



An Opportunity Study for the Copper Coast 2020-2024



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Executive Summary

This Opportunity Study appraises the current baseline and context for tourism, recreation and amenity development in the Copper Coast area of County Waterford. The area, located within easy reach of Cork and Waterford cities, is endowed with a rich geological and heritage legacy and a wealth of environmental features and resources. This is reflected in the designation of the area as a UNESCO Global Geopark in 2015. The area also has a notable track record in innovative community-led social, economic and environmental development. There is, however, an appreciation that the Copper Coast must sustain itself, innovate and continue to develop amid an ever-changing, dynamic and oft-challenging context. To do this, it must build resilience, scale and reach in order to capitalise on exciting new tourism opportunities while also addressing wider challenges and concerns for liveability and sustainability.

The Opportunity Study assesses and takes full account of the national tourism development context and emerging trends as well as the current and future resources and opportunities for Waterford City and County and the Southern region more generally. It is shaped by a clear knowledge and understanding of the tourism industry but also the demographic, social, economic, environmental and technological context within which it operates. Consideration of such factors has shaped consultation with local stakeholders as has the requirement to align suggested development actions to established policy, development strategies and funding programmes. The study takes as its starting point the area's unique cultural identity, its innovative social, economic and environmental development and combines this with established *best practice* and emergent ideas and concepts to deliver sustainable, future-oriented place-based development. It should be viewed as a framework through which community-led actions can be planned and implemented; being strategic in focus but adaptable to new realities and opportunities likely to emerge over the medium term.

The Opportunity Study proposes 11 development objectives and identifies 40 individual development actions and initiatives categorised under 5 distinct pillars; ***advocacy & representation, product development, placemaking, environmental management, marketing and promotion***. While much of the knowledge and skill needed for project planning and implementation is embedded in the Copper Coast itself, the wider community and other stakeholders including development agencies must be engaged, empowered and resourced to lead and facilitate development and change. Effective collaboration, at all levels, is essential. As is always the case, development initiatives that are well planned, resourced, scalable and collaborative offer the best path to tourism vibrancy, social wellbeing, *quality of place* and environmental sustainability. The study concludes by identifying the key enablers – agencies, organisations and sectoral interests – whose commitment, engagement and resources remain central to the Copper Coast's future development. A particular emphasis has been placed on the priorities and opportunities outlined in the *Ireland 2040 Study*, its funding support measures as well as on other public and private resources, incentives and funds.

Acknowledgements

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Prescience Business and Management Development Ltd would like to acknowledge the active contribution of the many organisations and individuals in the Copper Coast, the wider Waterford region and beyond, whom throughout the process, gave willingly of their time and who shared their perspectives, ideals and ambitions.

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Front Cover: Ballydowane Cove, Bunmahon, County Waterford, Ireland George Munday/Alamy Stock Photo

1. Methodology & Process

In the preparation of the Copper Coast Opportunity Study (CCOS) and in the selection and prioritisation of its objectives and development actions, particular care was taken to:

- Build upon strategic planning, developmental and stakeholder management initiatives including but not limited to those of Waterford City and County Council, Fáilte Ireland, FLAG South East, Waterford LEADER Partnership as well as the tourism industry itself and the wider local community.
- Ensure stakeholder engagement, shared ownership and commitment to the CCOS and its future delivery, in particular emphasising the requirement to engage with and collaborate with regional initiatives and partnerships; the objective being the best use of scarce resources and the potential to build scale and leverage greater outcome and impact.
- Establish a clear understanding of and context for the future social, economic and environmental development of the Copper Coast.
- Identify local needs and aspirations and align these with those of policy makers, development organisations and funders, highlighting the importance of relevant EU, national, regional, sectoral and local development policies, plans and strategies (see appendix 1). Particular attention has been paid to the enabling national and local development supports detailed in ***Project Ireland 2040 plan*** and ***the National Planning Framework***.
- Establish a baseline through the use of accurate, relevant and up to date demographic and economic data based on Census 2016 and other official data sources.
- Evaluate the principal drivers and trends (*demographic, behavioural, political, cultural, technological, economic and environmental*) likely to shape short-medium term change in the social, economic, fabric of the South East region and Waterford in particular.
- Prioritise the principle of sustainability; for the purposes of this study being defined as the optimal balance and integration of social, economic and environmental assets and resources.
- Identify key challenges and opportunities and present feasible, time-bound actions to optimise local strengths and mitigate weaknesses.
- Consult extensively with stakeholders central to the social, economic and environmental development of the Copper Coast and its communities.

The planning and development of the CCOS was based upon five discrete but inter-related stages as follows:

Figure 1: Methodology & Process



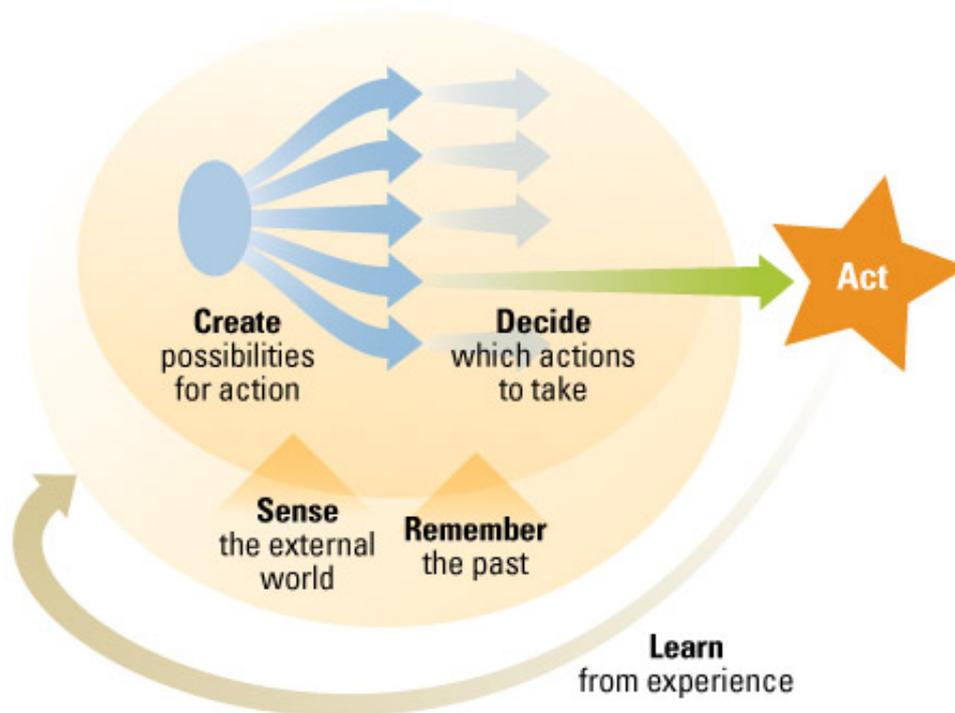
The *Engage* and *Facilitate* stages of the process reflect extensive stakeholder input and consultation. This was enabled throughout the preparation and development of the study by individual one-to-one meetings; sponsor and agency liaison meetings as well as through an online survey (see appendix 2). The context for stakeholder consultation was been framed through 16 key questions as follows:

Figure 2: 16 key stakeholder questions

Where are we?	What are our attributes ?	What are our social, economic & environmental assets?	What's the operating context?
How is this changing?	What's working for us and what isn't?	What can we do better?	What's happening in the market?
Are our objectives and actions defined?	Do we have an enabling strategy and action plan?	Are our resources aligned to this?	What additional resources and support is needed?
Who will champion and support our efforts?	Can we deliver scale and impact through collaboration?	What might success look like?	How will we measure it?

These questions, the issues they have raised, allied to extensive desk research and the use of primary and secondary research have fully informed the *Review, Develop* and *Report* stages of this study. The CCOS has also been shaped through knowledge and understanding gained in the delivery of strategic planning and development supports by **Prescience Business And Management Development Ltd** in the Copper Coast area, County Waterford and the wider South east region throughout 2018 and 2019.

Figure 3: Strategy Logic Model



Between September 5th and October 31st 2019 a confidential online survey was circulated amongst stakeholder interests in the area; each of whom was considered as being active in, reliant on or supportive of tourism development in the area. The qualitative sample size was determined by the study objectives, local tourism scale and intensity as well as the time and resources available. The online survey was closed at the point at which saturation occurred i.e. the survey no longer yielded additional perspectives or information. Detailed feedback and qualitative analysis was sourced from 21 respondents; for the most part representative or interest groups reflecting wider community, economic and environmental interests. Observations, comments and suggestions offered by respondents to the survey and in direct one-to-one or group engagement have been analysed and have determined the objectives and development actions throughout this study.

2. Development and Policy Context

2.1 The National Planning Framework

Social and economic development in the Copper Coast will be profoundly influenced by policies, strategies and resources shaped by the *Ireland 2040 Plan* and the *National Planning Framework (NPF)*. This plans for an increase in population of 1m people in the period to 2040, of which 380,000 are likely to reside in the Southern region thus bringing its total population to 2m. It envisages that 70% of the predicted population growth will occur outside Dublin with second tier cities such as Cork and Waterford growing by 50% to become *cities of scale*. Population growth in small towns and rural areas throughout the Country is targeted to an average of 15% by 2040.

The NPF adopts a *whole of government* approach to the attainment of 10 National Strategic Outcomes¹ and is explicit on a range of development objectives, policies, supports and resources relevant to the development of tourism in the Copper Coast area. These include, but are not limited to:

- Protection and promotion of a sense of place and culture as well as the quality, character and distinctiveness of the Irish rural landscape that make Ireland's rural areas authentic and attractive as places to live, work and visit.
- Targeting rural decline in small towns and villages through sustainable targeted reuse and regeneration initiatives.
- Enhancing, integrating and protecting the special physical, social, economic and cultural value of built heritage assets through appropriate and sensitive use now and for future generations.
- Supporting the proportionate growth of and appropriately designed development in rural towns that will contribute to their regeneration and renewal, including interventions in the public realm, the provision of amenities, the acquisition of sites and the provision of services.
- Enhancing the competitiveness of rural areas by supporting innovation in rural economic development and enterprise through the diversification of the rural economy into new sectors and services, including ICT-enabled industries and those addressing climate change and sustainability.
- Facilitating tourism development and in particular a *National Greenways, Blueways and Peatways Strategy*, which prioritises projects on the basis of achieving maximum impact and

¹ Compact Growth; Sustainable Mobility; Enhanced Regional Accessibility; A Strong Economy, supported by Enterprise, Innovation and Skills; Strengthened Rural Economies and Communities; High-Quality International Connectivity; Enhanced Amenities and Heritage; Sustainable Management of Water, Waste and other Environmental Resources; Transition to a Low Carbon and Climate Resilient Society; Access to Quality Childcare, Education and Health Services

connectivity at national and regional level.

- Facilitating the development of the rural economy through a sustainable and economically efficient agricultural and food sector, together with forestry, fishing and aquaculture, energy and extractive industries, the bio-economy and diversification into alternative on-farm and off-farm activities, while at the same time noting the importance of maintaining and protecting the natural landscape and built heritage which are vital to rural tourism.
- Supporting and facilitating delivery of the National Broadband Plan as a means of developing further opportunities for enterprise, employment, education, innovation and skills development for those who live and work in rural areas.
- Ensuring that Ireland's coastal resource is managed to sustain its physical character and environmental quality.
- Ensuring that development occurs within environmental limits, having regard to the requirements of all relevant environmental legislation and the sustainable management of our natural capital.
- Enhancing the conservation status and improving the management of protected areas and species by implementing relevant EU Directives to protect Ireland's environment and wildlife and developing and utilising licensing and consent systems to facilitate sustainable activities within *Natura 2000* sites.
- Conserving and enhancing the rich qualities of natural and cultural heritage of Ireland in a manner appropriate to their significance.

In line with its objective for balanced development and compact growth, the NPF has a major new policy emphasis on renewing and developing existing settlements. To a significant extent, it is expected that this increased population will concentrate in the urban centres of Cork and Waterford; the former to reach a population of 315,000, the latter to reach a population of 85,000, almost double current levels. It targets at least 40% of all new housing to be delivered within existing urban areas or on infill and/or brownfield sites; an inevitable consequence of which will be the concentration of population growth within developed or developing urban settlements. Of particular relevance to the development of the Copper Coast area are the Plan's objectives to:

- Target a level of growth in the Southern Region to match that projected in the *East and Midland* Region.
- Improve inter-urban access between the cities of Cork, Limerick, Galway and Waterford.

- Enable through a *Regional Spatial and Economic Strategy* (RSES) the development of urban regional centres as loci for population and employment growth.
- Support growth targets to enable the population of Cork and Waterford cities to grow by at least 50% to 2040 enhancing their potential to become *cities of scale*.
- Enable Cork and Waterford cities to be regional drivers and to lead and partner in regional/inter-regional networks to offset Dublin-centric growth.
- Focus investment to improve the collective *offer* within Cork and Waterford cities i.e. infrastructure, quality of life and choice in terms of housing, employment and amenities.
- Reverse rural decline, by encouraging new roles and functions for buildings, streets and sites within town and village settlements.
- Support the sustainable growth of rural communities, to include continued economic and community development in rural areas.
- Improve local connectivity through upgrades to communication, broadband, energy, transport and water networks.
- Promote new economic opportunities in the tourism, food and environmental sectors arising from digital connectivity and indigenous innovation and enterprise as well as further development from traditional natural resources and assets.
- Improve use of under utilised land and buildings, including *infill*, *brownfield* and *publicly owned* sites and vacant and under-occupied buildings, with higher housing and jobs densities, better serviced by existing facilities and public transport.
- Improve international connectivity via Cork airport, Ringaskiddy and Rosslare ports.
- Support urban regeneration and rural rejuvenation through a €3Bn *Regeneration and Development Fund* for urban and rural areas.

The NPF anticipates that Cork City will anchor growth in the Southern region while Waterford City will lead the development of the wider south-east; a region comprised of the counties of Waterford, Wexford, Kilkenny, South Tipperary and Carlow which has experienced slower economic recovery than others in recent years. A driver of growth in the city is expected to be the 8 hectare [North Quays Strategic Development Zone](#); a €300m contract for the development of which was signed in 2018

between Waterford City and County Council (WCCC) and the Saudi-led consortium Fawaz Alhokair Group. Incorporating mixed residential and commercial uses including hotel and other tourist facilities the development also seeks to repurpose a transport interchange facility incorporating a fully enclosed facility for walkers, cyclists and train, bus and car users. This combination of pedestrian bridge, green route, train and bus services will be unique in Ireland allowing for enhanced access and near optimal inter-modal connectivity. Facilities to accommodate the burgeoning cruise line trade to the city may also be incorporated into the development.

The *Regional Spatial & Economic Strategy (RSES)* establishes an overall strategy for the development of the Southern region built around its cities and surrounding metropolitan area. City scale is deemed a key strength for the overall development of the Southern region supplemented by designated centres such as Dungarvan fulfilling a strategic role in ensuring the consolidation and spread of growth beyond the metropolitan areas. Given their importance of each settlement to the strategic development of the Southern region, the RSES has established clear objectives and infrastructural requirements for each. *Placemaking; regeneration; smart specialisation; rural development; digital connectivity, environmental excellence; biodiversity; low carbon economy; tourism; maritime economy; ecosystem services; quality of life and wellbeing; green infrastructure and resource efficiency* are embedded as key priorities in the RSES.

2.2 The County Context

WCCC is responsible for delivering a broad range of services including roads, planning, housing, as well as economic and community development, environment, recreation and amenity services throughout the County. Through its planning and development functions, it has a key role to play in the development of rural areas and in directly facilitating and supporting community and economic development. Its strategic priorities for economic, environmental and social development are set out in the County Development Plan 2011-2017 and include many of direct relevance to the development of tourism, recreation and amenity in the Copper Coast. These include, but are not limited to:

- To continue building on the strengths of the County, giving priority to sustainably developing the tourism product, festivals and events and to consolidate the retail, hospitality and tourism sectors in County Waterford.
- To encourage new investment in the tourism sector with specific reference to accommodation in terms of choice, location and quality of product.
- To work with community groups and the private sector to raise the profile of County Waterford as a place to visit using e-commerce, national and international media.
- To facilitate, where possible, the work of Fáilte Ireland (FI) in any analysis of the tourism

activity/sector of County Waterford.

- To facilitate the expansion of tourist activities in appropriate locations where they can be supported by, and provide support for, existing communities. In all cases, development will be required to comply with key sustainable tourism and environmental principles and the development management standards.
- To promote and facilitate, where possible, the provision of high quality walking and cycling routes in Waterford and to promote Waterford as the “*Walking Capital of Ireland.*”
- To support the protection and sustainable development of coastal walkways in the interest of providing access to coastal heritage and scenic landscapes.
- To facilitate, as the opportunities arise, the sustainable development/enhancement of tourist trails and designated walking and cycling trails that do not cause landscape or environmental degradation throughout County Waterford. The Council shall also encourage the development of off-road cycling at appropriate locations.
- To develop the marine leisure sector of the County in a coherent and sustainable manner, including the development of marinas, water sport based activities, improvement of quays and slipways and enhanced interpretation and safety that does not cause landscape or environmental degradation and avoids adverse effects on the designated sites in the area.
- To protect and enhance County Waterford architectural and cultural heritage as a strong tourism product in a sustainable manner.
- To identify and develop visitor trails where appropriate to promote the landscape heritage, demesnes and great gardens open to the public and promoting appropriate accessible sites of industrial heritage in the County.
- To retain and protect the unique architectural heritage of villages and towns in the County.

2.3 Key Support Agencies

WCCC has the principal responsibility and function in promoting and supporting economic and community development throughout the City and County. It does so directly through its mandated functions but also in tandem with a number of other organisations and committees. The Waterford Local Community Development Committee (LCDC) plays a central role in planning and coordinating development activity within the County and throughout its sub regions. Its work is guided by the *Local Economic and Community Plan 2015-2020 (LECP)* which among a range of objectives and development priorities has set a high level objective “*to accelerate the growth of the tourism economy*” and to “*develop communities of place*”.

Fáilte Ireland (FI) is the National Tourism Development Authority whose role is to support the tourism industry and work to sustain Ireland as a high-quality and competitive tourism destination. It provides an impressive range of practical business and financial supports to help tourism businesses better manage and market their products and services in domestic and overseas markets. Working in tandem with industry and other partners it facilitates, coordinates and manages promotional initiatives and campaigns through events and digital platforms. It also supports a network of nationwide tourist information centres that provide guidance and advice for visitors to Ireland. In a local context its development focus is aligned to the development and promotion of the *Ireland's Ancient East* Signature Experience Brand.

Waterford LEADER Partnership (WLP), a community-led local development initiative of longstanding, supports economic and community development throughout the County. In tandem with the LCDC, it plans and implements a range of EU and national development programmes such as the LEADER programme, recreation, employment activation and social inclusion initiatives. The Local Development Strategy (LDS) for the period 2014-2020 sets out an enabling framework and provides resources for economic and community development which anticipate the development of new niche tourism products, particularly activity and sports tourism, marine activities, cultural, and heritage tourism.

Operating across the Counties of Wicklow, Wexford and Waterford, the *Fisheries Local Action Group (FLAG) South East* is one of 7 EU community-led initiatives throughout the country that seeks to support economic and community development in coastal and fisheries dependent communities. Specific tourism objectives include the development of marine tourism infrastructure (piers, pontoons, moorings, ancillary facilities, utilities, etc); the development of the marine tourism offering (blueways, walks, cycle and touring routes, trails, eco-tourism, festivals, etc) and the marketing of the coastal tourism product (signage, information, networks, clusters, etc).

The *Waterford Sports Partnership (WSP)* is one of a network of Local Sports Partnerships developed through the Irish Sports Council (ISC). Its' primary focus is the creation and implementation of plans for long term local sports development; the development of structures, networks and events. It works in collaboration with sporting, community, voluntary and statutory partners to plan, co-ordinate, develop and evaluate sustainable opportunities for the people of Waterford to enjoy the health benefits of participation in sport and physical activity.

3. Tourism: Economic Value, Importance & Impact

3.1 An overview of Tourism in 2018

The tourism industry supports 325,000² jobs on the Island of Ireland and is now worth an estimated €9.2bn³ to the national economy. While it is evident that urban areas find particular appeal with visitors, tourism has a pronounced distributive effect to the regions, notably contributing to the economic viability and sustainability of many peripheral rural areas. In 2018, 10.6m overseas visitors travelled to Ireland, generating revenues of €6.8bn. This represents a 6.9% increase on visitor numbers and a 6% increase in revenues on 2017; heretofore a record year for Irish tourism. Overseas travellers to Ireland spent a total of 72.4m nights in the country in 2018, an increase of 3.7% on 2017; 30.8m nights accounted for by visitors from *Mainland Europe*, 16.4m nights from visitors from *Britain*, 16m nights from *North American* Visitors and 9.1m nights from the *Rest of the World*⁴.

For clarity, it should be noted that the definitions of *Visitor*, *Tourist* and *Holidaymaker* each have very specific meanings. A *Visitor* is defined as a traveller taking a trip to a destination outside their usual environment, for less than a year, for any purpose other than to be employed by a resident entity in the place visited. A *Tourist* is defined as visitor whose trip includes an overnight stay. A *Holidaymaker* is defined as a tourist whose main reason for travelling is holiday, leisure or recreation. In 2018, *Mainland Europe* accounted for 40% of all Holidaymakers, *North America* 28% and *Britain* for 26%.

In 2018, the key overseas source markets for Irish Tourism were:

Table 1: Source Markets Overseas Tourists to Ireland 2018

Source Market	2017	2018	% Change
Britain	3,729,000	3,759,000	0.8
North America	2,102,000	2,384,000	13.4
Mainland Europe	3,482,000	3,813,000	9.5
- France	549,000	565,000	2.8
- Germany	681,000	818,000	20.0
- Italy	363,000	409,000	12.6
- Spain	443,000	443,000	-

² www.gov.ie/en/organisation/department-of-transport-tourism-and-sport/

³ Irish Tourism Industry Confederation, 2018

⁴ CSO, 2019

All Other Europe	1,445,000	1,578,000	9.2
Other Areas	619,000	661,000	6.7
- Australia/New Z	209,000	228,000	9.4
- Other Long Haul	411,000	432,000	5.2
Total Overseas	9,932,000	10,616,000	6.9

Source CSO, 2019

Tourism markets in *North America, Mainland Europe* and *the Asian Pacific* continued to exhibit strong growth demonstrating the success of overseas promotional initiatives and a clear understanding of and appeal to targeted tourism segments and their interests. The growth in these markets has offset the weakening of the *British* market, traditionally the largest overseas market for Irish tourism. Tourism expenditure per person per day for overseas *Holidaymakers* is estimated to be €94; for *Overseas Tourists* €72 and *Domestic* overnight trips €71. Research conducted by *Behaviour and Attitude* in 2017 suggest that expenditure on tourism marketing yields exceptionally strong returns; each €1 spent on overseas promotional activity generated a return of €41 for the Irish economy. The *World Economic Forum* lauds Ireland as being the 3rd most effective country globally “*in its effectiveness of branding and marketing to attract tourists*”.

In 2018, the principal activities favoured by overseas tourists included *Hiking and Walking* (2,600,000), *Cycling* (504,000), *Golf* (221,000), *Angling* (146,000) and *Equestrian* (126,000). The tourism industry itself offers some useful insights⁵ for the strong performance in Irish Tourism in 2018. When prompted, the principal factors identified include repeat visitors (64%), own marketing (51%), own investment in business (45%), the Wild Atlantic Way (43%), the buoyancy of domestic tourism (40%), festivals and events (38%), perceptions of safety (37%), improved overseas access (29%), marketing by tourism agencies (26%) and improved local visitor attractions (24%).

In 2018, Irish residents took 10.9m trips within Ireland spending €2bn, demonstrating strong year on year visitor number and revenue growth since 2014. FI research⁶ indicates that 59% of the population took a domestic holiday in 2018; 55% doing so for a duration of between 1 and 3 nights. Hotel accommodation accounted for 37% of all overnight trips with an average of length of stay of 2.5 nights per trip. The activities most favoured by domestic holidaymakers include *Walking & Hiking* (26%); *National Parks* (21%); *House and Castles* (21%); *Watersports* (20%); *Spa Visits* (17%); *Festivals & Events* (17%); *Gardens* (17%); *Heritage & Interpretative Centres* (15%); *Monuments & Antiquities* (12%); *Museums & Galleries* (11%); *Sporting Events* (9%); *Cycling* (8%); *Golf* (5%); *Horse Racing* (2%) and

⁵ Tourism Barometer; Fáilte Ireland; 2018

⁶ Fáilte Ireland Domestic Holiday Monitor 2019

Angling (2%). The period July to September accounted for 35% of short trips (1-3 nights) and 68% of longer trips (4+ nights)⁷. Satisfaction ratings remain high although concerns are voiced about the weather and the cost of accommodation and food

Direct employment in ‘*Accommodation and Food Service Activities*’, a category that includes hotels, restaurants, bars, canteens and catering was 181,200 in 2018, comprising 8% of all employment⁸. When employment in ‘*Tourism Services and Attractions*’ is added total employment in the sector is believed to be 260,000 or 10% of all employment. Nationally, it is estimated that for every €1m of tourist expenditure 27 tourism jobs are supported; for every 1,000 additional overseas tourists 20 tourism jobs are supported and that 22c of every euro spent on domestic and overseas tourism returns to the national exchequer in taxation, an amount totalling €1.7bn or €1,000 per household. While allowing for some variations in source markets, the expenditure split by overseas visitors on 1) *Accommodation*; 2) *Food and Beverage*; 3) *Sightseeing, Shopping, Entertainment and Transport* is roughly a third each.

3.2 Consumer Sentiment & Satisfaction Ratings

Data from FI’s annual overseas visitor’s survey⁹ shows that slightly more than half of overseas holidaymakers found Ireland good or very good value for money in 2018. In general satisfaction ratings remain high with nearly two thirds of holidaymakers confirming that their holiday matched expectations, the remainder significantly believing that the holiday exceeded expectations. Positive sentiment is also reflected in the 71% of overseas holiday makers that would “*definitely recommend Ireland for a holiday*” and the 25% of overseas holidaymakers suggesting a “*return to Ireland within the year*”. The research affirms key motivations held by overseas holidaymakers for their visit to Ireland, central to which are Ireland’s unique scenery (93%); the friendliness of the people (88%) and natural attractions (88%). The full range of motivating factors and satisfaction rates with each are as follows:

Table 2: Importance and rating of destination issues among overseas holidaymakers in 2018

Characteristic	% for whom Importance	% of whom satisfied
Beautiful scenery	93	97
Friendly, hospitable people	88	99
Good range of natural attractions	88	95
Safe and secure destination	86	97

⁷ CSO, 2019

⁸ CSO, 2019

⁹ Overseas Holiday Makers Attitudes to Ireland; 2019

Natural and unspoilt environment	86	93
Interesting history and culture	85	95
Attractive cities and towns	81	93
Easy, relaxed pace of life	79	95
Suitable for touring	61	91

3.3 Decision-Making and Product Selection

For overseas visitors, the influence and advice from family, friends and associates (51%) remains a powerful motivator in influencing the choice of Ireland as a holiday destination, though less marked (35%) in the choice of specific locations, accommodation and pursuits. The internet continues to be a powerful tool in the planning (51%) and selection (69%) of holiday choices and pursuits with particular attention paid to travel review sites, carriers and accommodation. For 2018, Tourism Ireland reports that ireland.com had in excess of 20m unique visits. Furthermore, each of its social media channels (Facebook, Twitter & YouTube collectively accounting for 5m followers) each rank #4 worldwide. Guidebooks remain useful for the overseas visitor being a source of inspiration for 23% and a determinant in product selection for 26%. Independent travel, as distinct from packaged holidays, remains the choice for 86% of overseas visitors; however this falls to 77% of North Americans, 23% of who favour a package, defined as “prepaid with an inclusive price for fares to/from Ireland and at least one other element of the holiday”. While tourists are not homogenous, particular characteristics and features predominate amongst holidaymakers to Ireland with regard to frequency of visit, transport used, age social class and composition of travel party.

