trained 'Walking Guides'.*
- Build capacity for walking tourism by developing new provision that will better present the West Coast destination as a place for walking.
 - *Encourage 'walker friendly' transport connections from international gateways.*
 - *Improve local transport services facilitating the principal walking trails.*
 - *Establish a series of new 'walker friendly' accommodation provision at strategic locations.*
 - *Subject to future funding arrangements, look to develop a 'South West Coast Path of Ireland' by creating a new walking trail on the Mizen Peninsula.*
 - *Actively encourage walking/outdoor activity retail at key centres.*
- Build awareness of walking tourism through marketing and promotional messages that will better capture the imagination of different walking tourism markets.
 - *Establish a distinctive 'destination' brand for West Cork's West Coast as a walking/outdoor adventure hub.*
 - *Establish clear marketing and packaging activities for walking at the pre, during and post visit information gathering process.*

Each of these objectives, and the specific actions arising from them, are discussed in more in the Stage B report.

Targeting Benefits from Walking Tourism

A principal focus of this study has been to identify the benefits of walking tourism and to ensure that they are being maximised to support the continuing welfare of the economy, environment and community of West Cork.

To confirm, it is estimated that walking tourism at present generates €14 million for the economy of West Cork's West Coast, supporting an estimated 353 Full time Equivalent (FTE) jobs. By delivering against the key objectives identified through the investigation process, it is estimated that this could be significantly enhanced to nearly €22 million by 2016.

In other words, by continuing the walking trails in the West Coast, tailoring services around them, building some modest new capacity, and ensuring that the area is marketed sufficiently, it can be estimated that the value of walking tourism could increase by nearly €8 million per annum in net expenditure in a relatively short time period. This in turn would support and create new jobs for nearly 200 FTE positions.



Economic Benefits

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

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

A key function of the WCDP and its partners will be in providing an economic environment within which these benefits can be realised. In some instances, this may be through direct intervention such as supporting improvements to existing accommodation, developments in new accommodation projects, the bag carriage service, or potentially encouraging local transport services. For others, such as retail and catering, the main intervention will be in helping enterprises to recognise walkers as an opportunity and in ensuring, through marketing and other activities, that the walking market is a visible presence within the key towns in particular.

Overall Conclusion

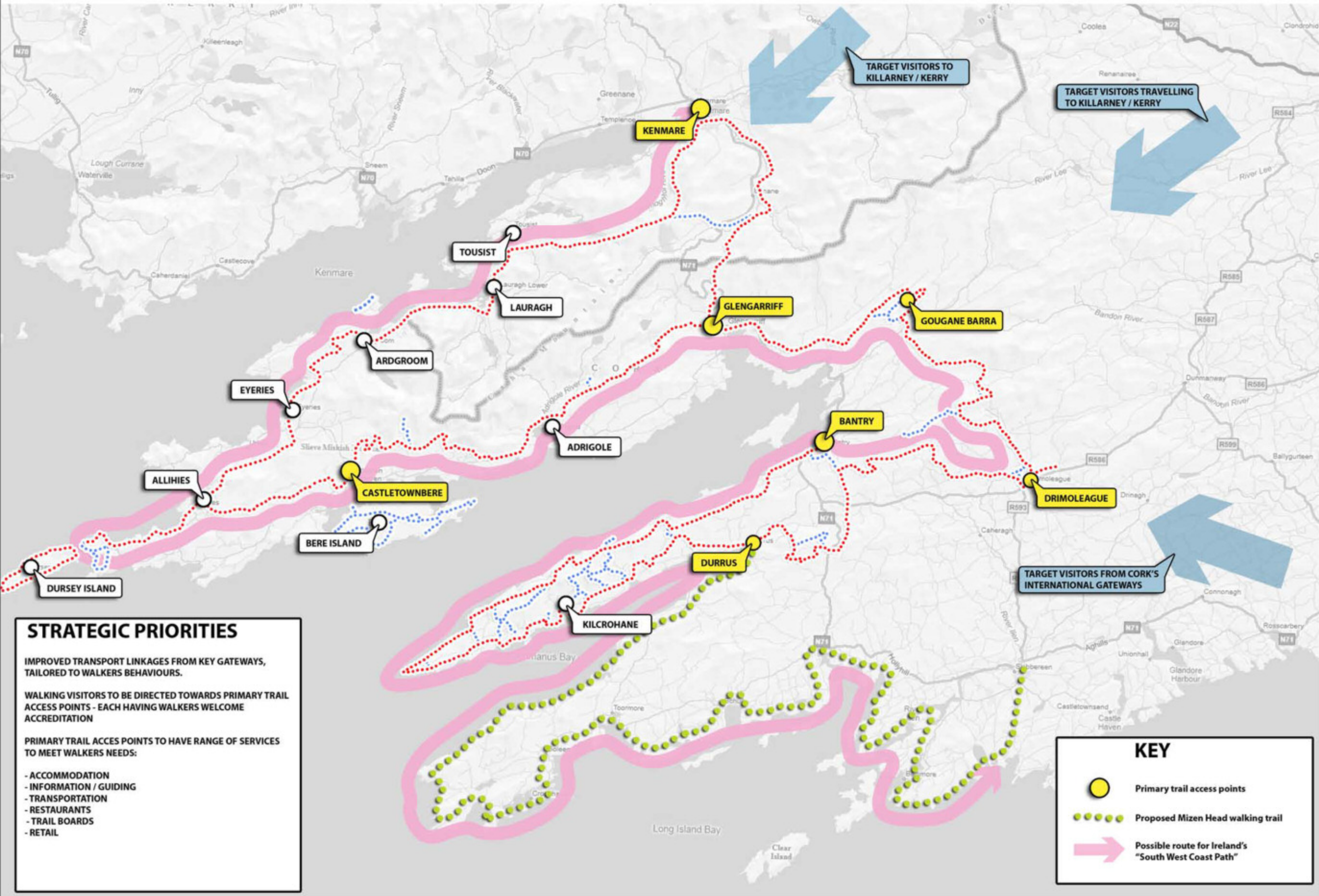
West Cork's West Coast has the attributes required to be presented as an important walking tourism (and outdoor activities hub) to support both domestic and overseas visitors. The foundations, principally the three long distance walking routes, National Looped Trails and other local walks, have already been laid, largely driven from a community base and with the support of different national and regional agencies. This in turn is delivering somewhere around €14 million per annum to the local economy at present.

However, and in comparison with other landscapes of outstanding natural character nationally and internationally, the West Coast at present does not feature as strongly in terms of outdoor activities, including walking. Image, awareness and profile are critical to this end. Hence a key conclusion and recommendation is to establish a clear identity, image and supporting messages for the West Coast that will allow enthusiasts to simply and quickly understand how the facilities and services of the West Coast can be tailored to meet their needs as a walker; regardless of whether they are beginners, general wanderers or enthusiasts.

The purpose of each of the recommendations as highlighted is to ensure that this is being achieved for walking (see Figure's 1, 2, 3 and 4 for a graphic illustration). By targeting the product and marketing towards their specific behaviours and needs, it is possible to envisage the West Coast of West Cork becoming a popular walking tourism destination for both national and international walking enthusiasts.



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STRATEGIC PRIORITIES

IMPROVED TRANSPORT LINKAGES FROM KEY GATEWAYS, TAILORED TO WALKERS BEHAVIOURS.

WALKING VISITORS TO BE DIRECTED TOWARDS PRIMARY TRAIL ACCESS POINTS - EACH HAVING WALKERS WELCOME ACCREDITATION

PRIMARY TRAIL ACCESS POINTS TO HAVE RANGE OF SERVICES TO MEET WALKERS NEEDS:

- ACCOMMODATION
- INFORMATION / GUIDING
- TRANSPORTATION
- RESTAURANTS
- TRAIL BOARDS
- RETAIL

KEY

- Primary trail access points
- Proposed Mizen Head walking trail
- Possible route for Ireland's "South West Coast Path"