Table 3: Characteristics of holidaymakers in Ireland in 2018

Experience of Ireland	Use of Car	Age	Social Class	Party Composition
First visit – 67%	Car brought -10%	Under 25 – 22%	Manag/Prof – 28%	Alone – 21%
Repeat visit – 31%	Car hired -33%	25-34- years – 23%	White Collar – 60%	Couple -40%
Irish-born - 1%	Car not used -57%	35-44 years – 12%	Skilled worker –9%	Family – 18%
		45+ years	Unskilled worker – 3%	Adult group – 22%

Source: Fáilte Ireland, Tourism Facts 2018

In 2018, visitor occupancy varied by accommodation type with Hotels ranking highest at 72%, Hostels at 70%, Guesthouses at 66%, Bed & Breakfast at 45%, Self-catering and Caravan and Camping each at 38%.

3.4 Tourism in 2019 to date

The record growth from 2018 has continued into 2019 with the number of nights spent in Ireland by overseas travellers increasing by 5.8% in the period April-June 2019 compared with the same period of the previous year, up from 18.7 million to 19.8 million. In the same period, the average duration of overseas trips to Ireland increased from 6.3 nights to 6.5 nights. Total tourism and travel earnings from overseas travellers to Ireland increased by 2.1% between Q2 2018 and Q2 2019, increasing from €1.97m to €2m. When travel fares are excluded, total expenditure increased from €1.4b to €1.5bn, an increase of 2.6% over the period. Overall, overseas arrivals (which includes transfers and day visitors as well as overnights) to Ireland increased by 2.8% by the end of July 2019. However, these figures warrant scrutiny as they conceal markedly different trends from key source markets, with a decline of 0.5% overall for the month of July 2019 alone. *North America's* heretofore strong growth pattern stalled in July with a decline of 2.7%, while *Mainland Europe* dropped by marginally by 0.7%. The British market saw modest growth of 0.6% for the month, while *Emerging Markets* were up 4.1%. Negative trends were also observed in August 2019 with the total number of *trips to Ireland* by overseas residents decreasing by 1% to 1,190,600 - an overall decrease of 11,500 compared to twelve months earlier. Trips by residents from *Britain* decreased by 2.7% to 393,900 while trips by residents of *European Countries other than Britain* increased by 0.2% to 427,900. Trips by residents from *North America* to Ireland decreased by 1.5% to 282,500 while trips to Ireland from *Other Areas* increased by 3.7% to 86,300.

Table 4: Overseas Arrivals & Holidaymakers to Ireland 2019

Origins	Direct Arrivals January – July 2019	% YOY	Holidaymakers January – July 2019	% YOY
Great Britain	2,149,800	+0.5%	611,000	-3%
Mainland Europe	2,254,500	+2.2%	930,000	-1%
North America	1,404,700	+6.4%	637,000	+9%
Rest of World	394,400	+7.1%	134,000	+6%
Total	6,203,600	+2.8%	2,314,000	+2%

Source: CSO, 2019

In terms of overseas holidaymakers – as distinct from overall overseas visitors - total numbers grew by 2% in the period January to June 2019. However, visitors from *Britain* were down 3% and visitors from *Mainland Europe* down by 1%. By contrast, volumes from *North America* grew by 9%, with *Emerging Markets* up 6%. Revenue from overseas Holidaymakers also grew in the first half of 2019 with a 5% increase in spend when compared to the same period in 2018. While Holidaymaker revenue dropped from *Britain* by 5% and from *Mainland Europe* by 3%, this was more than offset by very strong growth of 16% in holidaymaker revenue from *North American* visitors and by a 3% increase in revenue from *Emerging Markets*¹⁰.

3.5 Ireland's Signature Experience Brands

The reasons for Ireland's continued tourism growth are multi-faceted. A notable success factor has been the development of Signature Experience Brands such as the *Wild Atlantic Way*, *Ireland's Ancient East*, *Dublin City* and the *Hidden Heartlands*; each of which are central to the FI 10 year strategy to drive sustainable growth and deliver optimal economic benefit throughout the country. The strategy seeks to achieve this through:

- Creating unique and inimitable tourism propositions of scale and singularity that appeal to defined consumer markets.
- Improving the regional and seasonal spread of tourists by persuading more tourists to visit areas outside the main regions and attractions and to do so outside seasonal peaks.
- Significantly improving the quality and range of holiday experiences to offer tourists, while maintaining a strong value-for-money position.
- Attracting more tourists from new and existing markets by improving this tourist offering, and building capability and access to these markets.

Defined signature experiences underpin the brand proposition and are regarded as being of a quality, appeal and magnitude to motivate international visitors to Ireland. Generally the experiences, whether story-based, thematic or geographical, will be of a scale that unifies and combines a range of associated or linked experiences with a *hero product* at its core.

3.6 Ireland's Ancient East

Ireland's Ancient East (IAE) is FI's *Signature Experience Brand* for the South East. The brand proposition is based on the rich built, natural and cultural legacy, made accessible and delivered through storytelling and interpretation at key historical sites throughout the region. The brand seeks to

¹⁰ Failte Ireland SOAR Report, September 2019

motivate greater numbers of visitors to holiday and to spend time in the region; one which heretofore has been relatively overlooked. In 2017, the IAE region – stretching across 17 counties - was visited by 44% of overseas visitors but achieved only a 22% share of the total expenditure. However, when figures for Cork City are omitted, the region received only 23% of overseas visitors and 11% of visitor spend. The region is also heavily reliant on the *Domestic Holidaymaker* who spend €230 per capita compared to the *Overseas Tourist* who spend €550 per capita¹¹



FI research has defined the principal target market for the IAE as the [*Culturally Curious*](#); people who are looking for authentic, high-quality experiences that will be memorable and enriching. The *Culturally Curious* visitor wants to be an active participant, rather than a passive spectator and consumer. They want to learn from the places they visit and interact and connect with the people and culture. They want experiences that are special and exist '*only here*'; experiences that create memories they can share with friends, family and through social networks.

To meet these consumer expectations IAE presents a set of unique and authentic stories to differentiate the region from its domestic competition with the objective of repositioning from a transient area to a destination in its own right. Key narratives and themes for IAE storytelling and interpretation particularly relevant to the South East include *Vikings, Castles and Conquests, Tales of Two Worlds, Maritime Gateway, Sacred Ireland and Ancient Ireland*. Each of these themes are elaborated upon and further developed through *Visitor Experience Development Plans* (VEDPs); the vehicle through which FI aligns its own resources and those of its key stakeholders to deliver a commercial development plan that builds capacity and capability; primes demand; and delivers world class visitor experiences within a defined geographic area. Generally speaking, a VEDP will be a 3-5 year development plan for an area anchored by experiences which allow visitors to immerse themselves actively in the destination, interacting with people, engaging the senses, and learning the history and stories of the places. The expected output from the VEDP is a tiered product development pipeline comprising new attractions, activities, festivals events, trails, food offerings, day time/night time experiences, music etc; new saleable experiences; an industry capability plan as well as plans for investment in orientation, infrastructure and the public realm.

¹¹ Fáilte Ireland estimates based on CSO and NISRA surveys.

Figure 4: Defining the Culturally Curious



Culturally Curious

What they are seeking from a holiday in Ireland?

TOWN OR CITY BASE and tour around or explore the area by hiking, walking, biking

Want to learn about IRISH CULTURE, CUSTOMS AND TRADITIONS

HISTORY BROUGHT TO LIFE by local storytelling and re-enactments

AUTHENTIC LOCAL EXPERIENCE

CURIOUS TO EXPLORE Natural landscapes and seascapes, small towns, villages castles, ancient sites and histories houses

WILL HIRE A CAR to travel around

They want to hear the INSIDER PERSPECTIVE through local stories

Seeking QUALITY, FRESH well prepared local food

They seek to venture off the beaten track

Source: Fáilte Ireland

Figure 5: IAE performance 2018



Source: Fáilte Ireland, IAE Project Update No.5

It is believed that growth opportunities provided by current and planned IAE tourism marketing initiatives will further stimulate demand and revenue from both overseas and domestic markets for the South East. In 2018, data provided to FI¹² from the *Paid Service Accommodation (PSA)* sector revealed that the IAE brand performed creditably, though not as strongly as the *Dublin* and *Wild Atlantic Way* brands.

Table 5: Signature Experience Brand Performance 2017 & 2018

Signature Experience Brand	Up on 2017	Same as 2017	Down on 2017
Dublin	69%	26%	5%
Wild Atlantic Way	60%	29%	11%
Ireland's Ancient East*	54%	29%	11%

Source: Tourism Barometer, December 2018 *cited figures do not total 100%

FI's objective is to make IAE the most personally engaging cultural destination in Europe by harnessing the living culture, lush landscapes and hidden history. Working with a range of partners across the public and private sectors, it seeks to develop world-class experiences in order to build a brand of international quality and credibility, increasing the number of visitors staying overnight with additional revenues of €204m are targeted by 2020.

3.7 Tourism in the South East

In 2018, the South East region, comprising the Counties of Carlow, Kilkenny, South Tipperary, Waterford and Wexford, attracted just over 1m tourists and revenues of €261m, the second lowest recorded amongst all 7 domestic regions with the exception of the Border region. The market breakdown shows that tourists were drawn from *Britain (35%), Mainland Europe (37%), North America (24%)* and *other Long Haul (6%)*, whilst holidaymakers travelled from *Britain (22%), Mainland Europe (43%), North America (29%)* and *other Long Haul locations (7%)*. Typically the profile of the overseas holidaymaker to the region was aged *45 years or over (54%), travelled as a couple (52%), on a first visit to Ireland (67%), accessed Ireland by air transport (73%)* and *used a car (71%)* for a *hotel stay (48%)* for a duration of *2.5 nights*. Visitors to the South East from *Northern Ireland* accounted for 22,000 visitors and revenues of €8m, the second lowest recorded amongst all 7 domestic regions with the exception of the Mid-West. By contrast to the relatively modest performance for overseas tourists, 1.6m domestic tourists generated revenues of €304m in the South East making the region the third most popular in the State, after the South West and Dublin.

¹² Tourism Barometer, Failte Ireland; December 2018

3.8 Tourism Information Centres

Aside from digital channels and publications, tourism information and guidance is provided through a network of drop-in information centres. This includes FI operated Tourist Information Centres in Waterford City, Cork, Kilkenny and Wexford; Visitor Information Points at Lismore and New Ross as well as Community Tourist Offices at Dungarvan, Tramore, Youghal, Midleton and the Hook Peninsula. Guest accommodation and visitor attractions also facilitate the distribution of local guides and brochures on destinations, features of interest and individual tourism products.

3.9 Tourism in Waterford

In 2017, Waterford had a total of 582,000 visitors¹³ generating €127m in revenue. Of this amount, 327,000 domestic visitors staying for a total of 825,000 nights generated a total of €58 million in revenue. Within the South East region, Waterford is second (255,000) only to Kilkenny (315,000) for overseas visitors, however it achieves a greater yield in terms of revenues (€69m vs €55m) suggesting greater dwell time and overnight stays. By contrast, domestic visitor numbers which exceed those of overseas visitors comprise only half those visiting neighbouring County Wexford, itself a county destination whose appeal for the domestic market is exceeded only by the counties of Dublin, Cork, Kerry and Galway. FI research reveals that while Waterford County has increased its overseas visitor numbers from 201,000 in 2010 to 255,000 in 2017, the county has a lower per capita spend than the national average. This arises largely due to the reliance on the domestic market and its lower level of spend.

3.10 Accommodation Stock in Waterford

Overall, Waterford accounts for less than 3% of the established national tourist accommodation stock. It has 20 hotels with 1,392 rooms and 3,534 beds; 1 of which is 5*; 5 are 4* and 14 are 3*¹⁴. There are 4 Guesthouses with 38 rooms and 86 beds; 23 Bed & Breakfast establishments with 99 rooms and 245 beds; 8 Self-catering complexes comprised of 66 units and 287 beds; 5 caravan and camping sites with 581 pitches and a single 1 hostel with 35 beds. 9 premises with a bed capacity of 343 in the County have received the FI Welcome *Standard*¹⁵ - an entry level standard aimed at tourist accommodation businesses that currently do not fit the existing FI Quality Assurance system.

There are currently 306 properties listed on [airbnb.ie](https://www.airbnb.ie) available to rent as tourist accommodation throughout the City and County.

¹³ 2017 Topline Performance by Region; Failte Ireland, 2018/CSO;2018

¹⁴ <https://www.discoverireland.ie>

¹⁵ <http://www.failteireland.ie/Supports/Get-quality-assured/Welcome-standard/Information-Pack.aspx>

3.11 Product Development in Waterford

WCCC and its industry partners have delivered significant investment in tourism product development, promotional and public realm works in the City and County in the recent past. Chief amongst these have been the *Waterford Viking Triangle* (€19m), the *Waterford Greenway* (€18m), *Waterford City Urban Renewal Works* (€15m), *Waterford Treasures* (€10), *Dungarvan Smarter Travel/Public Realm* (€8), *Waterford Crystal* (€6m), *The Apple Market* (€2m) as well as €1.4m annually in festivals such as *Winterval* and the *West Waterford Festival of Food*. These investments have help increase visitor numbers and revenue and are expected to drive further growth in the medium term.

Table 6: Top tourism attractions in Waterford 2016 and 2017

Attraction	2016	2017
Waterford Greenway	n/a	248,000
The House of Waterford Crystal	188,574	187,705
Waterford Museum of Treasures	96,613	109,218
Waterford & Suir Valley Railway	27,400	28,611
Mount Congreve House & Gardens	24,422	26,000
Lismore Heritage Centre	23,000	25,000
Lafcadio Hearne Japanese Gardens	n/a	17,000

Source: WCCC/Fáilte Ireland Survey of Visitor Attractions

Despite some iconic attractions which attract strong numbers, it is notable that no visitor attraction in Waterford City and County currently features in either the *Top 20 Fee Charging*¹⁶ or the *Top 50 Free*¹⁷ *Visitor attractions* in the Country; the minimum threshold being 205,210 for the former and 33,798 for the latter. The Guinness Storehouse in Dublin was Ireland’s most popular fee-paying visitor attraction drawing 1.7m visitors in 2018. Four locations nationally attracted in excess of 1m visitors. The Office of Public Works (OPW) manages selected heritage facilities and amenities throughout Ireland. In 2018, there were over 8.6m visits to OPW sites of which Waterford attracted less than 1% or 62,381 in total; 44,232 to *Reginald’s Tower* and 17,434 to *Dungarvan Castle*. Only the Counties of Clare, Leitrim, Limerick, Louth, Mayo and Roscommon recorded fewer visits to OPW sites.

Waterford has developed a prominence and expertise in hosting a number of significant festivals and events that attract tourists and visitors throughout the year, serving to mitigate seasonal flows in

¹⁶ Fáilte Ireland, Top 50 Fee Charging Visitor Attractions 2018

¹⁷ Fáilte Ireland Top 50 Free Visitor Attractions 2018

tourist numbers. These include *Winterval, Spraoi, The Viking Festival, The West Waterford Festival of Food* and the *Imagine Arts Festival*, amongst many others. Other experiential activities are also provided through a wide array of workshops and events including those provided directly by tourism operators, guides, artists, craft and food producers.

IAE tourism hotspots in near proximity to Waterford include the towns of Cashel, Kilkenny and Wexford. Waterford is also within easy reach of Cork City via the N25; a destination city within the IAE but importantly also a gateway to the *Wild Atlantic Way*. The Cork region accounts for over 1.6m overseas visitors generating revenues of 631m and 1.1m domestic visitors generating €202m.

3.12 Tourism Growth in Waterford

WCCC has set ambitious targets for the growth in total visitor numbers to the city and Waterford based on annual growth of 15% per annum for the period to 2022, yielding 1.17m visitors and revenues of €255m; double the 2017 figures. This is to be achieved through the enhancement of existing visitor attractions; the development and promotion of festivals and events; the development of new world class visitor experiences; increased promotional spend; consolidation of the *Visit Waterford* Brand; and improved collaboration with FI, Tourism Ireland and industry stakeholders throughout Waterford and South East. The expected themes focus areas and priority projects for development include:

Table 7: Expected drivers of visitors and revenues

Driver	Project Specifics
Enhancement of Existing attractions	Waterford Greenway: Kilmacthomas Famine workhouse; Kilmacthomas Train Station; Woodstown Viking Site; development of Interpretation and Play Areas; Enhanced connectivity and access of Greenway to Waterford City Centre and North Quays:
	Waterford Treasures: New exhibitions to include The Story of Irish Silver – from Vikings to the Victorians; The Irish Museum of Time; Glass Making in Waterford at the Bishop’s Palace; Enhanced Viking Focus and clearer demarcation of the Viking Triangle
	Mount Congreve House & Gardens : Development of the World class gardens as a key visitor attraction for international visitors to the south east
Festivals and Events	Waterford Winterval; SPRAOI; International Viking Festival; Comeragh’s Wild Festival; Waterford Harvest Festival; West Waterford Festival of Food; Spróg; Imagine Arts Festival; St. Patrick’s Festival; Culture Night; Waterford Writer’s Weekend; Waterford Festival of Architecture; 1848 Tri-colour Celebration; Golden Years Festival; Viking Marathon, etc.
New World Class Visitor Experiences	Culture & Creativity: Interplay of people and place to be Inclusive (everyone has a voice, celebration of difference); Sustainable (long term organic growth); Innovative (new ways of doing things; encouraging experimentation); Engaging (exciting, interesting & attractive); Distinctive (Waterford, unique, inspiring).

Strategic Development Zone	Development of 8 hectare North Quays site (with 1km of water frontage) as a mixed use residential and commercial development with a multi-modal transport hub linked to city centre, Waterford Greenway and the Apple Market shopping development. In a comprehensive cost benefit analysis ¹⁸ of the site, the likely impact of the development on local tourism visitor numbers and revenues was appraised. In a survey of 111 local businesses, estimates predicted significant growth in overseas visitors to the city tourism yielding a minimum additional 30,500 visitors and €35m in revenue.
Increased Promotion and Consolidation of the Waterford Brand	Through enhancement of existing and new promotional channels to include new website; greater agency and stakeholder collaboration; development and enhancement of <i>Visit Waterford</i> initiative; focused tourism analysis and promotional plan; direct promotion of key activities and attractions (<i>heritage, gardens, sea & coastline; cultural & iconic, outdoor activities, food experiences, shopping retail, nightlife, festivals, accommodation and sports</i>);

Source: Waterford City & County Council

Particular note might be made of the strategic importance of high profile tourism developments immediately adjacent to the Copper Coast. Chief amongst these are the [Waterford Greenway](#) and [Mount Congreve House & Gardens](#). Opened in 2017, the 46km Waterford Greenway links Waterford City to Dungarvan and bounds the Copper Coast to the north, adjoining it at Durrow, near Stradbally. Exclusively off road and part of the planned [Eurovelo 1](#), transnational cycle route, it attracts almost 250,000 visitors, of which 106,000 are walkers and 142,000 are cyclists; numbers having remained constant in 2018. In 2017, extensive [research](#)¹⁹ revealed tourist perceptions, motivation for and duration of visit, user profile and product choices for the Greenway. Of particular note was the economic impact of the Greenway with 11% of survey respondents spending over €100 per night on accommodation for the most part in Dungarvan and to a lesser extent in Waterford City. In addition to this, 41% of the 1,177 respondents spent an average of €28.50 per Greenway visit. The average spend on food and drink, bike hire and ‘other’ combined among all Greenway users was €16.90 per day.



¹⁸ Indecon; 2017
¹⁹ Amárach Research
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The success of this project, its likely continued development and profile as a core piece of tourism infrastructure throughout the County as well as its capacity to be a catalyst for the development of other tourism products represents an exceptional opportunity to grow tourism numbers and revenues locally. Plans are in place to extend the Waterford Greenway through the Waterford City; linking it to the proposed transit interchange at the North Quays and [eastwards](#) through Counties Kilkenny and Wexford to Rosslare Europort.

Mount Congreve House and Gardens is impressive country estate that forms an important element of the architectural heritage of County Waterford. The house and internationally acclaimed gardens are held in trust for the Irish State and currently serve as a visitor attraction in Waterford. The estate is situated on the banks of the River Suir and bounds the Waterford Greenway and the [Waterford and Suir Valley Railway](#). Seeking to create a world class visitor attraction, WCCC plans to renovate and upgrade the estate with an emphasis on best practice in environmental sustainability, accessibility, education and inclusion. Its' plans provide for enhanced access by the public; facilities for education and research and events; the provision of visitor accommodation in the house and the upgrade of apartments and cottages; the development of the farm yard to incorporate a café, meeting facilities, craft yard, enterprise incubation units, a farmers market, children's play area and a retail unit; the enhancement of the visitor gardens, grounds, paths and greenhouses; the upgrading of access, car and coach parking facilities; the installation of a bio-barrier membrane waste water treatment system and the creation of a wetland garden. On completion of the propose works it is anticipated the Mount Congreve House and Gardens will attract over 150,000 visitors annually.



In late 2019, it is expected that WCCC will launch its countywide *Tourism Product and Promotion Plan*; its focus being a comprehensive analysis of the tourism product, an appraisal of the wider tourism offering, the visitor experience dynamic and related experiential factors. In addition to this, the Plan evaluates marketing structures and partnerships; develops unifying stories linked to target markets and proposes new regional tourism initiatives and promotional opportunities. Linked to the IAE brand, the plan develops a unifying story and delivers a €600,000 promotional initiative in domestic and overseas tourism markets.

4. The Copper Coast: A Socio-economic Summary

4.1 Context, Settlement & Population

The area defined as the Copper Coast is located on a 25km coastal stretch between Dungarvan to the west and Tramore to the east. Its territory lies almost exclusively in the Municipal District of Comeragh with the exception of the village of Fenor and its surrounds which lies in the Municipal District of Waterford. The northern periphery of the area is marked by the settlement of Kill; the area's territory being exclusively demarked due to its geological character and features as a UNESCO Global Geopark. The WCCC County Development Plan 2011-2017 determines these areas to be *stronger rural areas* with the areas adjacent to Dungarvan and Tramore regarded as being *under urban pressure*.

Figure 6: A map of the Copper Coast.



In the County Development Plan 2011-2017 WCCC set population targets for 2022 for the County (79,495), the City & environs (62,500) and Dungarvan as County town (13,400). Derived from the *Regional Planning Guidelines Review, Gateway and Hub Population Targets (RPG's)* these suggested an 18% population increase. The spatial distribution of the planned population growth will accord with the settlement hierarchy from Gateways, Hubs, County Town, other towns and smaller towns, villages and

rural areas. The underlying objective is to develop critical mass and scale in Waterford City as a Gateway; the pivotal role of Dungarvan in the Atlantic Corridors Strategy; the strengthening of Tramore as a larger towns; the building of scale in smaller towns and villages; the minimisation of urban generated rural housing; sustainable rural development; and the protection of sensitive coastal and upland landscapes. Census 2016 records a County population of 116,176, of which 53,504 were located in the City and suburbs and 9,227 in Dungarvan.

The Copper Coast comprises the Electoral Divisions of *Carrigcastle*, *Knockmahon*, *Annestown* and *Dunhill* in their entirety as well as tracts within the Electoral Divisions of *Stradbally*, *Gardenmorris*, *Reisk* and *Islandikane*. Combined this represents a population of approximately 3,250 inhabitants in an area of 90km². The resident population of the area has remained constant in the inter-censal period between 2011 and 2016. Settlement patterns however are profoundly rural with the villages of Stradbally (438), Kill (271) and Dunhill (216) only accounting for a third of the area’s population and each falling substantially below the EU defined urban population threshold of 1,500. Within the Copper Coast area the settlements of Stradbally, Kill and Dunhill are designated by WCCC as *District Service Centres*; Bunmahon/Knockmahon as a *Local Service Centre* and Annestown, Fenor and Ballylaneen designated as *Settlement Nodes*.

Figure 7: Settlement Plan Form & Morphology.



Source: © [OpenStreetMap contributors](#)

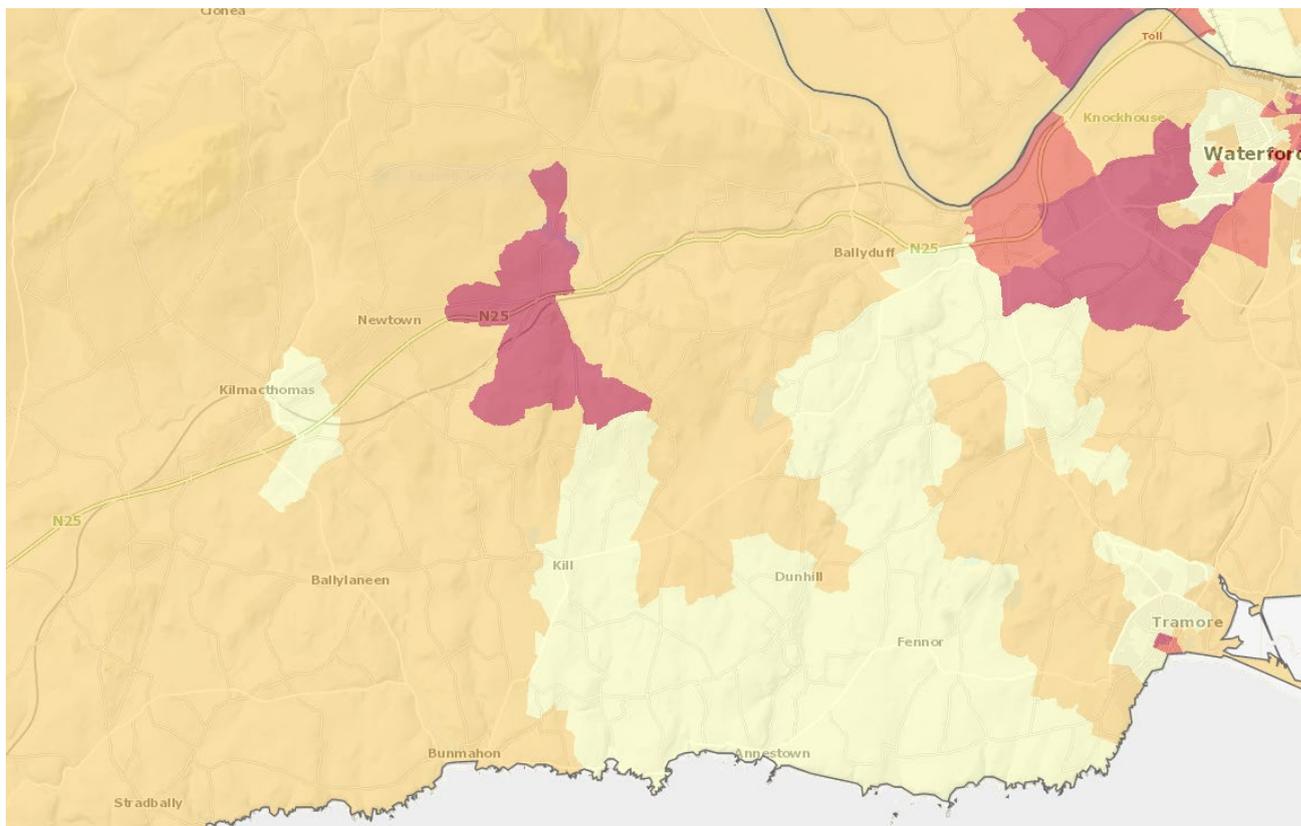
Such designations reflect lower levels of population, employment, infrastructure, public and retail services, with the towns of Dungarvan and Tramore providing important commercial and employment

functions locally. Their importance as service centres for a large rural hinterland as well as their profile and prominence as tourism destinations allows each to support a range of economic and commercial activities. This includes professional services; public administration; financial services; education; health and wellbeing. Their range of convenience, comparison and speciality retail; hospitality and food businesses as well as craft and creative industries are atypical of rural Irish towns; owing much to the buoyancy of its strong tourism trade. The low level of resident population in the settlements throughout the Copper Coast raises issues of the sustainability and vibrancy of the area and inhibits the building of scale in economic and community development as well as posing challenges in sustaining other employment, social, amenity and retail services.

4.2 Economic Profile

Census 2016 offers some insight into economic activity and employment in the Copper Coast. To a very significant degree the working population in the area was employed in the *Professional Services, Commerce and Trade* and *Manufacturing* categories. Direct tourism employment locally is most likely accounted for in the *Commerce and Trade* category. The level of employment intensity within the Copper Coast is illustrated as follows:

Figure 8: Percentage of workers over daytime population

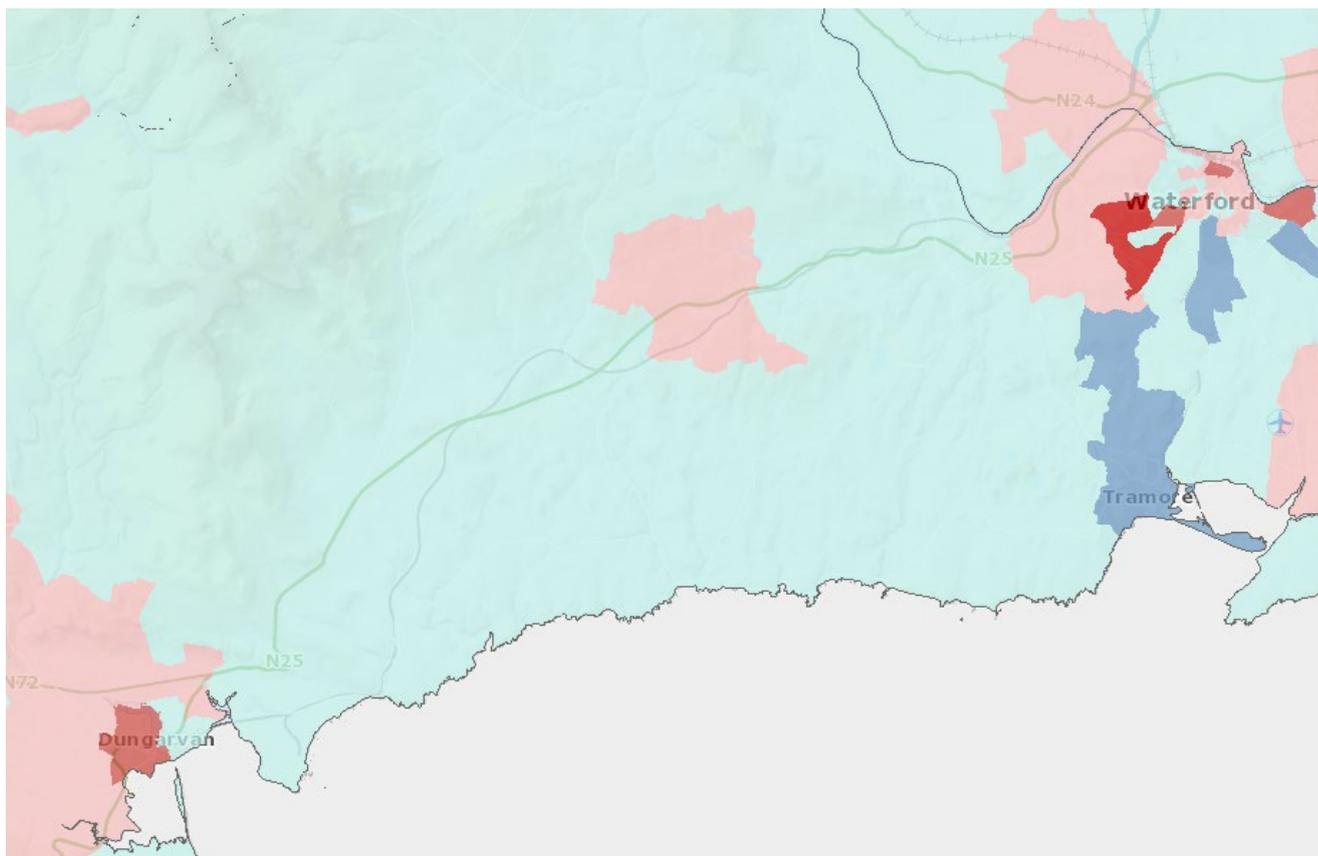


Source: CSO, 2016

Thus, it can be seen that the area hosts comparatively modest levels of direct employment and relies on the provision of employment in adjacent locations. In general, commuting time to work is 30 minutes or less suggesting relatively localised employment, most likely in Waterford city, Dungarvan and Tramore. Dawn Meats operates a substantial retail packing and foodservice facility at Carroll's Cross, Kilmacthomas. Employment in the *Agriculture, Forestry and Fisheries* category was more pronounced in the Carrigcastle and Knockmahon ED's than elsewhere within the Copper Coast.

Dunhill Eco Park located at Bally Phillip was established by local interests in 2000. This award winning model of community enterprise has developed through successive phases to include workspace, meeting, conference and education facilities. Currently, it accommodates a range of enterprises that avail of light industrial, production and office facilities in leased or owned premises. Since inception the Ecopark has found particular favour with food and related support enterprises augmented by other general services and activities; most particularly administration, training and craft production. The Ecopark also hosts the Dunhill Multi-Education Centre, a community-owned education centre which offers a range of accredited training programmes.

Figure 9: Commuter flows (inward commuters less outward) by ED, 2016.



Source: CSO, 2016.

4.3 Tourism in the Copper Coast: Accommodation, Amenities, Facilities and Attractions

The tourism product and infrastructure within the Copper Coast is modest with the accommodation offer particularly narrow in scale and scope. The absence of hotel accommodation is a particular limiting factor as hotels tend to be the accommodation most favoured by overseas visitors to Ireland as well as being an obvious manifestation of the profile, prominence and scale of a tourist destination. The Copper Coast B&B and Seaspray (radharc-na-farraige), both located in Bunmahon are the only accommodation listings in the area featured on the Fáilte Ireland www.discoverireland.ie website. There are no hotels, guesthouses or hostels located within the Copper coast listed on this site, although these are widely on offer in nearby Waterford City, Dungarvan and Tramore as well as in other settlements within a short drive. A static mobile home park is located adjacent to the beach in Bunmahon

Tourist accommodation is also promoted through *Airbnb* with clusters of accommodation in Stradbally and environs (7 properties with capacity for 36 guests); Bunmahon and environs (6 properties with capacity for 23 guests); Annestown and environs (9 properties with capacity for 39 guests) and Dunhill (1 property with capacity for 5 guests). Despite the popularity of *Airbnb* amongst tourists, the reliance on accommodation that, in some instances might be regarded as informal and casual, is far from ideal and is unlikely to be the cornerstone on which a vibrant industry of scale can be built. Indeed, the sustainability of the *Airbnb* platform may be questionable or diminished arising from new hosting regulations and taxation requirements introduced in 2019.

Added to the limited nature of the tourist accommodation offer, there is also an extremely limited convenience, comparison and speciality retail offer in each of the settlements in the Copper Coast. Public administration and general services tend also to be located in the larger adjacent towns. Thus, the area – its' residents and visitors -are reliant on the commercial and retail offerings in Dungarvan and Tramore as well as smaller adjacent settlements such as Kilmacthomas and Kilmeaden.

Formal visitor attractions are few and to a very significant degree much of the wider tourism product is non-fee charging; being principally comprised of natural amenities, historical sites and recreational areas. The Copper Coast does offer a range of active recreational activities and amenities such as watersports, boating, and swimming. The area is well endowed with beaches throughout; the most prominent being Garrarus, Benvoy, Kilmurrin, Boat Strand and Stradbally Cove. There are no Blue Flag beaches; the nearest being those at Tramore, Dunmore East and Clonea. The beaches at Annestown and Newtown Cove are the sole recipients of the An Taisce Green Coast Award for 2019 criteria for which recognised their clean environment, excellent water quality and natural beauty as well as the management of these sites in partnership with local voluntary groups and WCCC. Lifeguard and Inshore Rescue facilities are located in Bunmahon, the latter which was established in 1986 and is a declared resource to the Irish Coastguard. It is part of Community Rescue Boats Ireland (CRBI) a nationwide network of independent voluntary rescue boats trained and administered by Irish Water

Safety. The Royal National Lifeboat Institution (RNLI) operates stations at Helvick Head, Tramore and Dunmore East in the County. The Irish Coastguard Station operates its *Search and Rescue* (SAR) 117 service from a base at Waterford Airport.

Access to the water is enabled at piers, quays and slips along the coast and support leisure activities such as walking, cycling, sea swimming and ornithology amongst others. There are a number of trails and walks throughout the area although only the Anne Valley Walk and the Stradbally Slí Na Slainte are listed on Sport Ireland's [irishtrails](#) website. Notable by their absence are trails at Fenor (6); Stradbally (2); Annestown/Boatstrand (3) as well as Annestown Heritage E-Trail; Boatstrand/Dunabrattin (3) and a Biodiversity Trail at Bunmahon. Each of these trails are well developed with signposting, information boards and published guides; all offering a wealth of information on antiquities, features, amenities, points of interest, flora and fauna locally. The Sean Kelly Cycle Route travels through the Copper Coast for much of its 73km distance between the towns of Dungarvan and Tramore, onwards to Passage East. The Stradbally Copper Coast Geopark Loop is an 11km cycling route linking the Waterford Greenway at Durrow and Stradbally and environs via a tunnel built by the last of the Bunmahon Copper miners and the densely forested roadways surrounding Woodhouse Estate. The Dunhill Multi-Education Centre in association with Waterford Wexford Education Training Board offers a 44-week, QQI level 5 [Tourism Trails with Smart Media](#), the aim of which is to upskill a cohort of people for tourism and recreation enterprises with specific focus on the development, management and maintenance of recreational trails in Waterford.

Chief amongst the local tourism attractions and activities the Copper Coast Geopark Visitor Centre in Bunmahon; the Woodhouse Estate Museum at Stradbally; the Mining Heritage Trail; craft workshops by the Art Hand in Bunmahon; the surf school at Bunmahon; kayaking with seapaddling.com in Fenor; the Greenway Man Bike Hire at Stradbally; the Copper Coast mini pet farm at Fenor; coarse and game fishing at the Anne Valley Angling Complex and a Geological Garden in Bunmahon which introduces visitors to the unique geology of the Copper Coast; its *Time Path* guiding visitors through key stages in Earth history and evolution with local rock sample on display. Public toilets are located adjacent to the beach in Bunmahon and at Stradbally. A monthly Farmers Market takes place in Dunhill. Golf is available at Dungarvan, Tramore Dunmore East and Waterford. Tourism information on local attractions in the vicinity is made available by the Geopark Visitor Centre in Bunmahon.

In spite of its modest scale, the Copper Coast has a well-developed social, amenity and recreation infrastructure within and across each of its 7 settlements. This is particularly manifest in the development and presentation of its natural and environmental resources and its community, social and sporting assets; each of which reflects strong and vibrant community engagement and volunteerism. Local community initiatives in heritage management and presentation, community enterprise, environmental management and the development of community assets and amenities are a notable feature of the area adding to the appeal of the area for visitors. In addition to the core value

and purpose, these developments reflect strong social capital, community ties and an identity and sense of self; all vital factors in sustaining the wellbeing of the rural population and enhancing the quality of life of its citizens. Children's play facilities are located at modern playgrounds in Stradbally, Bunmahon and Fenor. Community facilities which house and accommodate a variety of social, sporting and cultural activities can be found at Bunmahon, Kill, Dunhill, Stradbally and Fenor. The 35th Waterford Copper Coast Scout Group, comprising *Beaver*, *Cub Scout* and *Scout*, provides an important social outlet for younger people as well as being an important link to the active outdoors, recreation, amenity and natural environment.

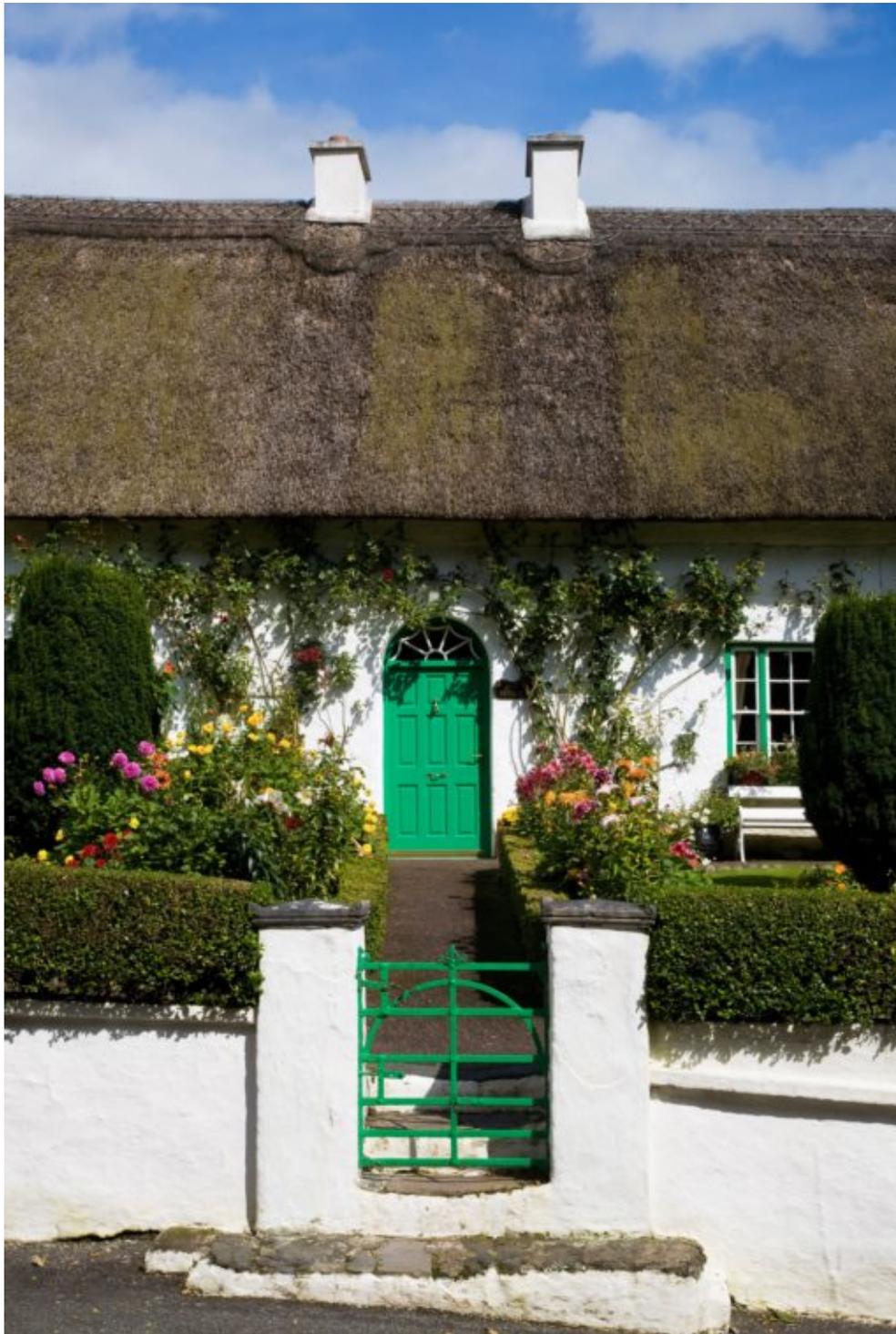
Alone amongst the settlements in the Copper Coast, Fenor and Stradbally are active participants in the National Tidy Towns Competition; each performing strongly in 2019 with particular reference to *Nature and Biodiversity* and *Community Planning and Involvement*; less so, however, in relation to *Sustainability – Doing More with Less*. Notably, Stradbally achieved the highest marks in County Waterford (342); only four marks fewer than Glaslough, Co. Monaghan, the National winner. Dunhill last participated in the competition 2014, Annestown in 2008 and Bunmahon in 1996. Tidy Towns Adjudicator reports (see appendix 3) provide a useful summary of local motivations, ambitions and skills and also serve as a very useful proxy to identify community development projects.

4.4 Heritage & Built Environment

The quality of the built environment, vernacular traditions as well as the legacy of the area's industrial heritage is documented in the [National Inventory of Architectural Heritage](#) and the [Record of Protected Structures](#) (RPS). The former lists over 100 buildings and structures of different styles, scale and proportions; the latter lists over 40 individual properties and structures throughout the Copper Coast each having historical character, merit and architectural significance in a regional context. Notable amongst these are the streetscapes, churches, the individual houses and commercial premises in Stradbally and Annestown; the Engine House in Tankardstown; mine pits in Bunmahon; and kilns in Annestown and Stradbally. The inclusion of these structures in the RPS means that their importance is recognised, they are legally protected from harm and all future changes to the structure are controlled and managed through the development control process or by issuing a declaration under [Section 57 of the Planning and Development Act 2000](#). Planning permission is required where work carried out on a protected structure would materially affect its character. However, recent legislative changes enacted in 2018 have relaxed some of the requirements having as their objective, the re-use of former commercial premises for residential housing.

County Waterford has a notable stock of thatched cottages, not all of which feature in the *National Inventory of Architectural Heritage* or the *Record of Protected Structures*. Nonetheless, they are important examples of the built heritage and represent fine examples of the vernacular tradition. They are redolent of many folk memories and tourist associations with Ireland. It is estimated that

approximately 250²⁰ thatched cottages of one form or another remain; many notable examples can be found in Stradbally, Bunmahon, Annestown, Dunhill and Fenor in the Copper Coast.

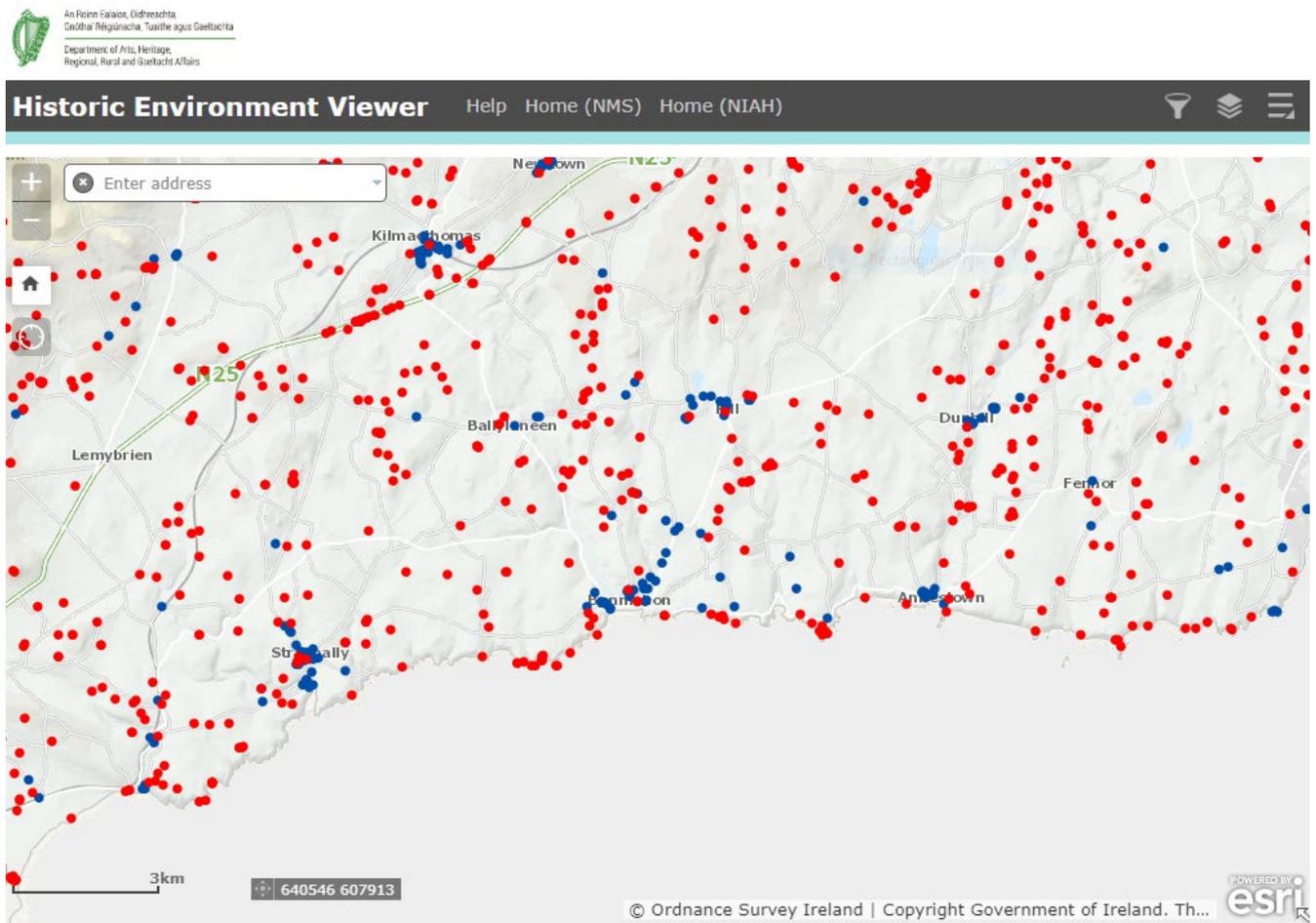


Thatched Cottage Stradbally: George Munday/Alamy Stock Photo

²⁰ County Waterford Thatched Houses, Report of Finding, John Cronin & Associates, 2008

The OPW has responsibility for the day-to-day running of all National Monuments in State care and National Historic Properties. It has 20 fee-paying heritage sites across the south east, none of which are located in the Copper Coast. The Copper Coast however boasts a wealth of antiquities and heritage artefacts. These include castles; towers; houses; forges; bridges; ringforts; souterrains; raths; standing stones, alignments and stone circles; burial grounds, cairns; earthworks and enclosures; field systems; holy wells and fulachta fiadh. Throughout the Copper Coast there are over 280 national monuments²¹, as defined in Section 2 of the National Monuments Act (1930) meaning a monument whose *'preservation of which is a matter of national importance by reason of the historical, architectural, traditional, artistic or archaeological interest attaching thereto...'*. Notable features include Holy Wells (Ballylaneen, Boatstrand); Ogham Stones (Geological Garden, Bunmahon, Drumlohan); Standing Stones (Ballinaclough); Megalithic Tombs / Dolmens (Matthewstown, South east Ballyscanlon Hill, Dunhill, Ballynageeragh and Gaulstown) and Promontory Forts (Dunabrattin Head, Kilfarrasy and Annestown)

Figure 10: Location of historic structures, monuments & antiquities.



Source: National Monuments Service, 2019.

²¹ [https://www.archaeology.ie/sites/default/files/media/pdf/Archaeology-RMP-Waterford-Manual-\(1995\)-0050.pdf](https://www.archaeology.ie/sites/default/files/media/pdf/Archaeology-RMP-Waterford-Manual-(1995)-0050.pdf)

4.5 The Copper Coast UNESCO Global Geopark

The Copper Coast UNESCO Global Geopark (CCUGG) effectively delineates the territory of the Copper Coast; defining its identity, showcasing its landscape, geology and industrial heritage. It is one of 140 UNESCO Global Geoparks worldwide and one of three on the island of Ireland, attaining that status in 2015.

UNESCO Global Geoparks are defined as single, unified geographical areas where sites and landscapes of international geological significance are managed with a holistic concept of protection, education and sustainable development. In using its geological heritage, in tandem with other aspects of the area's natural and cultural heritage, a UNESCO Global Geopark has a number of specific [focus areas](#); *natural resources; geological hazards; climate change; education; science; culture; women; sustainable development; local & indigenous knowledge and geo-conservation.*



Stained Rocks, the Copper Coast: Design Pics Inc/Alamy Stock Photo

A UNESCO Global Geopark is characterised by four distinctive features:

Geological Heritage of International Value - The area must have geological heritage of international value as determined by scientific professionals. This assessment is based on international peer-reviewed, published research conducted on the geological sites within the area. A globally comparative assessment is then used to determine whether the geological sites constitute international value.

Management – The area must be managed by a legally constituted competent body whose vision and mandate addresses the entire area and includes all relevant local and regional stakeholders. A comprehensive Management Plan, agreed upon by all the partners is mandatory. Incorporating governance, development, communication, protection, infrastructure, finances and networking, it provides for the local social, economic and environmental needs; protects the landscape and conserves the cultural identity.

Visibility - Global Geoparks must promote sustainable local economic development through the concept of geo-tourism. This is promoted through a specific corporate identity and brand through the medium of a [dedicated website](#), information leaflets, detailed maps and a wayfinding and interpretation strategy to connect the area’s geological and other sites.