NOTES

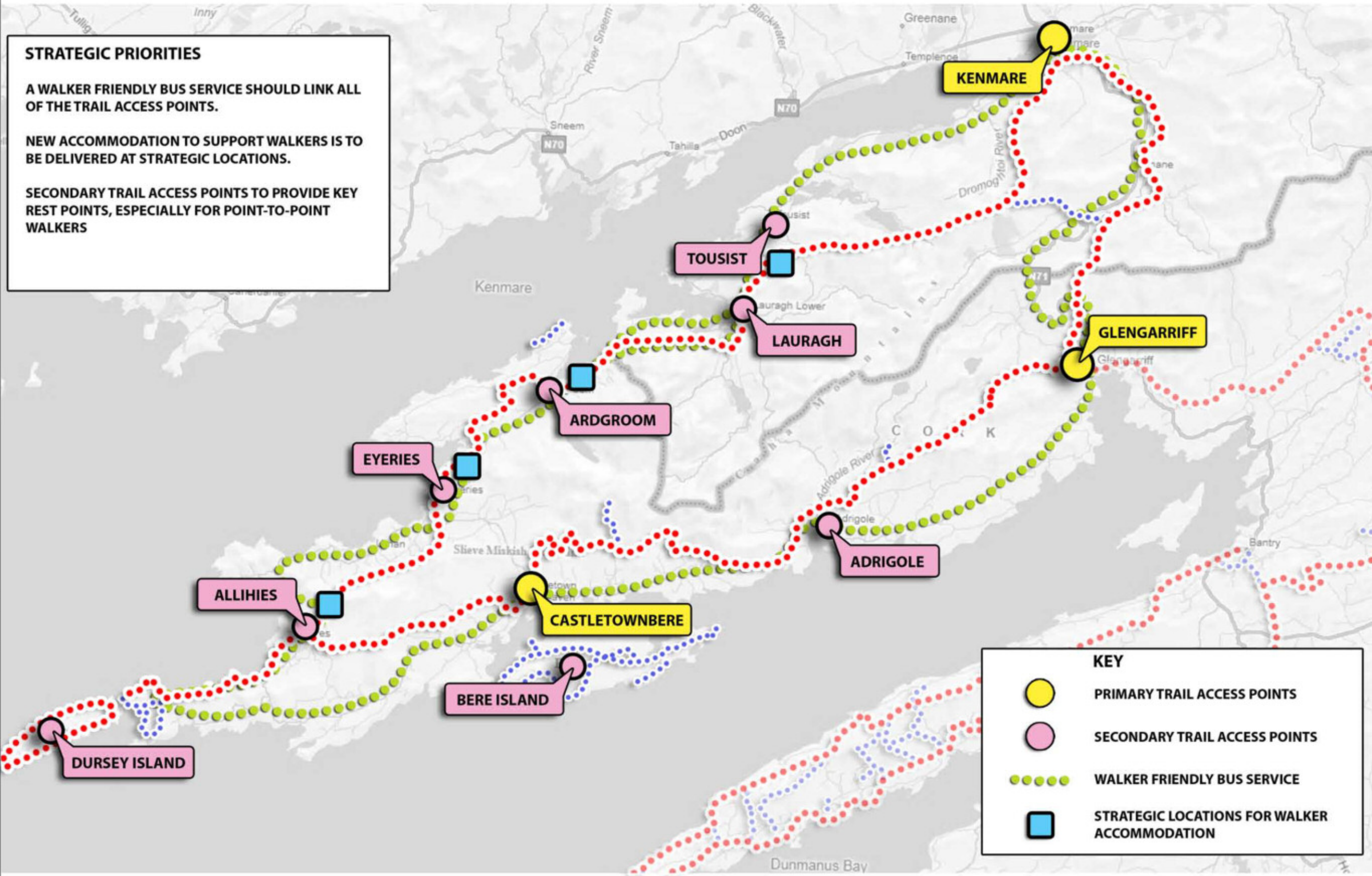
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Drawing Status	DRAFT		
Job Title	WEST CORK WALKING TOURISM		
Drawing Title	BUILDING WALKING CAPACITY IN WEST CORK'S WEST COAST		
Scale at A3			
Drawn	AT	Approved	BW
Stage 1 check	Stage 2 check	Originated	Date
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Figure 1			

STRATEGIC PRIORITIES

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

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

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



KEY

- PRIMARY TRAIL ACCESS POINTS
- SECONDARY TRAIL ACCESS POINTS
- WALKER FRIENDLY BUS SERVICE
- STRATEGIC LOCATIONS FOR WALKER ACCOMMODATION

NOTES

Revision Details	By	Date	Suffix

Drawing Status: **DRAFT**

Job Title: **WEST CORK WALKING TOURISM**

Drawing Title: **BUILDING WALKING CAPACITY ON THE BEARA WAY**

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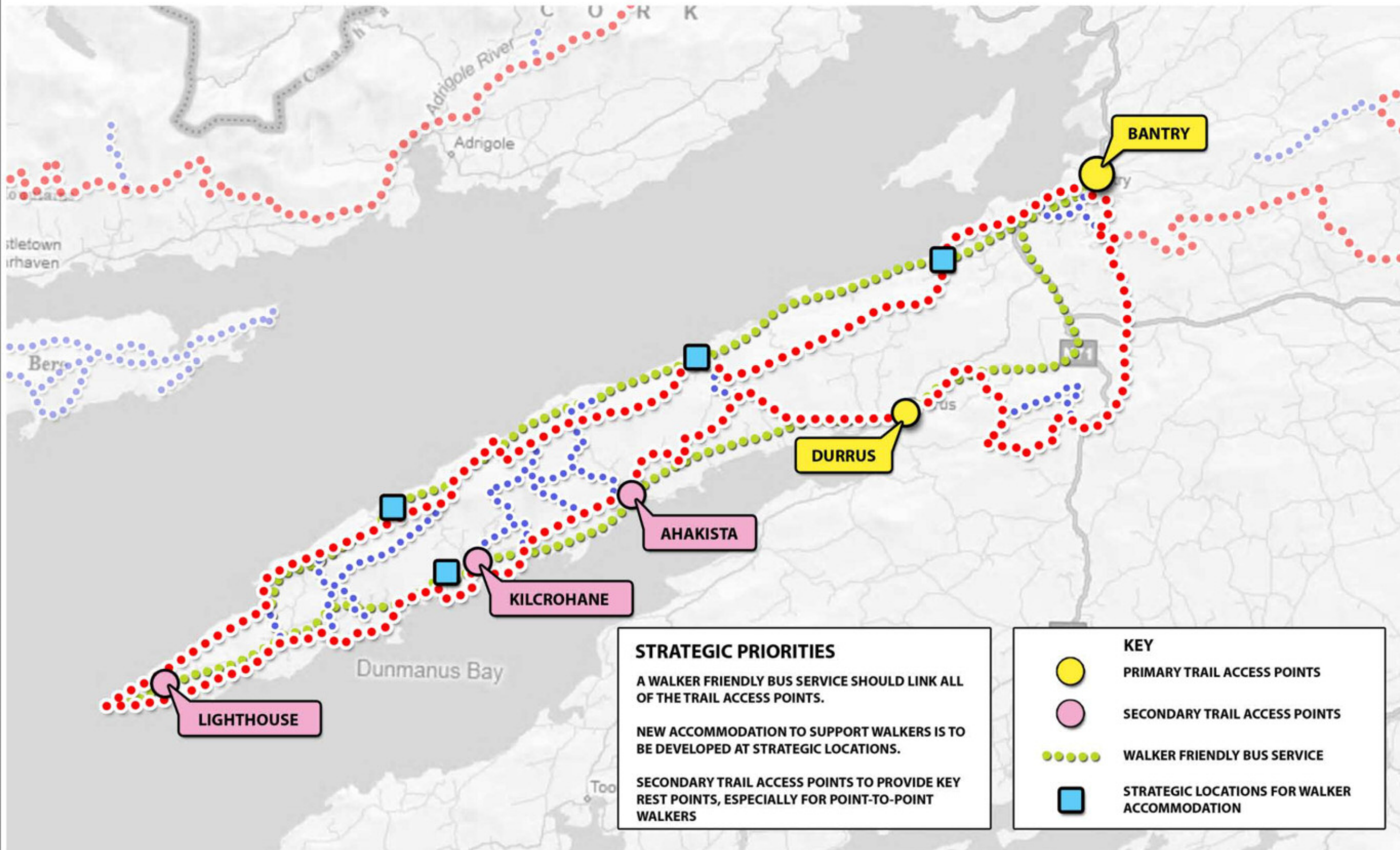
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Figure 2

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Revision Details	By	Date	Drawn
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Drawing Status: **DRAFT**