Networking – Global Geoparks are established through a bottom-up process involving all relevant local and regional stakeholders and authorities in the area (land owners, community groups, tourism providers, and local organisations, etc); a process that requires firm commitment by the local communities, a multi-level partnership with long-term public and political support and the development of a comprehensive strategy that will meet all of the communities’ goals while showcasing and protecting the area’s geological heritage. Cooperation between local residents and interest groups must be actively facilitated as must international and inter-territorial cooperation with other Global Geoparks through the [Global Geoparks Network](#) (GGN). This seeks to build reciprocity, advocacy capability, resource sharing as well as a platform for the exchange of information, knowledge and expertise. The Copper Coast forms part of the *European Atlantic Geo-tourism Route* comprised of dramatic landscapes in *Portugal, Spain, France, Britain and Ireland*. This has been developed through active partnership in the EU Interreg Atlantic Area programme and support from the GGN.

More broadly, designations by the [United Nations Educational, Scientific and Cultural Organisation](#) (UNESCO) serve to promote quality education and lifelong learning for all; mobilise science knowledge and policy for sustainable development; address emerging social and ethical challenges; fostering cultural diversity, intercultural dialogue and a culture of peace and build inclusive knowledge societies through information and communication. Its designations in Ireland are few to date comprising only of the Copper Coast UNESCO Global Geopark (and other Geoparks in the *Burren and Marble Arch Caves*); *World Heritage Sites* at Brú na Bóinne, Scelig Mhicil; the Giant’s Causeway and the Causeway Coast; *Memory of the World Register* for the Book of Kells; *Biosphere Reserves* at Dublin Bay and Kerry as well as *Intangible Cultural Heritage* inscriptions for Uilleann piping and Hurling.



The Copper Coast: George Munday/Alamy Stock Photo

The CCUGG is managed locally by the Copper Coast Global Geopark CLG (CCGG), a non-profit social enterprise dedicated to community development through the promotion of sustainable tourism and the development of productive partnerships. Established in 2004, the organisation builds on earlier informal initiatives and promotions from the 1990s. Aside from its core objectives and remit, the CCGG acknowledges a wider role in sustainable economic development. Actively promoted under the [IAE](#) brand, the CCUGG is the most prominent tourism attraction and facility locally and provides considerable impetus for local tourism development, marketing and promotion. This includes wayfinding and active promotion of the Geosites that comprise Geopark. These are located at *Dunabrattin Head/Boatstrand Harbour; Garrarus Strand; Kilfarrasy Strand; Tra Na Mbo and Bunmahon Head; Tankardstown; Knockmahon & Stage Cove; Ballydwan Bay; Stradbally Cove; Kilmurrin Cove; Fenor Bog; Gaulstown Dolmen; Dunhill Castle and the Geological Garden*. Each of these sites, promoted, interpreted and accessible to the general public, offers considerable insight and perspectives into the geology, natural environment, commerce and heritage of the area. The CCGG also operates a Visitor Centre, exhibition space and café in a refurbished former church at Bunmahon, from which it facilitates guided tours; maintains genealogical records; and archival material; provides educational programmes for primary and secondary students as well as outreach and fieldwork

programmes (Volcanic and Desert Landscape Investigation, Seashore Habitat Studies and Mining Heritage tour). 20 local businesses who actively promote the area are accredited to its [Ambassador Scheme](#). In addition to landscape and geology, the CCGG has also extensively documented and interpreted the areas archaeology, flora, fauna, built and its mining heritage; information for which is distilled on the CCGG [website](#). Care is also taken to promote tourism attractions and amenities locally such as the network of walks, trails and cycle routes, trail cards for which can be downloaded for Annestown (including audio-trail), Boatstrand, Bunmahon, Dunhill, Fenor and Stradbally. The CCGG maintains an active programme of events throughout the year. Workshops and events as well as initiatives of interest within the wider community are actively promoted on the [website](#) and through [social media](#) (National Heritage Week, Literary weekend, Book Fair, Christmas Fair, Kids Variety Showcase, Seaweed Foraging, Craft Skills Day Taster, miscellaneous educational, arts and cultural initiatives, etc.). Social media is tracked regularly and is monitored for its impact on media references and on visitor numbers. A visitor profiling and attitudinal survey is carried at the Visitor Centre.

The CCGG is guided by a strategic plan for the period 2019-2023. This establishes its mission, vision and objectives; reasserts its guiding principles; identifies its key challenges and sets out its development priorities and enabling actions, central to which are the development of its education initiatives; enhanced use of information and communication technology (ICT); networking; community engagement and facilitation; events; product and amenity development and organisational development. Consideration will also be given to extending the territory of the Geopark. A target in excess of 30,000 has been set for fee paying visitors per annum by 2023; more than doubling current fee paying visitor numbers to the Geopark Visitor Centre. Care has been taken to identify the primary and secondary target markets and the factors that may facilitate or inhibit market development and growth. While the direct marketing spend proposed by CCGG is modest, considerable emphasis has been placed on brand development; a new corporate identity for the Copper Coast Geopark having been developed in 2019. This will form a central element in a renewed emphasis on marketing to revise and update existing promotional material as well as being integral to the enhanced directional signage and information boards to be introduced as part of a new *wayfinding* strategy.

Figure 11: Brand Development & Corporate Identity





Stage Cove, the Copper Coast: George Munday/Alamy Stock Photo

4.6 Proximity to other Attractions

As an exploration base the Copper Coast affords easy access to many tourism attractions and facilities throughout the City, County and beyond. Waterford City offers a wide range of accommodation, retail, ancillary services, events and flagship tourism attractions such as the Viking Triangle and Waterford Crystal. Within the County the Waterford Greenway – part of the 9000km Eurovelo Cycle Route from Portugal to Norway - Mount Congreve House & Gardens, the Waterford & Suir Valley Railway and the towns of Tramore and Dungarvan are close by while further afield the Comeragh and Knockmealdown mountains, the Blackwater and Suir rivers and the towns of Lismore and Ardmore hold great appeal for visitors. The adjacent counties of Cork, Kilkenny, Tipperary and Wexford host a wide range of attractions amenities and facilities; Wexford being perhaps of particular relevance given the clustering of tourism attractions linked to the Norman and Viking themes in New Ross, Hook Head and across the Waterford Estuary.

4.7 Climate, Land Use & Agriculture

The climate in Waterford is generally warm and temperate, considered to be *Cfb*²² according to the Köppen-Geiger climate classification. There is significant rainfall throughout the year with annual rainfall averages of 984 mm; a difference of 48 mm of precipitation between the driest and wettest months. The temperature averages 10.1 °C with July the warmest month of the year averaging 15.7 °C. The average temperatures vary during the year by 10.4 °C. By contrast the average temperature in January, the coldest month, is 5.3 °C²³. In line with global trends, Ireland's average temperatures have increased and are predicted to increase by 1.25-1.5 degrees Celsius by 2040, with south-western areas becoming warmer and drier in the summer months. Nationally, rainfall is expected to increase in winter by about 15%. Extreme rainfall events show more marked changes with more events occurring in the autumn and a 20% increase in 2-day extreme amounts. Given global, EU and national priorities it can be assumed that climate mitigation and adaptation policies will exert a significant impact on land use, agricultural activity, fishing, habitation, recreation and on the natural environment in the area.

In 2017, farm incomes²⁴ in County Waterford were the 6th highest in the state grossing €49,189 per holding; of which €37,331 was classified as farming income. Succession in family farming is demonstrated whereby farms in County Waterford accounted for 2.7% of claims (but 3.8% share of costs) for *Capital Acquisition Tax Agricultural Relief* and 1.8% of *Stamp Duty* returns for agricultural lands and

²² Temperate oceanic climate; coldest month averaging above 0 °C (32 °F) (or -3 °C (27 °F)), all months with average temperatures below 22 °C (71.6 °F), and at least four months averaging above 10 °C (50 °F). No significant precipitation difference between seasons.

²³ <https://en.climate-data.org>

²⁴ www.revenue.ie/en/corporate/documents/statistics/farmers/farmer-income-county.csv

2.4% of Stamp Duty returns in respect of *Young Farmer* exemptions in 2018. Quite apart from its economic importance agriculture is an activity that exerts a considerable influence over biodiversity and other aspects of environmental quality, having both positive and negative effects. Environmental quality is one of the Copper Coast’s prime resources with landscape character and its natural resources of critical value to the agriculture, food and fisheries sectors. Furthermore, the environment exerts a strong influence on the *Quality of Life* and on *Quality of Place* locally; currently critical determinants of visitor appeal of interest and likely to be a key driver of consumer interests and purchase behaviour. Regenerative farming where farms have adopted systems that reduce environmental impact and restore the lost biodiversity is well established amongst many local farms, most notably in the Integrated Constructed Wetlands in the Anne Valley. Insight into agriculture and land use locally is provided by the CSO *Census of Agriculture* 2010. This revealed that although accounting for relatively modest direct employment, there were approximately 140 holdings and 6,000ha being farmed in the Copper Coast area. This suggests that over 50% of the land mass in the area is actively farmed. Key summary data for the Copper Coast by ED for 2010 is as follows:

Table 8: Agriculture Profile

Electoral Division	Total no. of Farms	Area Farmed ha	Total Annual Work Unit²⁵
Annestown	32	1,418	46
Carrigcastle	17	550	20
Dunhill	18	767	30
Gardenmorris*	16	854	17
Islandikane*	46	1,816	59
Knockmahon	20	994	35
Reisk*	37	1,711	55
Stradbally*	33	1,110	37
Total	219		

Source CSO, *Census of Agriculture, 2010*

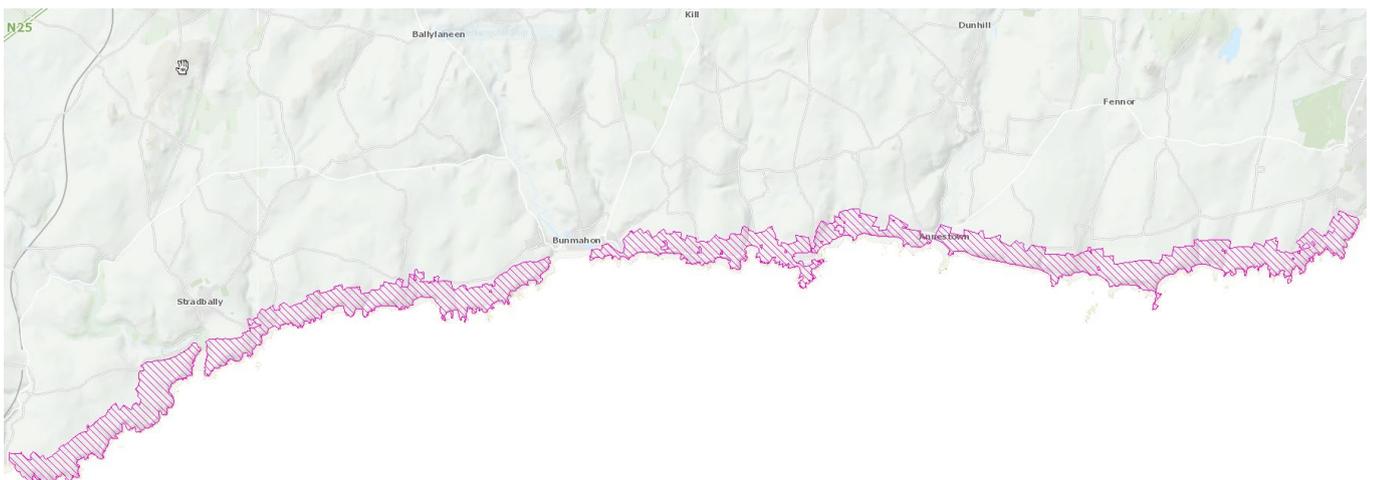
*denotes Electoral district part located within Copper Coast, with farming activity located therein estimated to be 40% of the total within the ED.

²⁵ **Annual Work Unit (AWU):** The labour input of each person who worked on the farm was measured in terms of AWUs with one AWU being defined as 1800 hours or more of labour per person per annum

4.8 Landscape Quality & Environmental Protection.

Almost the entirety of the coastline in the Copper Coast is regarded as being of strategic national and international importance as a wildlife conservation area and habitat. Termed the *Mid-Waterford Special Protection Area (SPA)* by the National Parks and Wildlife Service (NPWS), it ranges from Newtown Cove to the east and Ballyvoyle to the west. The site includes the sea cliffs and the land adjacent to the cliff edge with the high water mark forming the seaward boundary. The area is underlain by Devonian sandstones, siltstones, mudstones and conglomerates as well as a variety of volcanic rocks of Ordovician age. Sea cliffs are the predominant habitat of the site; these occur along its length and are generally well-vegetated by a suite of typical sea cliff species. Above the cliffs areas of heath, improved grassland, unimproved wet and dry grassland, and woodland occur. The designated site throughout is of special interest for important breeding species such as *Chough*, *Peregrine Falcon*, *Cormorant* and *Herring Gull* as well as for smaller populations of other breeding seabirds such as *Fulmar*, *Shag*, *Guillemot*, *Razorbill* and *Black Guillemot*. As a part of the *Natura 2000* network, a primary objective of an SPA is to maintain or restore the favourable conservation status of a habitat and species deemed of community interest. EU and national legislation places a collective obligation on Ireland and its citizens to maintain habitats and species in the *Natura 2000* network at favourable conservation condition. Thus, Government and its agencies are responsible for the implementation and enforcement of regulations that will ensure the ecological integrity of sites such as the *Mid-Waterford SPA*. All areas so designated and protected carry restrictions and limitations in terms of their use for farming, aquaculture, planning and development, amenity and recreation with a view to protecting and encouraging greater biodiversity.

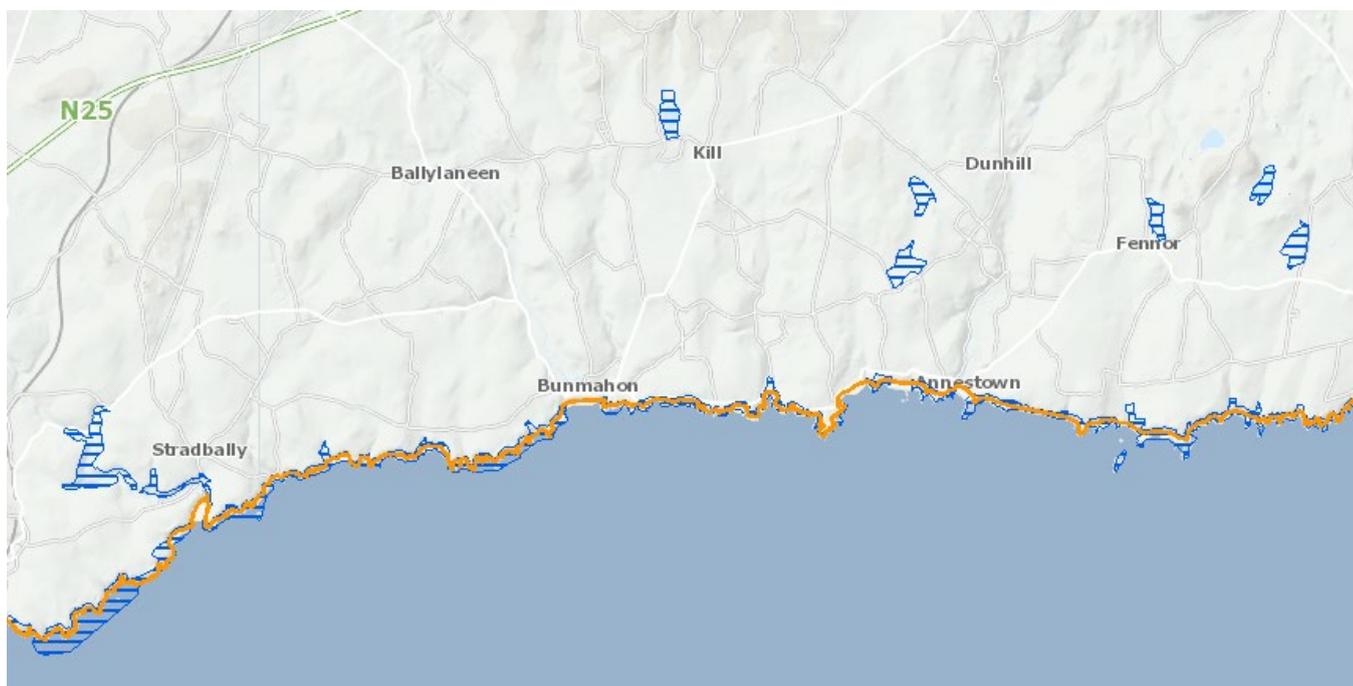
Figure 12: NPWS Designated Sites – Mid-Waterford SPA



Source: <http://webgis.npws.ie/npwsviewer/>

The NPWS has not designated any sites within the Copper Coast as a *National Park*, *Special Area of Conservation (SAC)*, *Natural Heritage Area (NHA)* or *Wildfowl Sanctuary*. There are however a number of proposed *NHAs* (pNHAs), which were published on a non-statutory basis in 1995, but have not since been statutorily proposed or designated. These sites are subject to limited protection, in the form of agri-environmental farm planning schemes; NPWS approval before payment of afforestation grants on pNHA lands and recognition of the ecological value of pNHAs by Planning and Licencing Authorities. pNHA sites include Stradbally Woods, Ballyvoyle Head to Tramore, Ballinlough, Lissaviron Bog, Castlecraddock Fen, Fenor Bog, Islandtarnsey Fen and Carrickavrantry Reservoir & Marsh.

Figure 13: Proposed Natural Heritage Areas



Source: <https://maps.biodiversityireland.ie/>

The 13ha Fenor Bog is owned and maintained by the Irish Peatland Conservation Council (IPCC) in partnership with the local Móin Fhionnúrach Development Association (MFDA). One of only 13 peatlands in the County it was designated as Waterford's first National Nature Reserve in 2004. Fenor Bog is a naturally regenerating fen habitat, extremely rare nationally and internationally, supported by plentiful, unpolluted groundwater and air. It has a rich biodiversity with over 225 plants and animals and is a refuge for some of the only occurrences of plant and animal species to be found anywhere in the county of Waterford. The site is accessible by a 500m boardwalk which tracks through the variety of the habitats present on the fen and allows visitors to discover its wildlife secrets. It has been described as the best dragonfly site in Waterford and supports *Damselfly*, *the Green-veined White Butterfly*, *the Small Tortoiseshell Butterfly*, *the Speckled Wood Butterfly*, *Orange Tip Butterfly*, *Garden*

Tiger Moth, Water Scorpion, Black Slug and Whirligig Beetle. The bog also contains breeding birds such as *Snipe, Cuckoo, Skylark, Sedge Warbler, Stonechat, Reed Bunting, Barn Owls* and the *Short-eared owl.* *Horsetail, Bulrush, Bog Cotton, Sundew, Bog Bean, Valerian, Tormentil, Ragged Robin Heath Spotted Orchid* and *Angelica* are prominent amongst its plant species.

4.9 Integrated Constructed Wetlands

One of the most noted environmental features of the Copper Coast are the Integrated Constructed Wetlands (ICW) developed in the Anne Valley. Originally developed in 2000 in partnership between the community, local landowners and WCCC, they are a sustainable wastewater treatment system developed for the purpose of treating wastewater in an environmentally-friendly way before allowing it to return to the water system. ICWs represent an eco-system based, ecologically engineered multi-disciplinary approach to the management of a diverse range of water source and flow challenges and explicitly integrate water management with its surrounding landscape and potential biodiversity – optimising natural vegetative mediated interactions between land, water and air²⁶.

The wetlands are carefully planned to integrate into the natural surrounding landscape; they enhance biodiversity and are built using natural materials like native plants, trees, soil, sand and stones. The wetlands were further extended in 2012 increasing the number of wastewater treatment ponds, allowing extra capacity to treat more wastewater from a growing local population. Since 2014, Irish Water has been working at the site in partnership with WCCC. The site is licensed under the same EPA and local authority discharge licensing system as a conventional wastewater treatment system. The success of the project is reflected in its introduction and adaptation to numerous municipal and industrial waste waters in numerous other locations in Ireland and beyond.

The benefits of the project have been well documented and include greatly enhanced water quality; long term carbon sequestration (3-5t of carbon/ha/yr.); recycling of phosphorus and nitrogen nutrients; management of flood risk; reanimation of habitats and the establishment of woodland corridors, providing shelter for livestock as well as enhanced public access. The project also successfully illustrates a wider societal benefit; being a practical solution devised and managed by an enlightened partnership of public, private and community stakeholders.

Designed to look and function as a natural wetland they also serve as an important habitat for flora and fauna such as *Ragged Robin, Flag Iris, Meadowtails, Cattails* and *Spreadwort* which attract bees and butterflies that can help with pollination. *Hawthorn, Blackberry, Holly* and *Bilberry* bushes are also growing on site. There is also a wide range of wildlife living on the site, including *Otters, Water Bats, Frogs* and *Newts.* The site also provides a perfect habitat for visiting and resident birds including *Kingfisher, Heron, Little Egrets, Cormorant, Moorhen* and *Grey Wagtail.*

²⁶ Dr Rory Harrington/VESI Environmental Ltd

Aside from its principal purpose in waste water treatment and environmental protection the wetlands are an important educational and recreational resource attracting students, environmentalists and tourists. A specially constructed *River Window* provides a viewing point to observe the river ecosystem and note changes under different conditions and seasons. Other features include a weather station and a number of educational features such as informational signage and a webcam. Alongside the wetlands is the 2.4km Anne Valley Walk linking Dunhill village to the imposing ruin of the 13th century Dunhill Castle, a popular attraction offering impressive views of the countryside. The popular walk is accessible to all ages and abilities.

4.9 Water Quality.

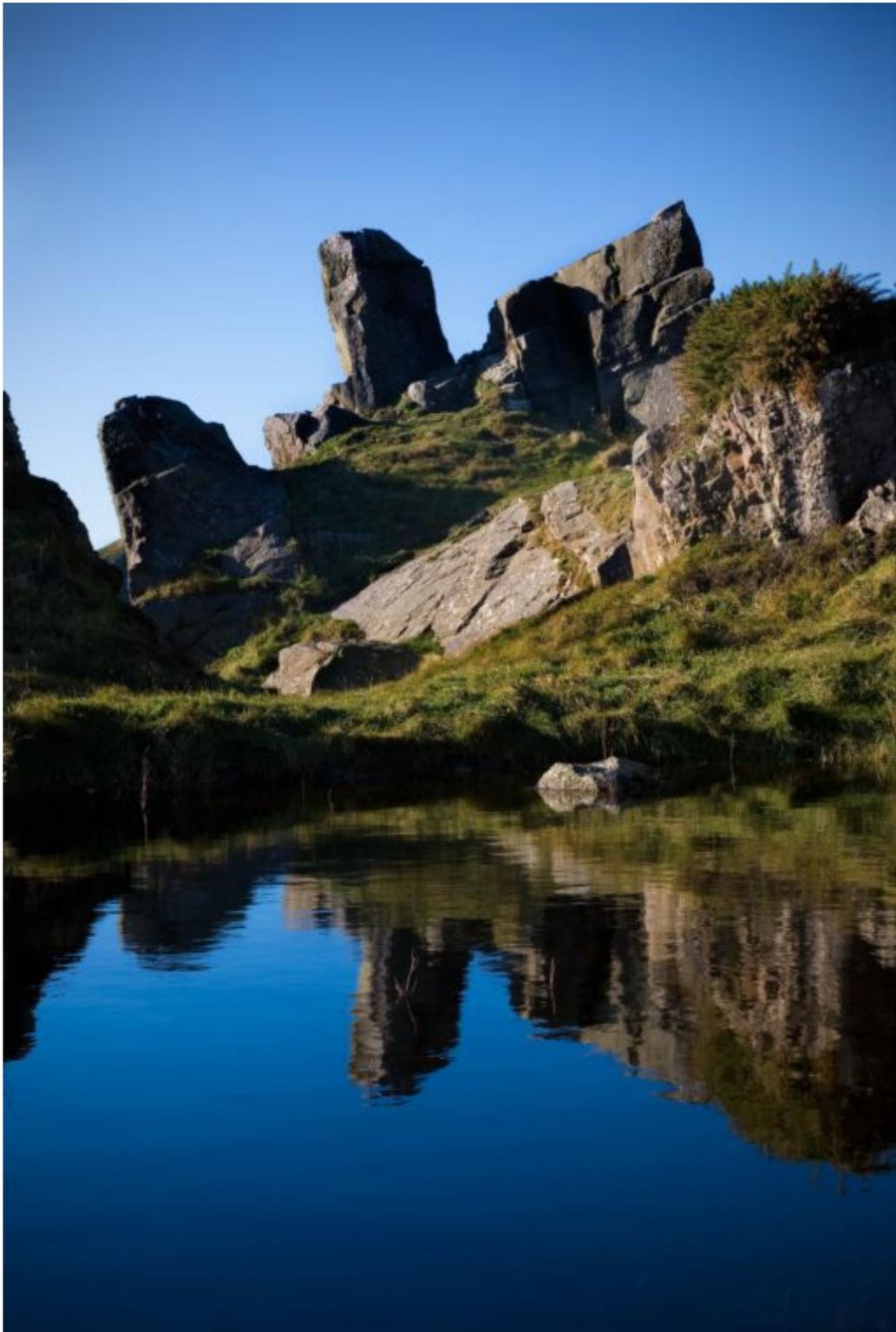
Water quality for rivers, lakes, transitional and coastal waters in or adjacent to the Copper Coast are generally of a good standard, deemed unpolluted²⁷. Bathing water quality - measured at Bunmahon - is generally deemed '*sufficient*'. However, the Environmental Protection Agency (EPA) strikes a cautionary note identifying Bathing Waters at Bunmahon as having the potential for achieving a '*poor*' classification because of pollution impacts²⁸. A pollution risk potentially arises from river inputs and agriculture in the Mahon River which drains adjacent to the bathing area. Apart from Bunmahon (one of 142 sites nationally formally identified to the EU as bathing waters), other locations can be monitored because swimming or other recreational activities take place there, although such sites rarely provide the necessary infrastructure such as car parking, safety or sanitary facilities. By using the same quality criteria as identified bathing waters, Annestown and Newtown Cove are deemed to be of '*excellent quality*', waters at Kilfarrasy are deemed '*sufficient*' while those of Stradbally, Ballyvooney and Boatstrand are indicated as '*likely to be of poor quality*' due to impacts from nearby wastewater or agricultural discharges. WCCC has the primary responsibility for the management and monitoring of designated bathing waters and for the implementation of management measures to reduce or eliminate sources of pollution. It undertakes sampling and analysis of bathing waters as well as the routine aspects of litter removal, maintenance of facilities, and the investigation of pollution events. The development of new bathing areas require the provision of supporting information including a bathing water profile which identifies the characteristics of the bathing water, its catchment area, and an assessment of potential pollution risks. Identified bathing waters would generally be those which have historically been used for bathing and where large number of bathers would be expected. These would, in most cases, have adequate car parking and facilities such as toilets, picnic areas, etc. Recent monitoring by WCCC²⁹ at sites in the period May-August 2019 along the Copper Coast suggest improvements since 2017 with waters at Bunmahon, Newtown Cove, Annestown, Boatstrand,

²⁷ Environmental Protection Agency: Water Quality in Ireland 2017, An Indicators Report

²⁸ Environmental Protection Agency: Bathing Water Quality in Ireland 2017

²⁹ <http://www.waterfordcouncil.ie/media/water/bathing-water-results/2019/Bathing%20Water%20Quality%20Results%2012-06-19.pdf>

Kilfarrasy, Ballyvooney, Ballydowane, Ballyvoyle, Garrarus deemed to be of 'excellent' quality. Waters at Stradbally Cove and Kilmurrin were of variable quality at different times throughout the year.