Job Title: **WEST CORK WALKING TOURISM**

Drawing Title: **BUILDING WALKING CAPACITY ON THE SHEEPS HEAD WAY**

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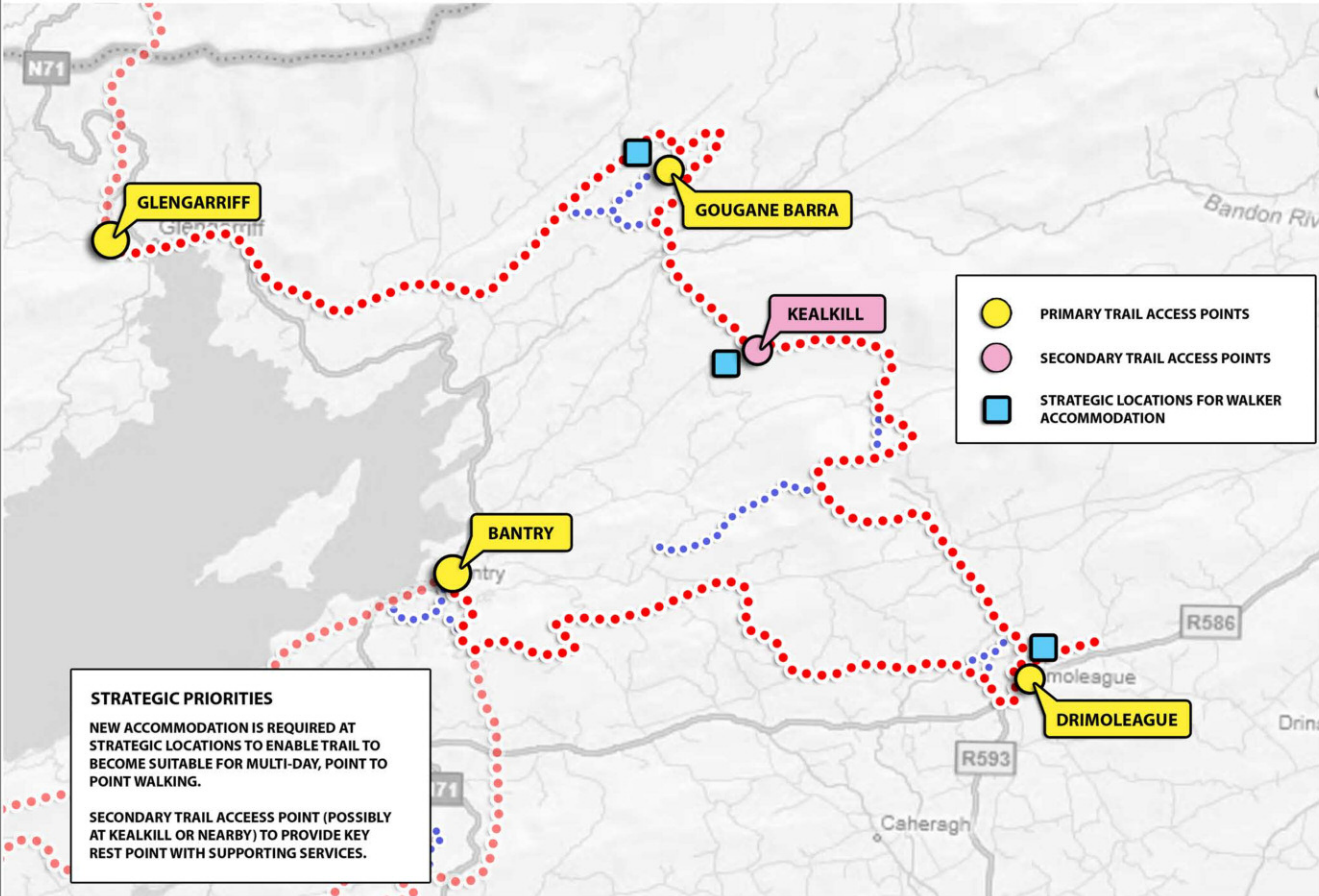
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Figure 3

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	PRIMARY TRAIL ACCESS POINTS
	SECONDARY TRAIL ACCESS POINTS
	STRATEGIC LOCATIONS FOR WALKER ACCOMMODATION

STRATEGIC PRIORITIES

NEW ACCOMMODATION IS REQUIRED AT STRATEGIC LOCATIONS TO ENABLE TRAIL TO BECOME SUITABLE FOR MULTI-DAY, POINT TO POINT WALKING.

SECONDARY TRAIL ACCESS POINT (POSSIBLY AT KEALKILL OR NEARBY) TO PROVIDE KEY REST POINT WITH SUPPORTING SERVICES.

NOTES

Revision Details	By	Date	Suffix
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Drawing Status: **DRAFT**

Job Title: **WEST CORK WALKING TOURISM**

Drawing Title: **BUILDING WALKING CAPACITY ON THE PILGRIMS WAY**

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