Rocks and small pool above Trawnamoe Beach: George Munday/Alamy Stock Photo

5. Transport & Communications Infrastructure

5.1 Road Infrastructure

The main urban centres of Dublin, Cork, Limerick and Waterford are 193km, 97km 120km and 25km distant from Bunmahon - the area’s most central settlement - by road. The Copper Coast is also located within a short drive time from the important commercial and service centres of Dungarvan and Tramore; respectively the County Town and the largest population centre in County Waterford. Profound economic and demographic change in rural Ireland strongly indicates that proximity to urban areas combined with ready access to a good quality transit network is a key element in the economic development, vibrancy and sustainability of rural areas.

The N25, a national primary road which links Cork City to Rosslare Europort via Waterford City is located to the north of the Copper Coast and is the principal route for road access via the R677 at Kilmacthomas and the R681 & R682 routes at Kilmeaden. It is part of the E30 European Route and part of the proposed Atlantic Corridor designed to link the South East with the urban settlements on the western seaboard. Drive time to Rosslare Europort and access to the south east via the N25 will be significantly improved by the 14km New Ross Bypass scheduled to open in November 2019.

Transport Infrastructure Ireland (TII) monitors traffic volumes on the N25 at three locations between Dungarvan and Waterford City. It uses the Annual Average Daily Traffic (AADT) measure to estimate the mean daily traffic volume over the course of a year. An exact computation of AADT involves dividing the total traffic volume in the year by the number of days in the year. The AADT is a measure of the total traffic at a given location but does not take account of seasonal, monthly, daily and hourly variations in traffic flow. Traffic volumes on the N25 peak for the summer months with approximately 12,800 movements per day constant over the period June to August, peaking during the late afternoon commute. Directions to the Copper Coast – in various forms - are signposted at various junctions on the on the N25 as well as at entry routes the Geopark at Dungarvan and Tramore on the R675.

Detailed data including seasonal variations, monthly flows, hourly volumes and peaks is available for each [location](#).

Table 9: Annual Average Daily Traffic

Location – N25 Skehanard	2019 ytd	2018	2017
AADT	11,559	11,032	10,805
% Heavy Goods Vehicles	6.3%	6.2%	6.1%

Location – N25 Kilmacthomas	2019 ytd	2018	2017
AADT	11,189	10,802	10,511
% Heavy Goods Vehicles	6.8%	6.8%	6.7%

Location – N25 Kilmeaden	2019 ytd	2018	2017
AADT	9,434	10,075	9,681
% Heavy Goods Vehicles	-	-	-

Source: TII, 2019

The backbone for local transit and touring within the Copper Coast is the R675 coastal touring route which links the towns of Dungarvan and Tramore and onwards to Waterford city. The network of regional and local roads throughout, are for the most part, of variable quality. Traffic volumes are not monitored specifically on regional and local roads within the Copper Coast.

Electric vehicle public charging points are not provided within the Copper Coast. However, charging points provided by the ESB and others can be found at the following locations in Waterford City and County.

Table 10: ESB Electric Vehicle Charging Points

Location	Type	Capacity/Quantity
Waterford City – Plunkett Station	Type-2 AC Socket 22kw	2
Waterford City – Fitzwilton Hotel	Type-2 AC Socket 3.7kw	1
Waterford City – Ballybricken	Type-2 AC Socket 22kw	2
Waterford City – Parnell St.	Type-2 AC Socket 22kw	2
Waterford City – Bolton St.	Type-2 AC Socket 22kw	2
Waterford City – Waterside.	Type-2 AC Socket 11kw	1
Waterford City – Millers Marsh Car Park.	Type-2 AC Socket 22kw	2
Waterford City – WIT	Type-2 AC Socket 22kw	2
Waterford City – Londis Holy Cross	CHadeMo DC 50kW Fast AC (Type-2) 43kW	1 1
Waterford City – Waterford Business	Not known	Not known

Park		
Waterford City – Butlerstown North	Not Known	Not Known
Waterford City – Nissan Ferrybank	Not known	Not known
Dunmore East – Dock Road	Type-2 AC Socket 22kw	2
Tramore – The Promenade	Type-2 AC Socket 22kw	2
Tramore – Tramore Retail Park	Type-2 AC Socket 22kw	2
Tramore – Seapoint Business Park	Not known	Not known
Dungarvan – Davitt’s Quay	Not Known	Not Known
Dungarvan – St. Augustine St.	Not known	Not known
Dungarvan - Nissan	CHAdEMo DC 50kw	1
Ardmore –Cliff House Hotel	Tesla Type 2 Accelerated 22kw AC	1

Source: esb.ie

Currently user charges do not apply but the ESB will launch a scheme to bill electric vehicle drivers for using public charging network in November 2019. Tariffs will be set at a rate to encourage home charging rather than use of the public charging infrastructure. The Government’s Climate Action Plan, launched in June 2019 commits to 936,000 Electric Vehicles on the road by 2030; a quantum leap from the 8,000 vehicles expected to be registered by 2020.

5.2 Public Transport

Bus Eireann operates a daily scheduled Expressway Route 40 service between Rosslare Europort and Tralee via Cork city with stops on the N25 at Waterford, Kilmacthomas and Dungarvan. Bus Eireann also operates a limited number of county services locally between Waterford city, Dungarvan and Tramore but do not directly service any of the settlements within the Copper Coast. Bus Eireann services are augmented by Locallink Waterford, which offers scheduled and semi-flexible services throughout the county. The 367 service operates between Tramore and Dungarvan via Fenor, Annestown, Dunhill, Kill, Bunmahon and Stradbally three times daily (*Tuesday, Wednesday and Saturday*). Approval has recently been granted from the National Transport Authority (NTA) to increase the service to four daily return services (*Monday-Saturday*). The 367A service operates a once daily service between Dungarvan and Waterford via Stradbally, Bunmahon, Kill and Dunhill, three times a week (*Monday, Wednesday and Saturday*). Stradbally and Durrow are also serviced by a once daily service to/from Dungarvan (*Wednesday and Saturday*). Return fares are €6 and persons aged 66 and over, legally resident and living permanently

in the State, are entitled to the *Free Travel Scheme* which is accepted for use of State transport services including Locallink.

5.3 Air, Rail and Port Access

Air transport accounts for 88% of all overseas visitors traveling to Ireland. The nearest operational airport to the Copper Coast is located to the west of Cork City; 90 mins drive along the N25. Cork Airport services 50 different routes and offers daily scheduled flights to numerous locations in Britain as well as direct services to *Amsterdam, Paris and Barcelona*; weekly or seasonally scheduled services to *Spain, Germany, Austria, Italy Poland, Switzerland, Portugal, Croatia, France, Poland, Hungary and Malta*. Transatlantic operations offered seasonally between *Boston and Providence* ceased in 2019. Passenger numbers at Cork Airport, which claims to be Ireland’s fastest-growing and most punctual airport, have increased by 9% to just over 2m in the first nine months of 2019 and are expected to reach 2.6m by the end of 2019; representing an 8% increase over 2018 and a 25% increase since 2015. In the period April to June 2019 almost 480,000 passengers travelled between the 10 most popular destinations serviced by Cork Airport. Of this amount Britain accounted for 58% with the London routes alone accounting for 52% of passenger volume³⁰.

Table 11: Cork Airport Departure/Arrivals

Destination	Arrivals	Departures	Total
London -Heathrow	47,472	50,284	97,756
London- Stansted	44,673	44,455	89,128
Malaga	24,723	27,327	52,050
Faro	19,700	23,088	42,788
Amsterdam - Schiphol	18,826	19,328	38,154
Paris - CDG	18,493	19,444	37,937
London- Gatwick	16,372	16, 108	32,480
Lanzarote	14,622	15,192	29,814
Manchester	14,004	14,452	28,456

³⁰ CSO; 2019

London -Luton	14,418	13,471	27,899
Total			476,452

Source: CSO; 2019

In the same period Dublin Airport, located almost 200km distant from the Copper Coast, handled almost 15.5m passengers to and from over 200 destinations worldwide. Waterford Airport, located at Killowen, 8km south of Waterford city and 15km from the Copper Coast no longer offers scheduled passenger services. At its peak in 2007, it handled over 30,000 passenger movements per annum. Thereafter numbers steadily declined until its sole remaining service to *London (Luton)* ceased in 2016. In June 2019, the Government announced funding of €5m towards a proposed €12m capital investment supported by private and local authority interests, the objective of which is to restore scheduled passenger services to the airport. Proposed works including a 500m extension to the runway would provide for up to 1700 flights per annum and facilitate larger Boeing 737 and Airbus A320 aircraft. A timeline for development is not known at this time.

The nearest Rail Terminus convenient to the Copper Coast is situated in nearby Waterford city; with Cork Station 90 minute drive to the west. Each offers daily scheduled inter-city services. In 2018, passenger arrivals at Waterford averaged 502 daily; a 14.8% increase since 2012. Passenger arrivals at Cork for the same period averaged 4108 daily; a 26.8% increase over the same period³¹.

Travel by ferry accounts for 8% of all overseas travel to Ireland, the bulk of which are to/from UK ports. Rosslare Europort and the Port of Cork (Ringaskiddy) and are located either end of the N25 roughly equidistant from the Copper Coast. Daily scheduled passenger and car ferry services operate from the former to *Britain* and *France* while the latter offers passenger and car ferry services once weekly to *France* from March to November. A twice weekly overnight service from Cork (Ringaskiddy) to *Santander* commenced in 2018. A three-time weekly, *Cork-Plymouth-Vigo* year round service is also planned for 2020; doubling ferry capacity between Ireland and Spain. In total, 919,000 passengers or 34% of all ferry passengers travelling to and from Irish ferry ports disembarked/embarked at these locations in 2018:

Table 12: Passengers¹ disembarking/embarking classified by port and route, 2018

Destination	Britain	France	Other
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³¹ NTA, National Heavy Rail Census Report 2018

Cork		93,000	18,000
Rosslare	267,000	257,000	284,000
Total	267,000	350,000	302,000

Source: CSO; 2018

The Port of Waterford does not accommodate scheduled passenger or car ferry services. However, it does host a growing inbound cruise operation. Ireland’s cruise industry remains buoyant with a 19% increase in passengers recorded in 2018; a year in which 300 cruise ships and 398,505 passengers visited Irish ports. Cork – the second most popular port of call has seen its passenger traffic increase by over 30% since 2014 – and anticipates continued future growth beyond 2019. In 2018, the ports of Cork and Waterford and Rosslare hosted 111 cruise ships with over 175,000 passengers, the bulk of whom arrived weekly between the months of May and September.

Table 13: Cruise Ship Arrivals by Port 2018

Port of Call	Number of Cruise Ships	Number of passengers
Cork	93	157,669
Waterford	18	17,527
Total	111	175,196

Source: CSO; 2019

Combined, the ports of Cork and Waterford account for 37% of cruise calls and 44% of passenger visits nationally. Despite its importance to the tourism trade and a direct economic value to Dublin city of €50 million, Dublin Port has announced cruise shipping restrictions for the period 2021-2028. This will have the effect of reducing the 150 visits recorded during 2018 to only 80 cruise ship calls/berths annually from 2021. Specifically this will limit berths to two large cruise ships per week during the summer season, only one large liner per week during the winter season and no turnarounds through homeporting operations with roundtrips.

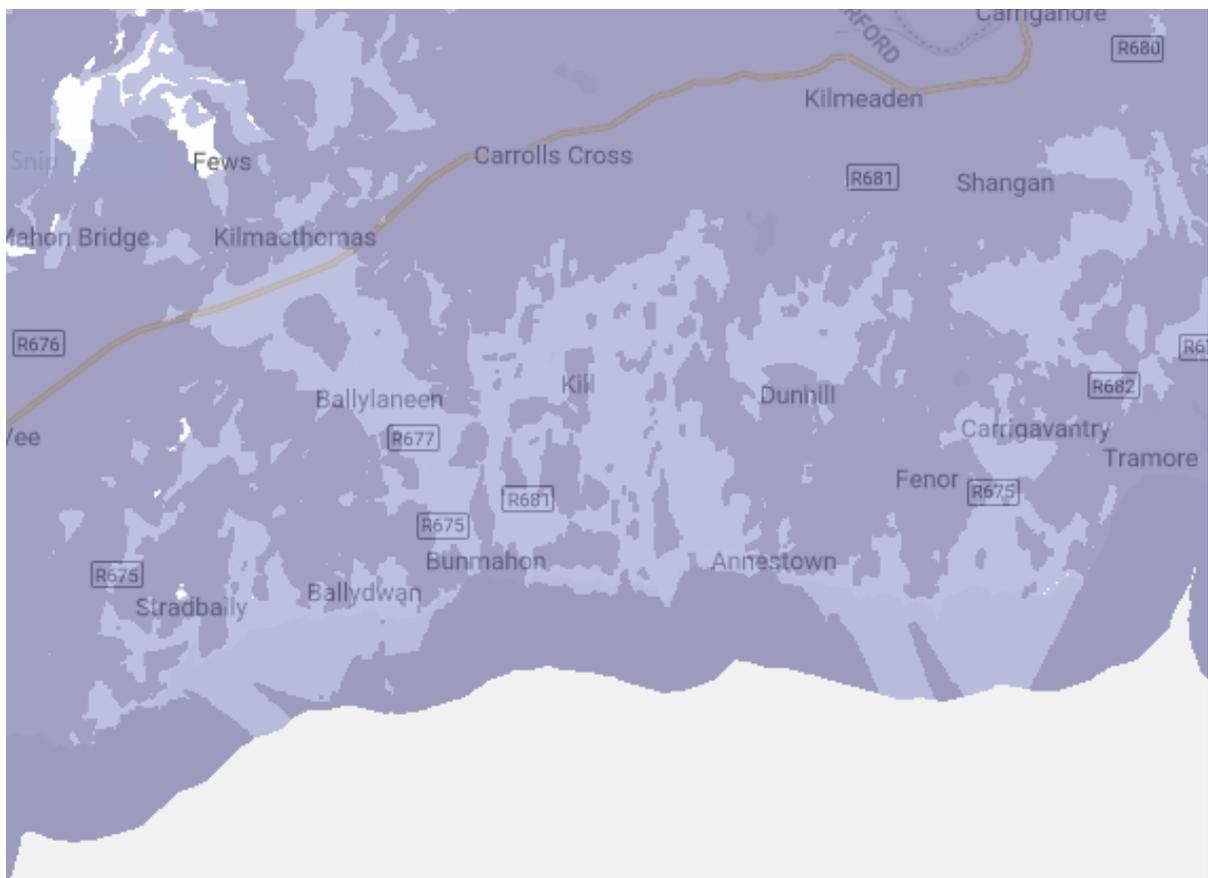
A daily scheduled year round car ferry service operates on the Waterford Estuary between Ballyhack, Co. Wexford and Passage East Co. Waterford. This facilities the shortest drive-time between the Hook

peninsula and South Wexford to/from East Waterford, obviating the need for the longer route through New Ross and Waterford City.

5.4 ICT & Telecommunications Infrastructure

The Commission for Communications Regulation (COMREG) asserts that Ireland’s 92% population coverage for the 4G network exceeds the EU average; its mapping suggests that the Copper Coast has reasonable 4G coverage – defined as a strong signal with good data speeds. Such coverage, whilst not uniform, does facilitate internet access via the mobile network enabling download speeds between 10 and 20 Mbps. Telecoms providers Vodafone and Imagine plan to launch more advanced 5G networks, promising download speeds of 1000Mbps, in Ireland in 2020.

Figure 14: 4G Mobile Phone Coverage

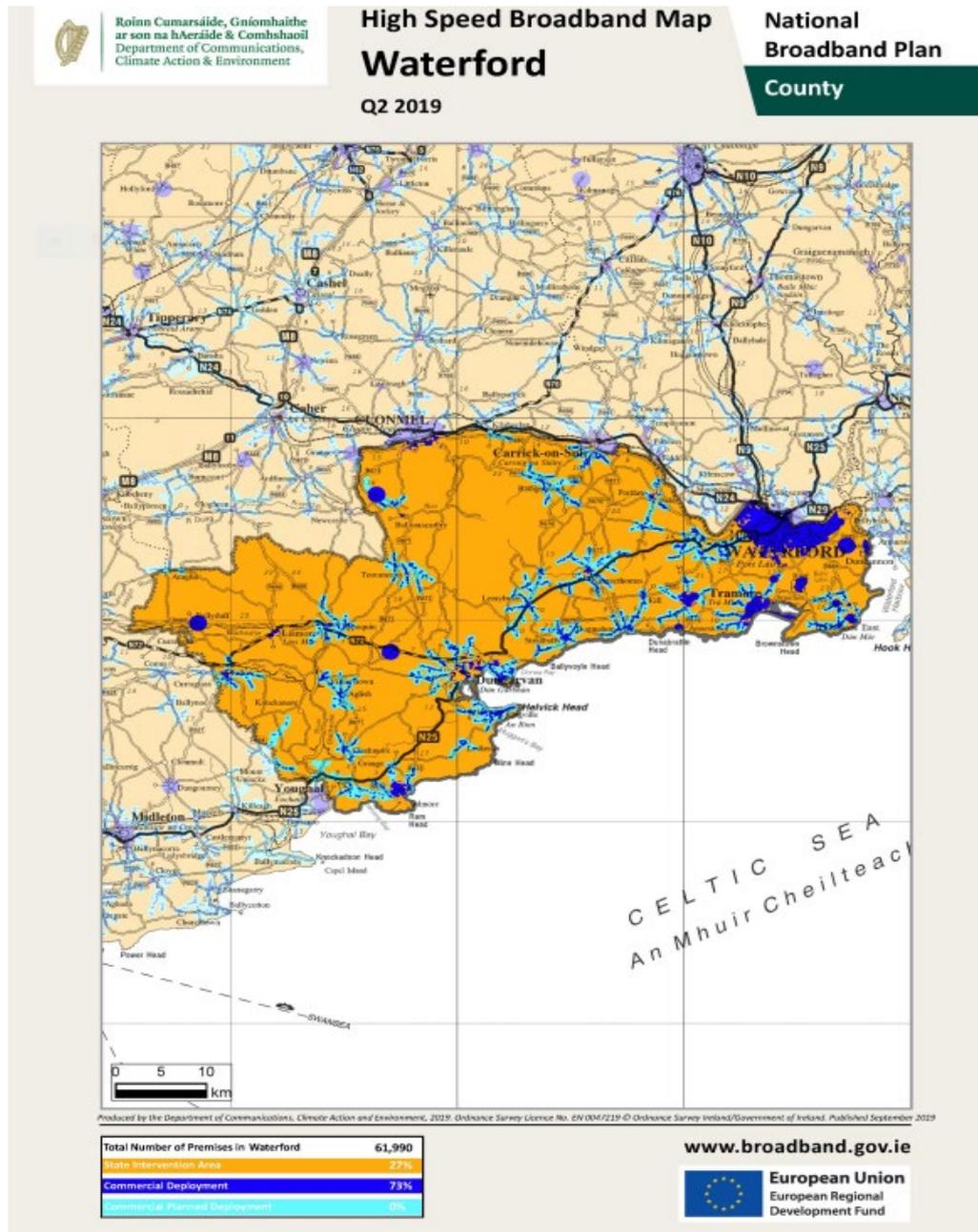


Source: EIR; 2019

Initially launched in 2012, the €3bn *National Broadband Plan (NBP)* is a Government-wide initiative committed to deliver high speed broadband services to all businesses and households in Ireland, regardless of location. The NBP defines high speed broadband as a minimum speed of 30Mbps

download and 6Mbps upload but the NBP is expected to deliver speeds of up to 150Mbps by fibre broadband in Year One to over 500,000 homes, farms and businesses; up to 2% of these will however be serviced by wireless systems. The Government intends that the NBP will be delivered through a combination of commercial investment by the telecommunications sector and a state intervention in areas where commercial providers acting alone will not provide the service. The fixed line fibre broadband coverage map for County Waterford as of October 2019 is as follows:

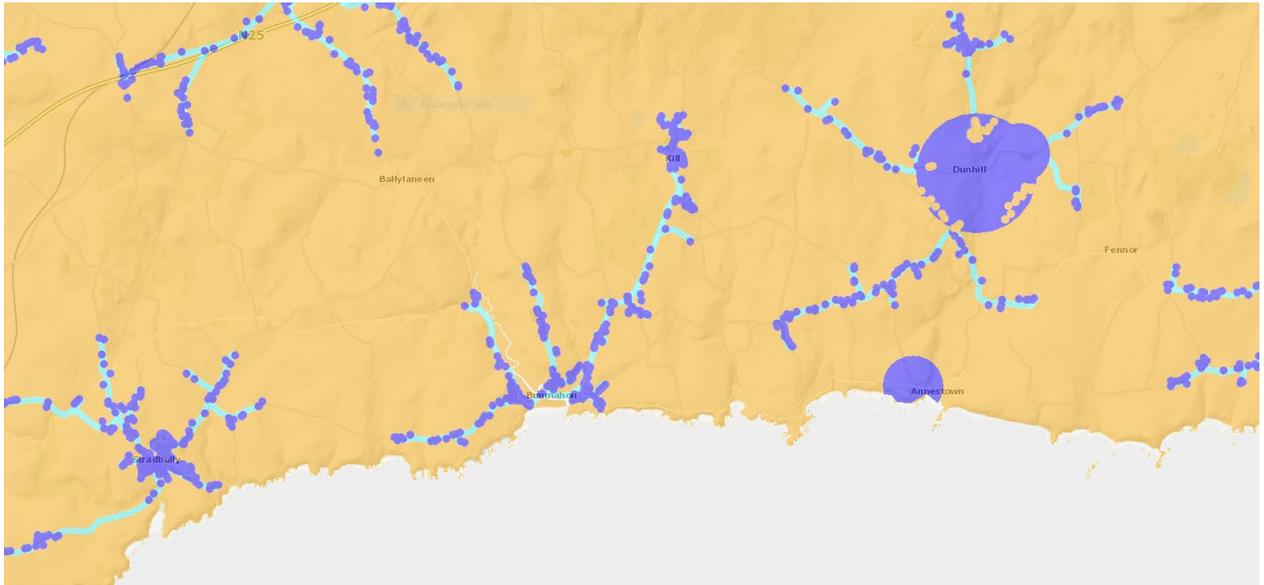
Figure 15: Fixed Line Broadband



Source: Department of Communications, Climate Action and Environment, 2019

Mapping provided by the Department of Communications, Climate Action and Environment (DCCA) indicates that most of the main settlements and immediate environs are serviced by commercial broadband operators for fixed line fibre broadband. However, rural areas requiring fixed line fibre broadband outside of these locations will require intervention under the long awaited and much delayed NBP. The fixed line fibre broadband coverage map for the Copper Coast as of October 2019 is as follows:

Figure 16: Broadband Provision and National Broadband Plan Intervention



Source: www.dcca.gov.ie; 2019

6. Strategic Analysis

This situation analysis is a systematic evaluation of the social, economic, environmental, political, demographic, technological and behavioural information and trends likely to shape and influence tourism, recreation and amenity development in the Copper Coast. The situation analysis takes care to distinguish between the influence and effect of both internal and external forces; each of which require careful attention and while internal forces, for the most part, can be addressed locally, external forces reflect conditions and issues in the wider economy.

Figure 17: SWOT Analysis Logic Model



Source: Google Images

The SWOT Analysis takes account of the location, characteristics and current tourism baseline of the Copper Coast; the suggestions and contributions offered by stakeholders as well as of the dynamics and trends in the tourism industry. It establishes the area's current *strengths*, is intended to build upon future *opportunities*, recognises its existing *weaknesses* and seeks to mitigate potential *threats*. It provides an evidence basis which shapes the objectives and development actions of the CCOS.

6.1 Strengths

The existence of enabling EU, national, regional and local development strategies and resources to support tourism, recreation and amenity development.

The provision of significant development support and financial resources from Waterford City & County Council, Waterford LEADER Partnership, FLAG South East and Fáilte Ireland to support community and enterprise initiatives, *placemaking* and public realm development.

Strong, pro-active community and voluntary engagement with longstanding experience of and responsibility for planning, resourcing and implementation of local projects.

Strong name recognition of the Copper Coast with further potential for *Destination Management* and *Brand Development* strategies.

The area is one of 3 UNESCO Global Geoparks on the Island of Ireland and one of 147 Global Geoparks worldwide.

An outstanding landscape and natural environment with a compelling diversity and richness of biodiversity, antiquity and heritage.

Strategic location as a touring route on the coastal strip between the towns of Tramore and Dungarvan.

Proximity to established and emerging high profile tourist attractions and investment priorities such as the Waterford Greenway, Mount Congreve House and Gardens and Waterford City.

An exceptionally strong endowment and stewardship of its natural, environmental, ecological and coastal resources.

A coastal setting with land and water-based resources, facilities and amenities suitable for active or passive recreation.

Resilient, active and engaged communities that reflects a culture of economic and community self-reliance, leadership and innovation.

An informed and engaged community that understands safeguards and interprets its architectural legacy, heritage and built environment.

A well-documented social history, cultural and industrial heritage shaping a distinctive character and sense of identity.

A rich maritime heritage that offers considerable possibilities for tourism development through content creation, interpretive storytelling and thematic experience development.

Strong collaboration and networking potential with national and international stakeholders.

Includes protected/designated heritage and *Natura 2000* sites of national and international significance comprised of *Special Areas of Protection (SPA)* and *Proposed Natural Heritage Areas (pNHA)*.

Proximity to the cities of Cork and Waterford Cities with accessibility to Cork Airport and Rosslare Europort via the N25 national secondary route and onward connectivity to Britain and Europe.

6.2 Weaknesses

Small scale of the territory, its settlement and resident population.

A lack of scale and critical mass in the tourism offering most particularly in the availability and range of tourism accommodation, visitor attractions and facilities.

Limited range of fee-charging visitor attractions, weather independent and family oriented activities.

Tourism seasonality and the concentration of visitor numbers and revenues within relatively narrow tourist market segments.

Tourist transience leads to poor visitor *dwell time* and the consequent loss of revenues arising from limited destination management and the narrow range of tourist and retail products on offer.

Limited community-led strategic thinking or reflection on the medium-term potential of tourism development of the Copper Coast.

The comparatively low profile of County Waterford as a tourist destination and the limited attempts, thus far, by stakeholders to define and promote a countywide tourism proposition.

A failure by local tourism interests and associated stakeholders to speak collectively with *one voice*.

Limited engagement and interaction by local tourism interests with representative networks, advocates and decision-making structures.

The absence of a comprehensive *Destination Management Strategy* in the Copper Coast.

The reliance on tourist accommodation located in adjacent or competing destinations such as Dungarvan, Ardmore, Waterford, Cork City, Youghal, Midleton and Wexford.

The Copper Coast does not leverage any significant economic impact from visitors to and users of the Waterford Greenway.

Despite the profile and name recognition of the area generally, specific establishments, attractions and facilities within it are not referenced or do not feature prominently in national, regional and local tourism promotions and brochures.

The location of the Copper Coast on the southwestern periphery of the region designated as Ireland's Ancient East.

6.3 Opportunities

The development and resource opportunities provided by the *Ireland 2040* Plan and the National Planning Framework for rural economic and place-based development, with particular emphasis on the *Rural Regeneration and Development Fund (€1bn)*; and the *Climate Action Fund (€500m)*.

The place-based approach, development themes and priorities, enabling measures and implementing strategy set out in the *Regional Economic and Spatial Strategy* for the development of the Southern Region over the medium to long term.

Alignment with national policy initiatives to support the development of regionally-based tourism propositions centred on experiential, educational heritage, sustainable development, eco-tourism, active adventure and outdoor recreation.

Capacity and scope to build a stronger relationship and to add greater value to the skills and resources of public or third sector development agencies and institutions.

Potential to build economic scale and market reach through active collaboration in product, skills and market development with other locations in Waterford and in the adjacent counties of Cork and Wexford.

The enabling strategy and focus on tourism development in Waterford as reflected in the continuing development of flagships attractions such as the *Waterford Greenway*, *Viking Triangle*, *Waterford Treasures* and *Mount Congreve House and Gardens*.

The product development, networking and marketing opportunities provided by the IAE brand, Visitor Experience Development Plans and supporting strategy and resources.

Strategic and sustainable development of the *Blue Economy* to drive investment in tourism; amenity; conservation; climate change mitigation; renewable energy; food and fisheries; marine minerals, supplements, cosmetics, ingredients and nutraceuticals,

The continued and sustained growth of outdoor recreation, active adventure and experiential tourism in Ireland and the growing sophistication of supporting policy, resource and funding initiatives.

The opportunity for the Copper Coast to meet the recreation and amenity needs of urban dwellers in adjacent second tier cities such as Cork and Waterford; locations where residential housing, infrastructure development and economic activity will be focused.

The development of *smart village* strategies where social innovation combined with adoption of new technologies is used to address social, economic and environmental needs in the area.

The digitalisation of tourism and the potential for digital and social media to further build social and community engagement as well as to promote and showcase the areas assets and attractions.

Alignment of the areas vision and strategic development with the United Nations *Sustainable Development Goals* (see appendix 3).

Advocacy and leadership for sustainable development, zero waste, circular economy, low carbon, climate adaptation and mitigation practices in the management and development of environmental assets and resources.

Competitive positioning arising from innovative environmental management, landscape stewardship, carbon reduction, climate mitigation and adaptation strategies.

The potential for inter-village collaboration and networking to build tourism scale particularly in relation to environmental management and heritage activities.

Share the practical experience and knowledge gained from participation in the *National Tidy Towns Competition* and *Heritage Council* initiatives to support village development, biodiversity and sustainable development and the presentation and development of the public realm.

Improved physical and virtual connectivity arising from targeted investments (*Ireland 2040 Plan* and the *National Planning Framework*) to enhance the transport and communications infrastructure.

6.4 Threats

Poor or limited engagement with regional and countywide tourism development and promotional initiatives resulting in a failure to develop the type and nature of tourism infrastructure appropriate to market needs.

Demographic, economic and behavioural trends towards urbanisation and a continued attrition of population, skills and services in rural areas.

Lack of knowledge and understanding of the sentiments and dynamics that determine tourist decision making and behaviour.

Failure by stakeholders to collaborate and share knowledge, expertise and resources in order to achieve scale and critical mass in product development and promotion.

Greater competition for limited resources and the potential failure by the Copper Coast to harness its unique assets and opportunities for social, economic and environmental development.

Public funding for the planning, development and operation of community-led initiatives made available on a highly competitive basis, often subject to themed *calls* on an irregular basis.

Poor alignment of local development objectives, actions and targets with national, regional and sectoral development strategies.

Failure to define, create and sustain a unique or inimitable competitive advantage that adds value to the tourism offering in the County and wider region.

Non-traditional tourism locations with a distinctive competitive vision and market positioning attuned to customer needs developed in the wider region and elsewhere throughout the state.

Weakened social capital, the diminution of community engagement, loss of volunteerism and the ever-growing governance and compliance burden for community and voluntary initiatives.

Spiraling insurance premium costs as well as actual and threatened claims litigation curtails the continued provision of many active outdoors, sports, recreation and general community activities.

Poor environmental stewardship, inappropriate or unsustainable development and threats to landscape, habitats and ecosystems.

Fossil fuel dependency, greenhouse gas emissions (GHG) and the failure to mitigate and/or adapt to the effects of climate change.

Threats to visual amenity and wildlife habitats arising from the [potential development of the World's largest offshore windfarm](#), 5km from the Copper Coast.

Deficiencies and limitations in transport, communications and sanitary infrastructure.

De minimis regulations limiting the amount of public funding available to community and enterprise project applicants within a given three year period.

Loss of competitiveness in tourism due to rising input costs, an increased VAT rate and weakened sterling/euro exchange rate.

CSO data for summer 2019 indicates that tourist visitor numbers from key source markets are showing marked and sustained declines when measured by year-on-year comparisons.

Persistent decline in visitor numbers from the British market – Ireland’s largest overseas tourism market

Fears of global downturn and recession in key economies and source markets in the short term with added downside risks arising from *Brexit*, weakness and poor growth prospects in the Eurozone economies, trade wars and the imposition of tariffs.

Changes in EU development priorities, budgets, exchequer contributions and regulations with direct adverse effects for Ireland on funding for the *Common Agricultural Policy (CAP)*; *Cohesion and Regional Development (ERDF)* funds.



Tankardstown Copper Mine: Robert Harding/Alamy Stock Photo

7. Proposed Objectives and Actions

Having regard to the issues raised in the situation analysis, the objectives proposed for the development and promotion of the Copper Coast as a vibrant tourism, heritage and recreation destination are as follows:

- To enhance and sustain robust structures for community-led development which will represent and advocate a shared social, economic and environmental vision for the communities of the Copper Coast.
- To promote active citizenship, community participation through collaboration, networking and resource-sharing in planning and development.
- To enhance social, economic and environmental wellbeing and resilience through investments in smart, placemaking strategies.
- To build scale, complement and add value to *Waterford City, Dungarvan, Tramore, the River Blackwater, the Comeragh Mountains and the Waterford Estuary*, which collectively comprise the County Waterford tourism offer.
- To respect the character, heritage and traditions that defines and showcases a *sense of place* within and between communities in the Copper Coast.
- To create and sustain high quality, innovative, knowledge and skills-based competences in the in the design, management, use and protection of the natural environment.
- To mainstream climate mitigation and adaptation priorities in **1)** building design and maintenance; **2)** in the management of village assets, infrastructure and public realm; and **3)** in the management and protection of environmental resources.
- To create seamless physical connectivity to larger urban settlements through investment in infrastructure which favour soft modes such as walking and cycling.
- To achieve optimal usage, benefit and commercial return from prior publicly funded investments in the social and community infrastructure.
- To devise *smart strategies* through digital innovation that will enhance the social, economic and environmental fabric of the area.
- To match development objectives, capabilities and projects locally with the development priorities, enabling policies and resource capabilities of the EU, national and local government.

To support the 11 proposed objectives set out in the CCOS, 5 specific, mutually supportive development pillars, are proposed; each of which is limited to 8 development actions in order to achieve to ensure balance, focus and clarity. In total, this iteration of the CCOS focuses on a total of 40 interlinked, scalable and incremental development actions through which the Copper Coast’s tourism, heritage and recreation assets and resources can be aligned to achieve an improved quality of life and quality of place for residents and visitors alike. All development actions are aligned and accord fully with national, regional and local strategies for social, economic and environmental development with each action matched to enabling organisations or agencies capable of providing leadership, support and/or resources as appropriate. Furthermore, the development actions are future oriented, taking account of the areas potential; visitor sentiment and market acceptance as well as of the likely impact of demographic, economic, behavioural, technological changes and the political, economic and environmental imperatives that will shape rural Ireland more generally over the period 2020-2024.

Figure 18: Development Pillars



The CCOS draws particular attention to the concepts of *Placemaking* and *Destination Management*.

Placemaking refers to the collaborative process by which public spaces and civic amenities are shaped to maximise possibility, use and shared value. It can be categorised individually or in combination as *Standard*, *Strategic*, *Creative* or *Tactical*. Regardless of form, it prioritises good design and effective

planning to enhance creativity and patterns of use that reflect the physical, cultural and social identities that define a place or community. Community participation is central to placemaking and explicitly acknowledges that the **Community is the Expert**, inspiring its citizens to collectively reimagine and reinvent the how local assets, amenities, facilities, events, identity and heritage can be enhanced and showcased to improve social capital, health and well-being.

Destination Management is the co-ordinated management of all elements that make up a tourism destination (attractions, amenities, access, marketing, pricing, heritage, intangible assets, etc). It takes a strategic approach to combine and better manage heretofore diverse elements in the destination. Tourism is often complex and fragmented; the quality of visitor experience shaped by a variety of factors and interactions. Therefore, effective planning and management is required in order to shape optimal visitor appeal and deliver sustainable outcomes and impacts as well as to actively manage the impacts of tourism on the destination’s environment, economy and community; maintaining and enhancing the destination’s resources for the present and future needs of both tourists and the host communities. Collaboration is central to the concept of Destination Management; a key principle being the alignment of different interests, all working towards common goals to ensure the present and future viability and integrity of the destination.

The CCOS its development pillars, actions, enablers and the suggested timeframe for implementation is as follows:

Table 14: Pillars and Actions

***Enablers are defined as potential champions, advocates and funders drawn from state agencies, the public, private and community sectors that will be instrumental in initiating, facilitating, resourcing or otherwise enabling project implementation through lead or support roles. A glossary of acronyms used is contained in appendix 6.**

Pillar	Description of Action	Enablers*	Implementation
1.0 Advocacy & Representation.	Local stakeholders and agency representatives should convene annually to discuss the <i>Copper Coast Opportunity Study</i> . The primary objective being the agreement development priorities on a collaborative basis, the pooling of resources and expertise to support their implementation and the alignment and integration of these development priorities with relevant EU, national, regional, county and sectoral development plans and support structures.	WCCC, WLP, FI, FLAG, LEO, DFBA, CCG, community orgs, private sector, etc	Q1 2020

<p>1.1 Advocacy & Representation</p>	<p>Local stakeholders should critically appraise the potential to designate and resource a local organisation as a Tourism Destination Management Organisation (TDMO) for the Copper Coast. In turn, this function would be supported by the network of existing community organisations serving collectively as a Development Forum. Central to the role of the Tourism Destination Manager is the coordinated management of the individual elements that comprise the wider tourism product including attractions, amenities, events, wayfinding, heritage, environment and the public realm; the strategic linking of which will define the tourism vision and proposition for the area. Furthermore, the Tourism Destination Manager should be the organisation that manages, coordinates and animates area-wide tourism marketing and promotion for local stakeholders in association with Fáilte Ireland, WCCC and other agencies.</p>	<p>WCCC, FI, WLP, FLAG, LEO, DFBA, CCG, community orgs, private sector, etc</p>	<p>2020-2021</p>
<p>1.2 Advocacy & Representation</p>	<p>Given the strategic value to tourism development of a number of development initiatives currently planned for the Copper Coast, the TDMO working in tandem with the Development Forum, area-based or thematic working groups should ensure that diverse project activity is coordinated, aligned and monitored in line with the objectives of the Opportunity Study. Key performance indicators (KPIs) should be agreed, in order to ensure that projects prioritised for agency or funding support deliver the expected outcomes and impacts.</p>	<p>WCCC, FI, WLP, VW, FLAG, LEO, DFBA, CCG, TDMO, community orgs, private sector, etc</p>	<p>2020-2024</p>
<p>1.3. Advocacy & Representation</p>	<p>Accommodation providers, attractions, activities, events and the wider community active in or supportive of tourism development must collaborate and actively engage with regional, local and themed tourism marketing networks and implementation structures in order that its tourism offer is represented and that the Copper Coast builds scale and enhances reach and access to overseas and domestic markets.</p>	<p>WCCC, WLP, FI, VW, FLAG, LEO, CCG, TDMO, community orgs, private sector, etc,</p>	<p>2020-2024</p>
<p>1.4 Advocacy & Representation</p>	<p>Local stakeholders must collectively engage with Fáilte Ireland and WCCC to ensure that the area and its tourism, heritage, recreation, amenity and environmental assets and market offer are structured, coherent, fully aligned and integrated with the 1) the key themes and itineraries of the Ireland’s Ancient East Brand and its supporting Visitor Experience Development Plans (VEDP). Particular attention should be paid to the new <i>Maritime Gateway</i> VEDP. 2) The priorities, actions and implementing structures and budgets of the countywide WCCC tourism strategy.</p>	<p>WCCC, WLP, FI, FLAG, LEO, CCG, TDMO, community orgs, private sector, etc</p>	<p>2020-2024</p>

<p>1.5 Advocacy & Representation</p>	<p>Local stakeholder interests to actively engage in the public consultation and development of the 1) Waterford County Development Plan 2) Local Economic and Community Plan (LECP) 3) County Waterford Local Development Strategy (LDS). This will be essential to ensure that their agreed development priorities are fully coordinated and aligned with countywide objectives, strategies and actions for social, economic and environmental development.</p>	<p>WCCC, WLP, FI, FLAG, LEO, DFBA, CCG, TDMO, DREL, community orgs, private sector, etc</p>	<p>2020-2022</p>
<p>1.6 Advocacy & Representation</p>	<p>Local stakeholder interests should combine to formally ratify the United Nations Sustainable Development Goals (SDGs) and plan a supporting programme of activities and events in the Copper Coast in order to embed the 17 principles in priority local initiatives.</p>	<p>community orgs, private sector,</p>	<p>2020-2024</p>
<p>1.7. Advocacy & Representation</p>	<p>Local stakeholder interests should consider strategic international affiliations which might include 1) participation in the European Destination of Excellence Network (EDEN); the key feature of which is the commitment to social, cultural and environmental sustainability of tourism and whose objective is to share best practice identified in emerging destinations. 2) Affiliation to ECOLISE - the European Network for Community-led initiatives and Climate Change and Sustainability. Each initiative would enhance and facilitate improved developmental, research, best practice exchange and networking and collaboration opportunities.</p>	<p>CCG, TDMO, DFBA, community orgs, private sector,</p>	<p>2021-2022</p>
<p>2.0 Product Development</p>	<p>A local experience audit should be conducted to assess the tourist infrastructure, the range of supporting and ancillary experiences and market opportunities. Analysis is required as to how well existing local experiences are aligned to the themes and itineraries of the Ireland's Ancient East brand. The audit should also explore how to maximise existing infrastructure and reduce the need for capital expenditure where appropriate. The audit should include an environmental impact component where appropriate in order to identify potential sustainability concerns and impacts. Particular attention should be paid to engagement with Fáilte Ireland to identify, define and promote the local attractions, facilities and events that represent <i>Core Attractions</i> or <i>Hero Products</i> capable of supporting the iconic or flagship experiences in the <i>Maritime Gateway</i> VEDP.</p>	<p>WCCC, FI, WLP, VW, HC, FLAG, WSP, NTO, community orgs, private sector etc</p>	<p>2020</p>

<p>2.1 Product Development</p>	<p>Critically appraise and implement as appropriate the recommendations of the <i>Earthroute Walking Potential of the Copper Coast Study</i>; the objective being to address infrastructural deficits and gaps and assess new opportunities in the development of an active outdoors, recreation, health and well-being strategy. This should seek to build scale and connectivity through a comprehensive linked network of trails and cycle routes through river valley, coastal pathway and village trails within the Copper Coast but also strategically connect to other high profile routes and trails such as the Waterford Greenway and Eurovelo 1 at Kilmacthomas and/or other suitable locations on the N25, as well as to Mount Congreve House and Gardens and Waterford City.</p>	<p>WCCC, FI, WLP, VW, HC, FLAG, WSP, NTO, community orgs, landowners, private sector etc</p>	<p>2020-2024</p>
<p>2.2. Product Development</p>	<p>Selected local community and sporting facilities, amenities, resources and locations should be evaluated and where appropriate to market needs, upgraded and re-purposed as trail head and/or accommodation facilities in order to support and build scale for an active outdoors, recreation or health and well-being strategy.</p>	<p>WCCC, FI, WLP, VW, HC, FLAG, WSP, NTO, CCCO, community orgs, landowners, private sector etc</p>	<p>2022-2024</p>
<p>2.3 Product Development</p>	<p>Community and agency stakeholders should collaborate annually to identify and prioritise opportunities for new and existing land and water-based recreation and amenity infrastructure & facilities seeking for capital support under measures 1, 2 & 3 of the <i>Outdoor Recreation Infrastructure Scheme (ORIS)</i>. Investments should align with recommendations and priorities identified in the <i>Earthroute Walking Potential of the Copper Coast Study</i>.</p>	<p>WCCC, FI, WLP, VW, WSP, NTO, CCCO, community orgs, landowners, private sector etc</p>	<p>2020-2024</p>
<p>2.4 Product Development</p>	<p>As part of its programme of upgrading and network development the Copper Coast Geopark Heritage Centre should join the Irish Museums Association and subsequently seek to achieve Museum Programme Standards for Ireland (MPSI) accreditation. Consideration might also be given to expanding its visitor offering through the development of its archive to include online state-run or community ancestry and genealogy databases.</p>	<p>CCG, HC, IMA</p>	<p>2021-2022</p>
<p>2.4 Product Development</p>	<p>Evaluate and refine a multi-phased visitor <i>Wayfinding</i> strategy to optimally manage and facilitate pedestrian, cyclist and vehicular movement to regularly used, important or priority points of use/interest in the area. Whilst distinct from existing walks and trails it should link and align with same. Newly devised and rebranded directional signage, mapping, noticeboards, interpretative and information panels, seating, etc to be erected at key decision making points and junctions</p>	<p>WCCC, FI, WLP, VW, TDMO, CCG, WSP, NPWS, OPW, NTO, community orgs, landowners, private sector etc</p>	<p>2020</p>

	in the area. The <i>wayfinding strategy</i> should be multi-lingual where possible and be accessible and inclusive to all. The <i>wayfinding strategy</i> should retain its style and coherence through successive phases and be the subject of regular review, updated as necessary to take account of attractions, features and points of interest.		
2.5 Product Development	Critically appraise the potential to develop and market a programme of immersive, experiential, life-long learning and educational activities and pursuits. Key themes could include environmental management and stewardship, landscape and habitat management, traditional skills, cultural and sporting activities as well as eco and activity tourism. Care should be taken to consider opportunities for particular demographics such as youth, active-aged, etc.	WCCC, FI, WLP, VW, TDMO, CCG, WSP, NPWS, NTO, DFBA, DREL, DMEC, CCCO, community orgs, landowners, private sector etc	2020-2024
2.6 Product Development	Create a network of serviced Discovery Points at strategic sites and vistas along the Copper Coast touring route. Locations selected should be aligned to the orientation, interpretation and <i>wayfinding strategy</i> and should cluster services and facilities such as car parking, passive recreation, picnic, etc.	WCCC, WLP, NPWS, CCG, TDMO, DFBA, landowners, OPW, NPWS, community orgs, private sector, etc	2022-2024
2.7 Product Development	Extend the Anne Valley Walk northwards to intersect with the trails and wetlands at Mount Congreve House and Gardens at Kilmeaden thereby creating a pivot which links Mount Congreve via a recreational corridor southwards directly to the sea at Annestown via Dunhill and eastwards to Waterford and the WIT Arena.	WCCC, WLP, DFBA, CCG, TDMO, NPWS, NTO, OPW, landowners, community orgs, private sector, etc	2022-2024
3.0 Placemaking	Community groups such as Tidy Towns should refer to the Heritage Council Community-led Village Design Statements in Ireland Toolkit as a valuable guide and resource in the development of each of the village settlements. The toolkit helps to 1) build coherence in the planning, upgrade and development of the settlement; 2) give stakeholders a voice in its planning and presentation for the future; 3) promote the community’s shared vision over the medium to longer term and 4) define the spatial planning and design principles that relate specifically to the settlement 5) ensure that the existing character and distinctiveness is conserved, celebrated and enhanced. Consideration should also be given to other formal assessments such as the WCCC Towns and Villages Health Checks and heritage audits as a basis to shape and deliver wayfinding, heritage presentation and interpretation.	WCCC, FI, WLP, HC, OPW, NPWS, DFBA, CCG, TDMO, TT, landowners, community orgs, private sector, etc	2020-2024

3.1 Placemaking	Local stakeholders should ensure that the distinctive and unique aspects of the area’s built and natural environment, heritage, folklore and traditions are recorded and presented in the appropriate medium, context and location for the benefit of residents and visitors alike. These unique features should be integrated within local, countywide and regional tourism marketing and promotional initiatives.	WCCC, FI, WLP, HC, OPW, NPWS, DFBA, CCG, TDMO, TT, landowners, community orgs, private sector, etc	2020-2024
3.2 Placemaking	Develop a community greening initiative to include high quality site-appropriate landscaping, entrance features, community & sensory gardens and pollination corridors at strategic locations in each of the 7 settlements. The greening initiative should complement enhanced presentation and interpretation of local heritage assets and resources such as buildings, antiquities, artefacts, structures, monuments, folklore, traditions, historical figures and events.	WCCC, WLP, HC, OPW, NPWS, DFBA, CCG, TDMO, TT, landowners, community orgs, private sector, etc	2020-2024
3.3 Placemaking	Increase awareness and appreciation of the local built and natural environmental assets through participation in the Heritage Council initiatives to include the Heritage in Schools , the Adopt A Monument , Irish Pollinator and Tidy Towns Heritage Awards Schemes.	WCCC, FI, WLP, HC, OPW, NPWS, NTO, DFBA, CCG, TDMO, TT, landowners, community orgs, private sector, etc	2020-2024
3.4 Placemaking	A programme of public realm and streetscape enhancements based on the smart village concept to include the management of amenity, community and utility assets through digital technologies. Priorities should include the infrastructure to prioritise modal shift (cycling infrastructure, EV charging points, etc), enhancements to the quality of public space (Wi-Fi, digitally enabled, multi-lingual information and interpretation); energy efficiency in public utilities (LED street lighting, illumination of sites of interest through renewable energies, etc).	WCCC, FI, WLP, HC, OPW, NPWS, NTO, DFBA, CCG, TDMO, TT, landowners, community orgs, private sector, etc	2020-2024
3.5 Placemaking	The 7 settlements in the Copper Coast should engage <u>collectively</u> with the Irish Architecture Foundation (IAF) to seek collaboration through the Reimagine and Architects in School Programme . Supports from which are available on the basis of an annual open call; the former offers free expert professional expertise and guidance in integrated project-based development of the public realm, community amenities, heritage development and repurposing of buildings, the latter provides students with architectural knowledge and understanding through hands-on design workshops and stimulus activities with rich opportunities for cross-curricular learning.	IAF, local schools, WCCC, WLP, HC, OPW, NPWS, NTO, DFBA, CCG, TDMO, TT, landowners, community orgs, private sector, etc	2020-2021

3.6 Placemaking	A programme comprised of social, cultural, heritage and environmental festivals and events should be compiled annually. These activities and events should utilise the network of social and community facilities throughout the settlements to showcase the musical and storytelling skills rooted in local tradition. Particular attention should be paid to linking and integrating these with the programmes of established city and countywide festivals and events.	WCCC, FI, WLP, DFBA, CCG, TDMO, community orgs, private sector, etc	2020-2024
3.7 Placemaking	Involve and engage young people in placemaking by encouraging them to trial new innovative, cost-effective, uses, activities seasonal, one-off or <i>pop-up</i> events in underutilised buildings, amenities or sites through the <i>Lighter, Quicker, Cheaper</i> methodology; an approach which may serve as a catalyst for more formal youth-oriented artistic, cultural, sporting or environmental project development over the medium term.		
4.0 Environmental Management	Establish environmental objectives for a <i>smart village</i> strategy to include public realm, energy and utility management, public lighting, mobility, amenity management and metering/monitoring of environmental assets and resources.	WCCC, WLP, HC, OPW, NPWS, SEAI, NTO, DFBA, CCG, TDMO, TT, landowners, community orgs, private sector, etc	2020-2024
4.1 Environmental Management	Devise a climate adaptation strategy for the energy retrofit of protected heritage, traditional or vernacular buildings. To complement this, mitigation works to address the degrading impacts of climate change on the industrial architecture should be assessed and completed	WCCC, WLP, HC, OPW, NPWS, SEAI, DFBA, CCG, TDMO, DMEC, TT, landowners, community orgs, private sector, etc	2020-2024
4.2 Environmental Management	Identify site-specific initiatives and co-ordinate community-led initiatives in biodiversity and conservation for the restoration and rewilding of critical habitats including wetlands, rivers and lakes, native woodlands, dune systems and hedgerows. Where appropriate and permissible and of strategic importance to support the agreed tourism strategy, the access, presentation and interpretation of local antiquities, monuments and heritage sites should be enhanced.	WCCC, WLP, HC, OPW, NPWS, NTO, DFBA, CCG, TDMO, TT, DMEC, landowners, community orgs, private sector, etc	2020-2024
4.3 Environmental Management	Plan and co-ordinate a tailored programme of mentor and training supports to assist volunteers implement best practice in conservation, heritage management, biodiversity and climate adaptation and mitigation.	WCCC, WLP, HC, DFBA, CCG, TDMO, DMEC, TT, community orgs, private sector, etc	2020-2024

4.4 Environmental Management	Co-ordinate a <i>Citizen Science</i> biodiversity programme to encompass local capacity building, training and technical support to develop local awareness, responsibility, and action plans to combat threats to biodiversity from invasive species, habitat loss and pollution and to maximise the contribution of nature in supporting the quality of life for all.	WCCC, WLP, HC, OPW, NPWS, WIT, IPCC, DFBA, CCG, TDMO, TT, DMEC, landowners, community orgs, private sector, etc	2020-2024
4.5 Environmental Management	Promote water conservation and drought mitigation measures through rainwater harvesting and the development of rain gardens comprised of native shrubs, perennials and flowers planted in a manner designed to temporarily hold and soak in rainwater runoff from roofs, driveways or lawns.	WCCC, IW, WLP, OPW, NPWS, NTO, DFBA, CCG, TDMO, TT, landowners, community orgs, private sector, etc	2020-2024
4.6 Environmental Management	Use <i>Climate Positive Design</i> (principles, pathfinder and toolkit resources) in the design of publically funded social and community facilities and amenities; the objective being to ensure that, over the short to medium term, new developments and upgrades sequester more carbon than is emitted and that carbon neutrality or positivity is achieved.	WCCC, FI, WLP, HC, OPW, NPWS, SEAI, NTO, DFBA, CCG, TDMO, DREL, landowners, TT, community orgs, private sector, etc	2020-2024
4.7 Environmental Management	Integrate environmental and sustainability principles and practices with the <i>Destination Management Strategy</i> through the adoption of and adherence to the <i>Global Sustainable Tourism Council Criteria and Performance Indicators</i> ; the global baseline standard for sustainable travel and tourism.	WCCC, FI, WLP, GSTC HC, OPW, NPWS, NTO, DFBA, CCG, TDMO, landowners, community orgs, private sector, etc GSTC	2020-2024
4.0 Marketing & Promotion	The branded identity (visual identity, copy and taglines) developed by the Copper Coast Geopark should become the standard under which the overall Copper Coast tourism offer is communicated and promoted to tourists. Care should be taken to protect the branded identity (by copyright protection and third party licensing agreement) in order to ensure consistency, integrity and accuracy in its application and use.	WCCC, FI, WLP, VW OPW, NPWS, NTO, DFBA, CCG, TDMO, landowners, community orgs, private sector, etc	2020-2024
4.1 Marketing & Promotion	Tourism and other stakeholders must ensure that a Copper Coast tourism proposition is defined and aligned to the countywide WCCC Tourism Marketing and Promotion Plan for 2020 and thereafter.	WCCC, FI, VW, WLP, TDMO, community orgs, private sector	2020-2024
4.2 Marketing & Promotion	Local Stakeholders should ensure that a coherent, collective Copper Coast Tourism branded offer (<i>accommodation, activity, attractions, antiquities, services, festivals, events, heritage, environment, etc</i>), aligned with the Ireland's Ancient East brand. Marketing and promotional material, guides and information are produced to a standard to allow circulation through the <i>Fáilte Ireland</i> Tourism	WCCC, FI, VW, WLP, TDMO, DFBA, CCG, community orgs, private sector	2020-2024

	Information Centre/Point network throughout Counties Waterford, Cork, Dublin, Kilkenny and Wexford.		
4.3 Marketing & Promotion	Use Fáilte Ireland's <i>Ancient East Toolkit for Storytelling Interpretation</i> to refine and develop narratives aligned to and supportive of the signature brand proposition with particular emphasis on developing local themes and narratives for the <i>Maritime Gateway VEDP</i> . This should be the basis for the development of itineraries that showcase the principal attractions and signature experiences in the area and use same for <i>familiarisation visits</i> by domestic and overseas media	WCCC, FI, VW, WLP, TDMO, DFBA, CCG, community orgs, private sector	2020-2024
4.4 Marketing & Promotion	Stakeholder interests to agree yearly in advance a programme of festivals, cultural, tourism, events and promotional initiatives detailed on the <i>Fáilte Ireland Trade Portal</i> scheduled at strategic intervals throughout the year in order to stimulate visitor/tourist/holidaymaker interest and spend.	WCCC, FI, VW, WLP, TDMO, DFBA, CCG, DREL, community orgs, private sector	2020-2024
4.5 Marketing & Promotion	Local stakeholders should critically review content related to the Copper Coast tourism information (accommodation, attractions, facilities, events), images and copy on international, national, regional and local tourist and promotional websites to include www.discoverireland.ie , www.visitwaterford.ie , www.ireland.com , www.irelandsancienteast.com , www.irishtrails.ie and https://munstervales.com . Content should be amended, edited and updated as appropriate. High quality photography, imagery and video that showcases the prime local attractions, facilities, themes or events is uploaded to the Tourism Ireland/Fáilte Ireland www.irelandscontentpool.com website to aid overseas promotions.	WCCC, FI, VW, WLP, TDMO, DFBA, CCG, community orgs, private sector	2020-2024
4.6 Marketing & Promotion	Devise a specific marketing and promotional initiative targeting the outdoor recreation and amenity needs of residents in <i>Cork</i> and <i>Waterford</i> cities. At a minimum this should ensure that all suitable walking, cycling trails, sli na slainte, parks and recreational areas are listed on www.irishtrails.ie . Care should be taken to ensure that the characteristics, technical specifications, and practical access information for each is correct and updated as necessary.	WCCC, FI, VW, WLP, TDMO, DFBA, CCG, CCCO, WSP, landowners, community orgs, private sector	2020-2024
4.7 Marketing & Promotion	Stakeholder interests to participate in the Fáilte Ireland <i>Local Experts Programme</i> . This will help to embed local knowledge and information and facilitate its sharing with visitors to the Copper Coast.	WCCC, FI, VW, WLP, TDMO, DFBA, CCG, TT, community orgs, private sector	2020-2024

8. Resources & Funding

Care has been taken to ensure that the objectives and development actions in this study accord with the priorities, objectives, resources and support funding currently or likely to be available over the period of its implementation. It is not intended that these actions replicate, dilute or undermine strategically important national or regional initiatives. Accordingly, it is incumbent on local interests to develop partnerships and collaborations aligned to existing or planned initiatives for which resources have already been earmarked. Stakeholders drawn from the public, private and community sectors that collaborate as individual legal entities to implement a shared strategy with aligned individual projects represents the best possible means to maximise public funds and obviate *de minimis* constraints. EU regulation (EU) No. 1407/2013) limits the provision of many public funds to a maximum of €200,000, irrespective of the source, given to a project applicant over a given 3 year period.

Actions to support the social, economic and environmental development of the Copper Coast will most likely require resources and funding from a range and combination of public and private sources. These are likely to include development support comprised of guidance, training and networking development as well as financing from the EU, national and local government as well as from state agencies. Added to this, equity funds and financing leveraged from the private sector through investment; tax incentives and reliefs; local fundraising; donations and philanthropy could also be expected. It should also be noted that there is a competitive element to the granting of public funds as well as an onerous requirement on applicants and beneficiaries to demonstrate institutional and organisational capability, strong governance and compliance, partnership and vision and value for money in project implementation. There should be a clear focus on the attainment of defined outcomes and impacts supportive of and aligned to EU, national and regional development strategies.

Development initiatives seeking pre-development, operational, network or capital funding might consider policy measures and enabling resources provided from the following National and EU sources:

7.1 National Funding Schemes and Supports

Of particular importance are the objectives, priorities and enabling resources set out in ***The Ireland 2040 Plan***. This incorporates the ***National Planning Framework*** (NPF), the objective of which is to stimulate renewal and investment throughout the country. The plan details a range of objectives and development priorities including compact growth, enhanced regional accessibility, sustainable mobility, access to quality childcare, education and healthcare services, strengthened rural economies and communities and transition to a low carbon and climate resilient society. Implementation of the plan is costed at €115bn with each strategic outcome having a dedicated budget line. Amongst these, a [Rural Regeneration and Development Fund](#) (RRDF) will be of particular relevance with a €1Bn stimulus

tailored to facilitate growth and development in the rural economy. Initial funding of €315m is being allocated over the period 2019 to 2022.

Figure 19: National Planning Framework, National Strategic Outcomes and Priorities



Source: Ireland 2040 National Development Plan

The RRDF provides an opportunity to support integrated, ambitious and strategic multi-annual projects involving a range of Departments, State agencies, and other partners. Proposals for funding are made through a competitive bid approach, based on delivering the objectives in the NPF. Project proposals must demonstrate **1)** a relevance to the national strategic outcomes set out in the NPF; **2)** a sustainable impact on the social or economic development of rural communities through measureable outputs; **3)** collaboration between Departments, State agencies, Local Authorities, the private and/or community sectors and other bodies; **4)** an integrated strategic approach to rural development linked to the NPF strategic outcomes and consistent with the *County Development Plan*, the *Local Economic and Community Plan* and the *Regional Spatial and Economic Strategy*; **5)** additionality and value for money and the leveraging of funding from local authorities, exchequer/state sector, as well as from the community or private sector where appropriate, to enable investment to proceed that might not otherwise occur.

Applicants are limited to organisations such as local authorities, and other locally/regionally based organisations, local development companies, chambers of commerce, etc., as well as government departments and state agencies. For the purpose of accountability and oversight, the lead partner of all projects must be a state funded body; however, collaboration with the private sector is actively encouraged. Applications submitted by each lead partner cannot exceed 3 per call. Proposals may be made in respect of settlements of 10,000 or less and their outlying areas. In general, the fund will provide up to 75% of the total project value, with at least 25% of funding to be provided from other sources. A maximum of 80% funding will be considered where community contributions form a significant element of the match-funding. [Proposals](#) submitted for funding will have to demonstrate a stakeholder contribution in the form of a combination of wider exchequer and/or State sector investment, Local Authority investment and/or land, community investment, private sector investment or other asset contributions. Projects can be submitted under *Category 1* which seeks to support shovel-ready projects of scale, requiring in excess of €500,000 in development funding. However, particular attention might be paid to *Category 2* type projects for which pre-development funding and resources for project planning, organisational and competency development can be obtained; the objective of which is to progress to the scale and type of project development anticipated in *Category 1*. A second public call for *Category 2* proposals is expected to be made in October 2019, with subsequent calls planned for 2020 and thereafter.

The Ireland 2040 Plan also includes a €500 million ***Disruptive Technologies Innovation Fund*** (DTF), which seeks to build scale and impact through multi-annual industry collaborations between partner consortia. Priority development themes include from information and communication technologies; health and wellbeing; food; energy, climate action and sustainability; manufacturing and materials; business services and processes. Within each of these six themes specific priority areas such as robotics, artificial intelligence, augmented and virtual reality, advanced and smart manufacturing; smart and sustainable food production and processing have been identified. The minimum expected

project grant investment is €1m. Funding will be made on the basis of an open call on annual basis. Funding confirmed from the *Department of Public Expenditure and Reform* (DPER) for the fund totals €180m in the period to 2022; being €20m (2019); €30m (2020); €40m (2021) and €90m (2022).

The €500 million ***Climate Action Fund*** (CAF) operates over the ten-year timeframe from 2018 to 2027. The fund is a key element of the Government's strategy to reduce greenhouse gas emissions, increase renewable energy and enhance energy efficiency, as set out in the *National Mitigation Plan*. Its core objective is to support initiatives that contribute to the achievement of Ireland's climate and energy targets including projects that reduce emissions or increase renewable energy use in public transport; increase the uptake of electric vehicles and the improve the development of e-charging infrastructure; develop district heating schemes; adapt public lighting to energy efficient sources and reduce HGV fuel consumption and emissions through the use of telematics. The scope and scale of projects supported by the various funding calls may vary to ensure the full objectives of the CAF are realised. This may give rise to funding calls focusing on specific sectors such as electricity, transport, heat or agriculture or specific disciplines and themes such as capacity building, innovation or community participation.

Other possible funding sources for environmental actions include [*the Department of Communications, Climate Action and Environment*](#) which provides funding for environmental initiatives and climate mitigation measures and the [*Local Agenda 21 Environmental Partnership Fund*](#) which promotes sustainable development by assisting small-scale environmental projects at local level.

FI offers a range of funding supports to the public, private and voluntary sectors to assist tourism development and promotion. Funds will be available from FI to develop products and experiences linked to IAE particularly in support of the development of existing as well as new Visitor Experience Development Plans. Funding comprises a capital fund, storytelling and interpretation supports, marketing, networking and training, festival funds as well as general business supports to industry incumbents. Larger scale tourism projects can be supported through a €150m capital investment programme [*Platforms for Growth*](#) which will run to 2022. Its primary objective is to create major new visitor attractions of scale, either through enhancement or development with priority given to *“Immersive Heritage and Cultural Attractions that appeal to overseas visitors looking for experiences that help them to ‘connect’ with Ireland and bring the country’s culture, heritage and people to life”*. Capital costs for individual projects are expected to be in excess of €2.5m with a matched funding requirement.

The Sustainable Energy Authority of Ireland (SEAI) offers a range of grants and incentives including the [*Better Energy Communities*](#) scheme which supports the retrofit of community buildings and resources to enhance energy use and efficiency. This includes demonstration projects, building fabric upgrades, integration of control systems and renewable energy resources. Innovative partnerships between sectors, as well as collaborations between the public and private sector, commercial, not for profit sectors, financing entities and energy suppliers are encouraged as are initiatives that engage with other

SEAI programmes. Applications for the 2020 scheme will open in November 2019. A range of supports and incentives are also available to assist individual private commercial businesses reduce energy costs and/or achieve greater efficiency in energy use.

SEAI also provides financial support to local authorities to install public [charging points](#) for electric vehicles. It is expected that this will facilitate the installation of an additional 1,000 on-street public charge points in the period to 2024. These will comprise charging posts (AC power at 230v via two plug sockets each supplying 22kw of power) and lamp post chargers (AC power at 230v via one plug socket each supplying 3-7kw of power). Installation may be integrated with street lighting or other public utilities. Locations favoured may include public parking on-street or in local authority car parks. The grant rate is 75% and is capped at €10,000 depending on specification.

The **Heritage Council** collaborates constructively with national and local government, voluntary, educational and other organisations in support of its primary objective to deliver evidence-based policy advice in areas such as vernacular architecture, measuring the social and economic value of heritage, as well as policies on landscape, biodiversity, regeneration and revitalisation. It operates a number of programmes with advisory and grant support measures, most notably the *National Public Realm Plan Programme*; the *Town Centre Health Check initiative*; *Community-led Village Design Statements*; *The Tidy Towns Heritage Award*; *The Historic Towns Initiative*; *Adopt a Monument*; *The Museum Standards Programme for Ireland*; *Heritage in Schools Scheme*; *GLAS traditional Farm Buildings Scheme*; *Irish National Strategic Archaeological Research Programme*; *Bibliomara* and the *Coastal Heritage Library*. It is expected that a revised programme of guidance and financial supports, in line with its new [strategic plan](#), will be available in 2020.

7.2 Tax Reliefs and Incentives

The **Revenue Commissioners** offer a range of incentive schemes to support tourism development and heritage development. These include the [Employment and Investment Incentive Scheme](#) (EII), a tax incentive which provides for tax relief of up to 40% in respect of investments made in certain corporate trades including tourism traffic undertakings. This includes tourist accommodation; interpretative centres; tourist and ancillary activities. The scheme allows an individual investor to obtain income tax relief on investments for shares in certain companies up to a maximum of €150,000 per annum in each tax year up to 2020. Initially, relief is allowed on thirty fortieths [30/40] of the EII investment in the year the investment is made. Potentially, this can result in a tax saving for the investor of up to 30% of the investment.

[Section 482](#) offers tax relief for owner occupiers of an approved building or an approved garden for expenditure incurred for their repair, maintenance or restoration. The owner-occupier must then allow reasonable access to the public or use it as a tourist accommodation facility. The [Charitable Donation](#)

[Scheme](#) allows qualifying bodies with charitable status to benefit from individual or corporate donor funds in a tax efficient manner.

7.3 Countywide Development Supports

WCCC offers funding from a variety of exchequer sources including **Town and Village Renewal Programme, Local Enterprise Office, Outdoor Infrastructure Investment Scheme, [INTERREG](#) and Rural Recreation Funding**. Development funding is also available for networking, artistic and cultural pursuits, festivals and events. The **CLÁR** programme funded by the *Department of Rural and Community Development* and delivered, for the most part, by local authorities provides funding for small scale capital projects in rural areas that have experienced significant levels of depopulation. As with Town and Village Renewal Programme, priorities, themes and the level of financial support available can vary year on year. Particular attention should be paid to the resourcing by WCCC for its countywide tourism strategy over the medium term; a fund estimated to be €600,000.

The [Historic Structures Fund](#) (HSF) provides limited amounts of funding to local authorities to address the deterioration of Ireland's architectural heritage and specifically aims to safeguard protected structures under the *Planning and Development Act 2000*. Private and publicly owned buildings can be considered for capital support, the primary focus of which is the care and restoration of historic structures and buildings for the benefit of communities and the general public. The fund has two streams with **1)** grants from €15,000 up to €50,000 aimed at essential repairs and smaller capital works for the refurbishment and conservation of heritage structures. and **2)** a small number of grants from €50,000 up to €200,000 for larger enhancement, refurbishment or reuse projects involving heritage structures, where a clear community or public benefit has been demonstrated. The [Built Heritage Investment Scheme](#), also managed locally by WCCC, offers grant support of up to €15,000 to retain, refurbish or restore the integrity and authenticity of important heritage buildings and vernacular architecture.

The LCDC in partnership with **WLP** offers development support and funding from the *LEADER* programme, funds from which can be used to support a wide range of social, economic and environmental projects as well as for organisational, development or capital development for community and private commercial projects. Funds are awarded on a competitive basis and include specific calls for inter-territorial, transnational cooperation and food sector development measures. Community-led projects can under certain circumstances maximise the available public funds by using the donation of assets and use of voluntary labour as part of the matched fund requirement.

The **Fisheries Local Action Group (FLAG) South West**, a coastal development scheme administered by Bord Iascaigh Mhara (BIM) offers financial support from the European Maritime and Fisheries Fund (EMFF). Operating over the period 2016-2023, the scheme provides financial and technical support for fisheries diversification; economic and community development opportunities; value-added fishery and

aquaculture products; creating/maintaining jobs in coastal areas; promoting innovation in fisheries and aquaculture; lifelong learning and training; promoting social well-being and cultural heritage in fisheries and aquaculture areas; promoting best environmental practices and strengthening the role and governance of fisheries communities in local development. The [scheme](#) is currently closed for 2019 applications but will reopen for an open call in 2020.

7.4 Philanthropy and Corporate Social Responsibility

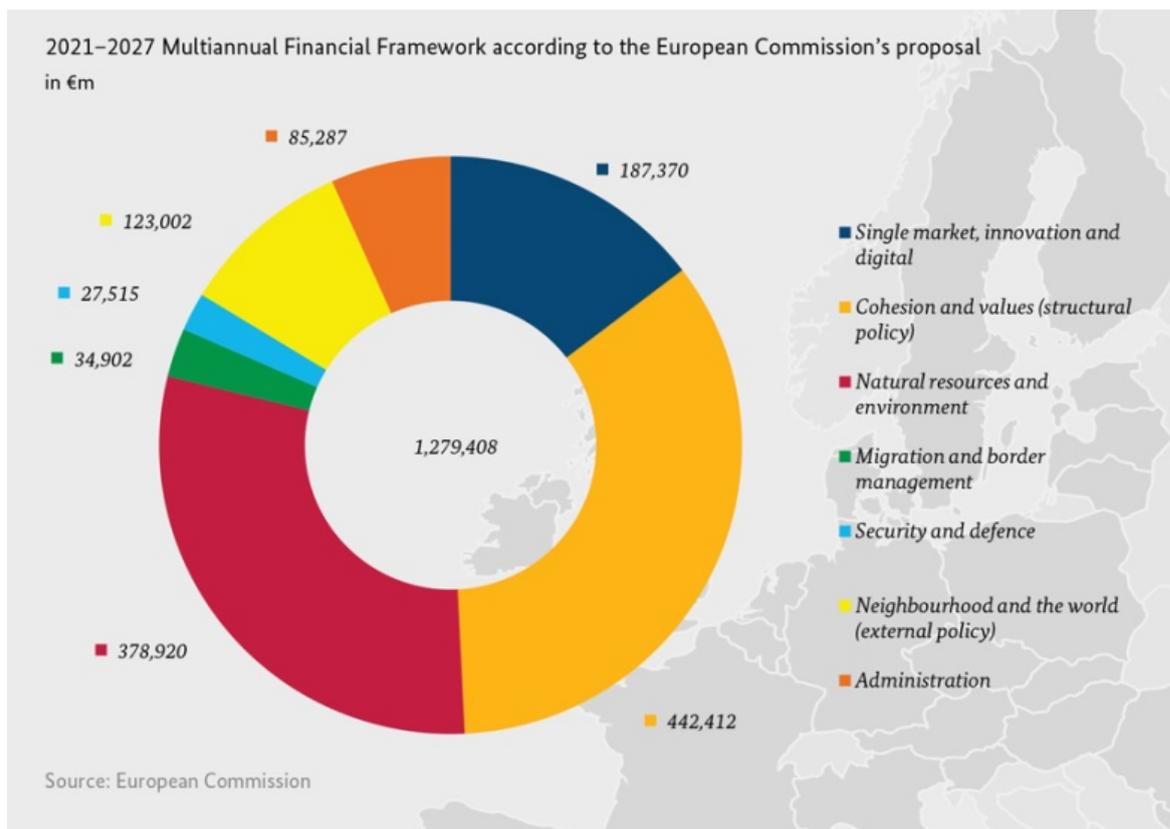
Philanthropic funds are available on a selected basis through the [Social Innovation Fund Ireland](#), [Community Foundation of Ireland](#), [The Ireland Funds](#) and [Coca Cola Ireland](#). Corporate and Social Responsibility (CSR) funds or technical expertise might be accessed from multi-nationals or other corporate businesses with links or diaspora connections to the Copper Coast and its communities. Consideration might also be given to sourcing matched funds where needed from [Community Finance Ireland](#) and [Clann Credo](#) both established providers of social finance and which lend bridging, operational and capital funds to social enterprise and community and voluntary initiatives throughout the country. [Linked Finance](#) and [Grid Finance](#) are enterprise-oriented peer-to-peer lending platforms active across all sectors. They provide an alternative means of raising capital and operational funds for small businesses.



7.5 EU Funding Schemes and Supports

The current round of **EU funding** expires in 2020. Its successor budget, provisionally costed at €1.23tn for the period 2021-2027, will have a discernible shift in emphasis with priorities to include development and financial supports for climate action and mitigation; sustainability initiatives; social enterprise and innovation; technology; open science and climate friendly farming, amongst others. Supports for carbon reduction, climate action and mitigation strategies; sustainable mobility; migration; inclusivity; technology; open science and innovation are likely to benefit from additional resources while the *Common Agriculture Policy* (CAP) and *Cohesion Policy* – funds from which Ireland has benefited strongly – will be aligned strongly to these priorities and may potentially to see budgets cut from current levels. It should be noted that under the new 2021-2017 EU budget arrangements Ireland – currently a net contributor of funds – will likely be required to double its contribution to the EU budget over the medium term.

Figure 20: Proposed EU Multi-Annual Financial Framework 2021-2027



Source: European Commission.

Programme arrangements and supporting budgets for the 2021-2027 period, will be finalised in early 2020 and will strongly influence development priorities and funding supports at member state level. The headline programmes and support measure are expected to be:

1. **Horizon Europe** – a successor programme to Horizon 2020 – which will support EU policy priorities in areas such as the achievement of the *UN Sustainable Development Goals*, health, food and natural resources, resilience and security, climate, energy and mobility and other societal challenges in order to secure a low-carbon, circular and climate-resilient society and industrial competitiveness.
2. **Invest EU Fund** will target investments promoting sustainable infrastructure, research and innovation, digital transformation, the access to finance for small and medium-sized enterprises, education, skills, social infrastructure.
3. The **Connecting Europe Facility** will emphasise EU transition towards connected, sustainable, inclusive, safe and secure mobility and will contribute to the decarbonisation of transport, for example by constituting a European network of charging infrastructure and for alternative fuels or prioritisation of environmentally friendly transport modes. Smart and digitised energy grids and high capacity digital networks will also be supported.
4. The **Digital Europe Programme** will support ambitious projects that will make the best use of digital capacities and of the latest digital technologies in areas of public interest. It will seek to address societal challenges and bring the benefits of digital transformation to every citizen and business.
5. The **European Regional Development Fund** and **Cohesion Fund** will support research and innovation; climate change and environment; support to small businesses; services of general economic interest; telecommunications, energy and transport infrastructure; health, education, culture and social infrastructure; sustainable urban development and smart villages. It will focus on five objectives: **A smarter Europe** to promote competitiveness, digital transformation, entrepreneurship and innovation (including inclusive growth and social enterprises), enhancing the business environment as a part of industrial adaptation to the challenges of globalisation, circular economy and climate change. **A greener carbon-free Europe** to support clean and fair energy transition; to enhance energy efficiency; to support transition to a low-carbon economy; to stimulate renewable energy; to support innovative use of low-carbon technologies; to support *green* and *blue* economy investment including sustainable natural resource management, circular economy, climate adaptation and mitigation. **A more connected Europe to enhance** mobility, energy and regional ICT connectivity to develop regional networks and systems to promote sustainable transport; smart energy grids and high-speed digital access in order to enhance

regional, local and cross-border connectivity. **A more social Europe** to implement the principles of the *European Pillar of Social Rights*, in particular life-long learning, education and training infrastructure as well as health, culture and social infrastructure. **A Europe closer to citizens** to support sustainable and integrated development through local initiatives to foster growth and socio-economic local development of urban, rural and coastal areas.

6. The **European Social Fund+** will support the implementation of the principles of the *European Pillar of Social Rights* and will seek to address the current fragmentation of funding instruments in the social policy area.
7. The **LIFE Programme** will support the transition towards a circular, resource and energy-efficient, low-carbon and climate-resilient economy.

The EU provides a wide range of supports and funds available to museums, archives, heritage and other cultural attractions, most notably under the *Creative Europe: Culture; Creative Europe: Media; Erasmus Plus; Europe for Citizens* and *Horizon 2020 (social sciences and humanities strands)*. It is estimated that museums receive an estimated €10.6m³² per year out of the centralised EU funding programmes. In the programming period 2014-2018, a total of 663 projects which included museums as partners have been funded across all 4 programmes. Details on the funds, financing and beneficiaries can be found in the [EU Funding for Museums, Galleries and Archives in Europe](#) report published by the Network of European Museum Organisations (NEMO) in September 2019.

The EU promotes free Wi-Fi connectivity in public spaces such as parks, squares, civic spaces, libraries, public buildings, health centres and museums through the [WiFi4EU](#) scheme. Applications are made by public call on a *first come, first served* basis. In Ireland, applicants are limited to local authorities and proposals are submitted for individual municipalities. A voucher to a maximum value of €15,000 allows covers the equipment and installation cost of a Wi-Fi hotspot (wireless access points). Operational and maintenance costs are covered by the municipality.

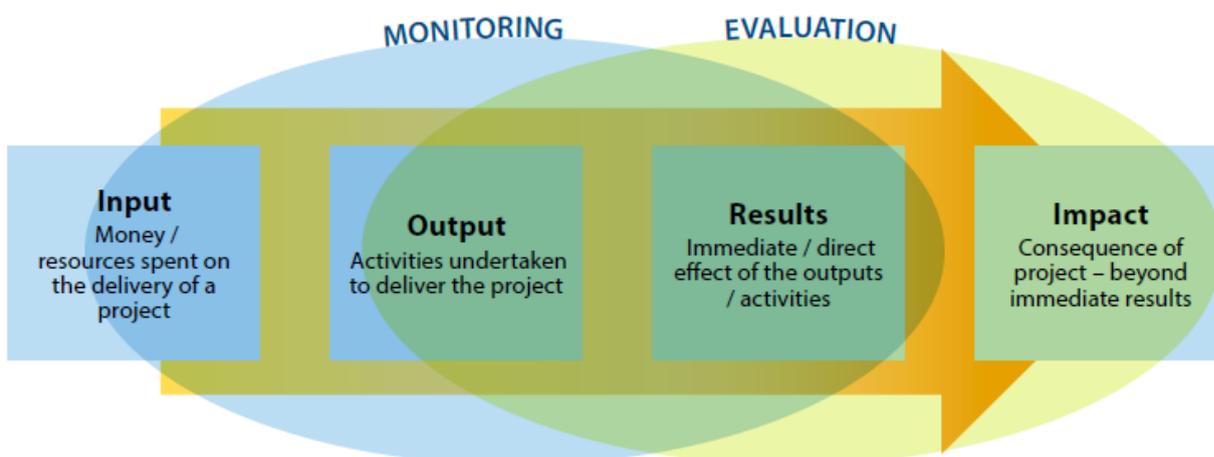
Information and notifications of EU funding opportunities and of collaboration initiatives can be accessed by signing up to the EU [Single Electronic Data Interchange Area](#) (SEDIA). [Welcome Europe](#) also offers an extensive database of EU funding opportunities as well as a range of consultancy and project management services. Funding alerts are available on a subscription basis.

³² NEMO Report: European museums' participation in EU funding programmes, 2019

8. Monitoring and Evaluation

Monitoring and evaluation should be regarded as an essential part of the planning and implementation of the CCOS over the period 2020-2024. Monitoring focuses on quantitative data (numbers, events, participants, projects, etc.) and reflects *inputs and outputs*, generally on a project by project basis. Its function is to ensure that individual activities are kept on course and that discernible progress is made. By contrast, evaluation is a periodic assessment of the design, implementation and outcomes of the strategy itself. As it is scheduled at agreed periodic milestones, evaluation focuses on *results & impacts*; its primary purpose being to help decision-making; ascertain achievement or value; gain insight; enable reflection; and identify future possibilities.

Figure 21: Monitoring & Evaluation Logic Model



The review process of which monitoring and evaluation are key elements should be considered as a periodic, participative, retrospective assessment of the plan and its' supporting development actions' outcomes and impacts. Qualitative and quantitative data will help build an evidence base of sound stewardship and governance, guide advocacy representation as well as build legitimacy amongst local organisations, stakeholders, development agencies and funders. Furthermore, it provides measures by which the success or otherwise of the CCOS can be objectively assessed and judged. Care should also be taken to advise local and agency stakeholders of monitoring and evaluation outcomes through a formal communications strategy; a process assisted by *visualisation* and *story-telling techniques*. Similarly, positive outcomes from monitoring and evaluation can help shape regional, countywide and local tourism promotions. The questions used for monitoring and evaluation purposes should be in line with the intervention logic for the CCOS and link the plan's objectives to an agreed set of *Key Performance Indicators* (KPIs). For the purposes of this plan these might include:

Table 15: Suggested Key Performance Indicators

1. Advocacy and Representation

Metric	Output
Development of local Destination Management Organisation	
Number of local organisations aligned to strategy	
Number of development agencies aligned to strategy	
Number of representative bodies, committees, networks or fora represented in	
Number of regional and countywide development strategies represented in and aligned with.	
Number of organisations leading development actions	
Number of organisations supporting development actions	
Number of formal inter-community collaborations	
Increase in number of volunteers	
Number of youth oriented initiatives	
Number of project development actions submitted for funding	
Number of project development actions approved for funding	
Value of public funding approved for project development	
Value of public funding leveraged indirectly from development agencies	
Number of funded projects completed	

2. Product Development

Metric	Output
Additional tourism accommodation developed	
Number of new fee-charging tourism attractions developed	
Number of new free tourism attractions developed	

Number of new tourism facilities and amenities developed	
Number of new experiences developed	
Number of new businesses developed directly	
Number of new businesses developed indirectly	
Number of outdoor active or recreational facilities developed	
Number of trails enhanced or developed	
Number of trailhead facilities developed	
Number of free Wi-Fi enabled public or community facilities Number of vacant buildings or sites re-used/re-purposed for social activity	
Number of vacant buildings or sites re-used/re-purposed for enterprise activity	
New locations physically connected to Copper Coast wayfinding strategy internal	
New locations physically connected to Copper Coast wayfinding strategy external	

3. Placemaking

Metric	Output
Number of WCCC supported public realm initiatives	
Number of Heritage Council supported initiatives	
Number of locations enhanced under wayfinding strategy	
Number of new tourism oriented festivals and events	
Number of third party health checks, audits and assessments	
Number of new amenities and facilities for soft transit modes	
Number of accessible, inclusive shared space locations	
Number of cultural, heritage and folklore initiatives	
Number of park and active space initiatives	
Number of festival & event greening initiatives	

Number of heritage sites & antiquities integrated within storytelling and interpretation initiatives	
Number of new heritage sites & antiquities accessible to public	
Number of tidy towns participants	
Number of entrance features developed or enhanced	
Number of civic sites or streetscapes utilising smart technologies	
Number of public sites utilising renewable energy sources	

4. Environmental Management

Metric	Output
Number of natura 2000 designated sites enhanced	
Number of non-natura 2000 designated sites enhanced	
Number of biodiversity initiatives undertaken	
Number of landscaping/pollination initiatives	
Number of water quality improvement or conservation initiatives	
Number of public buildings or heritage properties retrofitted	
Number of heritage building conservation initiatives	
Number of natural amenities or sites utilising smart technologies	
Number of natural amenities or sites utilising renewable energy sources	
Number of SEAI Better/Sustainable Energy initiatives	
Number of actions to support the UN Sustainable Development Goals	
Number of carbon reduction initiatives undertaken	
Number of new <i>Citizen Science</i> and/or educational initiatives developed	

5. Marketing & Promotion

Metric	Output
Number of products, attractions, sites, etc, represented in IAE initiatives and promotions.	
Number of products, attractions, sites, etc, represented in countywide initiatives and promotions.	
Number of participants in VEDP	
Number of marketing networks engaged with	
Number of collective marketing & promotional initiatives undertaken	
Number of individual marketing & promotional initiatives undertaken	
Number of new affiliates to the Copper Coast Geopark brand	
Number of area-based online promotions undertaken	
Number of local participants in the <i>Local Experts</i> programme	
Number of new affiliations developed	
Estimated increase in <i>visitors, tourists and holidaymakers</i>	

Appendix 1: Strategic Integration

The Opportunity Study, objectives, strategy and actions is aligned to and coordinated with relevant local, regional, national or international strategies and policies, identified stakeholders and potential funders. These include but are not limited to:

- Europe 2020: A Strategy for Smart, Sustainable and Inclusive Growth (and associated development and funding programmes).
- European Commission: EU Action for Smart Villages.
- United Nations: Transforming our World: the 2030 Agenda for Sustainable Development.
- National Planning Framework: Project Ireland 2040.
- Department of Public Expenditure & Reform: Building on Recovery: Infrastructure and Capital Investment 2016-2021.
- Department of Transport, Tourism & Sport: Investing in our Transport Future.
- Department of Transport, Tourism & Sport: Smarter Travel – A Sustainable Transport Future.
- Transport Infrastructure Ireland; Statement of Strategy 2016- 2021.
- Department of Housing, Planning, Community and Local Government; Rebuilding Ireland.
- Enterprise 2025 Ireland’s National Enterprise Policy 2015-2025.
- Department of Business, Enterprise and Innovation: Action Plan for Jobs; Southern region 2015-2017 et al.
- Department of Communications, Climate Action & Environment; National Mitigation Plan & National Adaptation Framework
- Department of Communications, Climate Action & Environment: National Digital Strategy
- Department of Education and Skills: National Skills Strategy 2025 – Ireland’s Future
- Department of Arts, Heritage, Regional, Rural and Gaeltacht Affairs; Culture 2025
- Department of Arts, Heritage and the Gaeltacht, National Landscape Strategy 2015-2025
- Department of Culture, Heritage and the Gaeltacht; Heritage Ireland 2030
- Department of Communications, Climate Action and Environment, National Energy and Climate Plan 2021-2030
- Department of Communications, Climate Action and Environment, Climate Action Charter for Local Authorities
- National Transport Authority: Statement of Strategy 2018-2022
- Realising Our Rural Potential: Action Plan for Rural Ireland.
- Commission for the Economic Development of Rural Areas: Energising Ireland’s Rural Economy.
- Retail Consultation Forum: A Framework for Town Centre Renewal.
- Department of Arts, Heritage and the Gaeltacht, National Landscape Strategy 2015-2025
- National Biodiversity Plan 2017-2021.
- Fáilte Ireland: Tourism Development & Innovation: A Strategy for Investment 2016- 2022
- Fáilte Ireland: Ireland’s Ancient East Path to Growth
- Fáilte Ireland: National Visitor Experience Development Framework
- National Inventory of Architectural Heritage.
- Heritage Council: Heritage at the Heart Strategic Plan 2018-2022
- Heritage Council: National Pilot Town Centre Health Check (TCHC) Training Programme.
- Heritage Council: Community-led Village Design Statements in Ireland Toolkit
- Society Chartered Surveyors Ireland Rejuvenating Ireland’s Small Town Centres.

- National Biodiversity Data Centre: All-Ireland Pollinator Plan 2015-2020.
- South East Regional Authority: Regional Planning Guidelines for the South East Region 2010-2022.
- Southern Regional Assembly: Draft Regional Spatial Economic Strategy for the Southern Region
- Waterford City Development Plan 2013-2019.
- Waterford County Development Plan 2011-2017.
- One Waterford: Local Economic and Community Plan 2015-2020.
- People and Place, Waterford Heritage Plan 2017-2033
- Waterford Biodiversity Plan 2008-2013
- County Waterford Local and Community Development Committee LEADER Local Development Strategy 2014-2020.
- Waterford City & County Council; Walking Potential of the Copper Coast County Waterford 2019.
- Waterford City & County Council; INTERREG Europe Local Flavours 2019.
- Waterford LEADER Partnership; A Regeneration Study for the Copper Coast Region of County Waterford 2013.
- Renewable Energy Strategy for Waterford City and County 2016-2030
- Irish Museums Association Strategic Plan 2018-2021
- Waterford Sports Partnership Strategic Plan 2018-2022.
- Dungarvan Town Development Plan 2012-2018

Appendix 2: Online Survey

 **Copper Coast Tourism Action Plan** EDIT

⊕ PAGE TITLE

1. What is your *principal* role in tourism development and marketing in the Copper Coast?

- | | |
|---|--|
| <input type="checkbox"/> Visitor accommodation | <input type="checkbox"/> Development agency |
| <input type="checkbox"/> Fee-paying visitor attraction | <input type="checkbox"/> Trade or Representative Body |
| <input type="checkbox"/> Free visitor attraction | <input type="checkbox"/> General interest community and voluntary organisation |
| <input type="checkbox"/> Fee-paying amenity or facility | <input type="checkbox"/> Special interest community and voluntary organisation |
| <input type="checkbox"/> Free amenity or facility | <input type="checkbox"/> Interested individual |
| <input type="checkbox"/> Other (please specify) | |

2. What are the most important tourism assets in the Copper Coast?

3. What represents *untapped tourism* potential in the Copper Coast? (tick as appropriate)

- | | |
|---|--|
| <input type="checkbox"/> Culture, heritage & folklore | <input type="checkbox"/> Fee paying visitor attractions |
| <input type="checkbox"/> Attractive towns and villages | <input type="checkbox"/> Family and child-friendly orientation |
| <input type="checkbox"/> Landscape & the natural environment | <input type="checkbox"/> Health & wellbeing |
| <input type="checkbox"/> Beaches | <input type="checkbox"/> Sightseeing |
| <input type="checkbox"/> Outdoor recreation, walking & trails | <input type="checkbox"/> Golf, sports and active pursuits |
| <input type="checkbox"/> Food and dining | <input type="checkbox"/> Historic Houses & Gardens |
| <input type="checkbox"/> Events and festivals | <input type="checkbox"/> Retail & shopping |
| <input type="checkbox"/> Other (please specify) | |

4. What hidden gems in the Copper Coast may represent viable tourism development, investment or promotional opportunities?

5. What improvements or enhancements are needed for tourism development and marketing (tick all as relevant)

- | | |
|---|--|
| <input type="checkbox"/> Development of more tourist accommodation | <input type="checkbox"/> Additional marketing spend |
| <input type="checkbox"/> Development of new types of tourist accommodation | <input type="checkbox"/> More effective marketing spend |
| <input type="checkbox"/> Enhancement of existing tourist accommodation | <input type="checkbox"/> Better presentation of towns and villages |
| <input type="checkbox"/> Enhancement and upgrading of existing attractions and facilities | <input type="checkbox"/> Better environmental stewardship |
| <input type="checkbox"/> Development of new fee paying visitor attractions | <input type="checkbox"/> Enhanced mobility and access to key locations and sites of interest |
| <input type="checkbox"/> Development of active outdoor pursuits | <input type="checkbox"/> Greater collaboration and coordination between stakeholders |
| <input type="checkbox"/> Improved information & Signage | <input type="checkbox"/> More non-fee paying visitor attractions |
| <input type="checkbox"/> Improved touring route development & way-finding strategy | <input type="checkbox"/> Improved online presence and digital marketing |
| <input type="checkbox"/> Greater promotion in the domestic market | <input type="checkbox"/> Defining a coherent message and unified tourism proposition |
| <input type="checkbox"/> Greater promotion in the International market | |
| <input type="checkbox"/> Other (please specify) | |

6. How might the villages in the Copper Coast be developed or enhanced to increase tourism "dwell time" and spend?

7. Which development and marketing initiatives are most relevant to the development and promotion of tourism in the Copper Coast? (tick as relevant)

- Ireland's Ancient East
- The Munster Vales
- Visit Waterford
- The Copper Coast Geopark
- The Waterford Greenway
- Ireland -Wales Celtic Routes
- Existing local event and festival promotion
- A new cluster, collaborative or marketing network/initiative
- Integration and promotion of the area within a county-wide tourism initiative
- All
- Other (please specify)

8. Can you identify the key stakeholders (agencies, organisations, companies, individuals, communities, voluntary organisations, etc) whose role and resources are critical to tourism development and marketing in the Copper Coast?

9. Please feel free to add any further comments, suggestions or observations. Should you wish to discuss the Copper Coast Tourism Action Plan further, please leave contact details.

10. If you would like to meet or discuss the Copper Coast Tourism Action Plan further, please leave contact details. Meetings can be facilitated on a one to one or group basis as necessary.

Appendix 3: 2019 Tidy Towns Adjudication Reports

Tidy Towns Competition 2019

Adjudication Report- Stradbally

Centre: **Stradbally** Ref: **235**
 County: **An tSráidbhaile** Mark: **342**
Waterford
 Category: **B** Date(s): **04/07/2019**
31/07/2019

	Maximum Mark	Mark Awarded 2018	Mark Awarded 2019
Community – Your Planning and Involvement	60	50	51
Streetscape & Public Places	60	45	46
Green Spaces and Landscaping	60	45	48
Nature and Biodiversity in your Locality	50	39	42
Sustainability – Doing more with less	50	18	19
Tidiness and Litter Control	90	60	61
Residential Streets & Housing Areas	50	32	33
Approach Roads, Streets & Lanes	50	41	42
TOTAL MARK	470	330	342

Community – Your Planning and Involvement / An Pobal - Pleanáil agus Rannpháirtíocht:

Cuireann an moltóir seo fáilte roimh Stradbally (An tSraidbhaile) páirt a ghlacadh i gComórtas Náisiúnta SuperValu Na mBailte Slachtmhara 2019. Congratulations on Stradbally's thirty-six years participation in the National Tidy Towns Competition! The coming together of Stradbally Tidy Towns and Stradbally AFC in a joint venture for the development of the Stradbally Soccer and Community Sports Field with sponsorship from business interests, the support of Waterford County Council and funding from a variety of sources is indicative of the wide ranging support the committee receives from the community and indeed community pride and commitment to their village. Thank you for the copy of the Landscape Development Plan for the village, we wish the community every success in its implementation. The map provided although comprehensive did not meet the requirements of the competition in that it did not designate projects identified on the map as M, N or FP (maintenance, new or future project). It is acknowledged that this was done on a separate page but it should have been featured on the map itself. The committee's use of social media in addition to the more traditional forms of communication is favourably noted; the appointment of a liaison person with both schools' augers well for the future.

Streetscape & Public Places / Sráid-Dreach & Áiteanna Poiblí:

Excellent streetscape along the main thoroughfare of Stradbally with no overhead service cables and attractive lamp standards is its most significant visual amenity and it is a pleasure to note the decision to adhere to your 'limestone' theme for the built environment. Shopfronts and the public house look well in their terrace; a few buildings and walls would benefit from cleaning / painting / colour washing as appropriate but the overall appearance of the built environment of the village is excellent. Saint James Church of Ireland features beautifully managed grounds and Saint James's National School is equally well presented. The church car park and graveyard look well too as do the grounds of both the Sisters of Mercy premises and the Barron Hall premises. Pairc Ui Chuimin clubhouse grounds and boundary treatment are an excellent introduction on this entrance to the village. Ballyvooney Cove, just a short distance from the village centre along Nunnery Lane, is a fine seafront amenity and it is a particular pleasure to note it has universal access.

Green Spaces and Landscaping / Spásanna Glasa agus Tírdhreachú:

The Village Green with its Sundial sculpture, seating and rose displays looked quite magnificent upon adjudication and could be said to be Stradbally's 'signature feature'. Lots of beautifully managed green spaces and roadside verges were admired and landscaping at the Handball Alley is visually stunning! Forge Boreen on High Street with its magnificent rose displays deserve a special mention also. The working relationship between the owners of Cove Hill and the Tidy Towns committee is commendable and both the community, and of course pollinators are the beneficiaries! Although much of the planting on the hill is very recent and therefore immature it makes a strong visual impact. The strategic placement of container flower displays and choice of sites for flower beds and shrubberies ensures a high visual amenity status for Stradbally. The new emphasis on planting methods and soil usage to reduce water needs in times of drought is exemplary!

Nature and Biodiversity in your Locality / An Dúlra agus an Bhithéagsúlacht i do cheantar:

The rethinking of Stradbally's landscaping programme to accommodate the needs of pollinators under the National Pollination Plan is well informed and laudable. Engaging the services of a consultant to identify the wildflowers and plants of hedgerow within the village and on approach roads and building on this is an excellent initiative and an important foundation on which to plan for the future. Many pollination beds and good signage explaining pollination will work to raise public awareness and may encourage householders to do likewise in their own private areas; it is good to note the involvement of both schools in planting for pollinators. To monitor the effectiveness of your work to enhance biodiversity visit <https://pollinators.ie/record-pollinators/fit-count/> for guidance on how to do this, it might be a good project for the

school children; we would love to know of the outcome in future adjudications. The playground in the sports grounds complex is a fine amenity and the sports grounds are neatly presented too.

Sustainability – Doing more with less / Inmharthanacht - Mórán ar an mbeagán:

The involvement of so many of Stradbally's households in home composting is a good foundation on which to plan for the reduction of waste within the community; that composters are held in stock by the committee and awarded as raffle prizes is an excellent initiative. The emphasis on water harvesting is equally significant when it comes to the economic use of resources. The committee should now try to measure outcomes in savings / reductions achieved as this type of feedback can be a great motivator to achieve even more or simply keep going. The contact made with the local tree surgeon for the acquisition of tree bark to use as bark mulch to keep down weeds is most imaginative. The plethora of other initiatives are interesting and useful also, do measure outcomes where possible, even an informed 'guesstimate' will be beneficial! Congratulations to those children and their teachers for their Green Flag success. The coverage of the Bring Bank with CCTV is favourably noted as are the figures for glass and textile recycling.

Tidiness and Litter Control / Slachtmhaireacht agus Rialú Bruscair:

It is a great credit to the community that Stradbally looked very tidy and litter free for adjudication both on its streets and on beaches. That all of the work involved is done by volunteers and community employment workers is highly commendable! The difficulties are appreciated when it is taken into account the popularity of the coves and the Copper Coast in general with visitors. Some construction work in progress was noted however, related untidiness was not too serious and will no doubt be short-lived. Litter bins at Stradbally Cove could be refurbished and perhaps the interpretive panels here also? The Public Toilets on the road to the cove appear to enjoy reasonably good maintenance. A stretch of plain cement finish wall beside /adjoining a single-storey dwelling would be visually improved with cleaning.

Residential Streets & Housing Areas / Sráideanna Cónaithe & Ceantair Tithíochta:

Rockville estate and View Mount Drive were both presented to the highest standard in terms of green spaces, identification stones, flower displays, shrubberies and maturing trees. Most dwellings are really well presented and there is an interesting mix of single two and three storey dwellings. Cill Aodha estate features beautifully managed green verges and spaces graced by healthy young trees. A painted terrace of houses along the main thoroughfare to the crossroads with Church Lane and Nunnery Lane catches the eye pleasantly. Grassed roadside areas to boundary walls of private dwellings along Nunnery Lane were admired. Saint James's Wood which features beautiful stonework to its boundary walls and with all of its dwellings featuring thatched roofs was also admired in respect of its green open spaces and nicely managed footpaths landscaped to their roadside edge. The 'Tobar Ban' feature at the entrance to the White Well Estate is charming.

Approach Roads, Streets & Lanes / Bóithre Isteach, Sráideanna & Lánaí:

Wild grasses and stretches of handsome natural stone walls work well together visually and of course provide valuable wildlife corridors and habitats for a variety of species. A lovely name stone on a well-managed green area followed closely by a name plate create an excellent first impression of Stradbally. Newly surfaced stretches of road are noted alongside well maintained road direction signage, cultural signage and street furniture in general.

Concluding Remarks:

Stradbally is a really beautiful village located within the beautiful and unique setting of the Copper Coast and the community can be rightly proud of their achievements!

Second Round Adjudication:

As relative newcomers to Stradbally we were greatly impressed by all we found there. It is a place that is modest in scale yet great in civic richness. What really strikes the visitor is the very impressive level that has been reached in the presentation of the public realm. The local committee deserves great credit for maintaining their dedication. It reflects a lot of thought and application. You are justly proud of many projects. We could see the extensive work undertaken on the roadside slope of Cove Hill. This is already looking well in its geometric pattern and we await the outcome as it matures and flourishes. The Cove itself is a place apart, providing an oasis of calm. The backdrop of trees, with the wind rustling through them, and the sea lapping on the lovely secluded beach was delightful. The area was well kept and the picnic bench was in full use during our visit.

As we travel around the country we have learned over the years that the condition of the public toilets often reflects the wider participation of the local community. Here, again, we found the public toilets down by the Cove are excellently maintained, in fact being amongst the cleanest and brightest we have seen. High Street boasted a wonderful bed of red roses set against a lovely stone wall. The surface of the village green was so well maintained you could play billiards on it! Stradbally is fortunate for being a little off the beaten track because that rules out excessive through-traffic. That also helps to cut down on litter, congestion and random parking. The bed at the Credit Union was eye-catching. The timber pollinator signs and the flower beds themselves were another attractive feature we saw. We also loved the planting at the handball alley at Chapel Road. It is another fine example of sustainable planting. The begonias throughout the village looked gorgeous.

Well done on taking on board last year's adjudicator's comments and obtaining a name plaque for St. James Wood estate. The housing standard throughout was excellent. Congratulations to the whole community for making Stradbally such a charming place to visit.

Cheapamar go raibh caighdeán an-árd bainte amach agaibh. Maisáonn na bláthanna an áit ar gach taobh. Tá saibhreas breá curtha agaibh leis an timpeallacht.

Tidy Towns Competition 2019

Adjudication Report - Fenor

Centre: Fenor – Fionnúir	Ref: 236
County: Waterford	Mark: 308
Category: A	Date(s): 03/07/2019

	Maximum Mark	Mark Awarded 2018	Mark Awarded 2019
Community – Your Planning and Involvement	60	44	44
Streetscape & Public Places	60	38	40
Green Spaces and Landscaping	60	37	39
Nature and Biodiversity in your Locality	50	44	45
Sustainability – Doing more with less	50	15	16
Tidiness and Litter Control	90	60	61
Residential Streets & Housing Areas	50	25	26
Approach Roads, Streets & Lanes	50	35	37
TOTAL MARK	470	298	308

Community – Your Planning and Involvement / An Pobal - Pleanáil agus Rannpháirtíocht:

Cuireann an moltóir seo fáilte roimh Fenor - Fionnúir páirt a ghlacadh i gComórtas Náisiúnta SuperValu na mBailte Slachmhara 2019. Thank you for Fenor’s continued participation in the Tidy Towns competition for over 24 years now, it has always been a pleasure to visit your lovely village and watch it grow and develop for the benefit of the local and wider community. The map submitted with this year’s application was good and all major landmarks were included which made it easy to use; however, projects for this year should have been designated N (new) M (maintenance) and FP (future projects) as appropriate in the map legend, this is a requirement for adjudication. It is a pleasure to know that so many of the objectives set out in the plan for Fenor have been achieved, well done! We wish you well for inclusion in the next village renewal scheme. Although the committee is quite small the number of helpers at thirty-four is impressive for a small

community of only 140 households. There is a strong network of support for Tidy Towns in Fenor and your Facebook page is an excellent way of generating interest in your work.

Streetscape & Public Places / Sráid-Dreach & Áiteanna Poiblí:

Mother McHugh's which has been repainted this year looks stunning. Congratulations on the re-opening of the Restaurant, the reinstatement / refurbishment of the Post Office will be a welcome feature of Fenor's built environment. The committee's pro-active approach regarding the large signs and their negative visual impact is favourably acknowledged.

It is great to note that the planned new public facility at the church will have universal access, all new developments (and older ones where possible) should be accessible to all. The church and graveyard are being neatly managed and the school and its grounds look well too, one wonders why its green flag was not flying. The Copper Kettle Restaurant and Mini Farm for children is an attractive element of the village, do include the resurfacing and landscaping of its car-park in your next Three-Year Plan.

Green Spaces and Landscaping / Spásanna Glasa agus Tírdhreachú:

Flower displays which feature along the top of the loose natural stone wall which runs the length of the village centre is a delightful feature. The creation of flower beds and the installation of container flower displays at strategic locations in Fenor are admired and complement wonderfully well-maintained grass verges throughout. The planting of 40 native species of tree at the northern end of the bog armed with plastic sleeves for protection from Deer is a fine achievement which will enhance bio-diversity. We wish you every success on the planned installation of the adult outdoor gym and the creation of an area for French Boules and look forward to seeing these in future adjudications; the planned Scout Den and Adventure Trail is an exciting development also which will add a new dimension to Fenor. Try to feature universal accessibility for all new developments; for more information go to universaldesign.ie

Nature and Biodiversity in your Locality / An Dúlra agus an Bhithéagsúlacht i do cheantar:

There are many exciting initiatives on-going in this category of the competition and Fenor Bog must be the envy of many entrants! Monitoring and maintenance work are impressive, an example is the management of invasive species by the removal of the invasive sycamore. New developments are intriguing; your adjudicator is impressed by the twice monthly Foraging Courses on Edible Seaweed and the monitoring of bats by UCC. The new gate and fencing at the bog are favourably acknowledged. The recently developed playground across from the church is a great success judging by the fun activities observed during adjudication. The play area and pet farm at the Copper Kettle Restaurant was in great demand also. Continue to ensure that all flowers in displays are pollinator friendly; for a list of these go to rhs.org.uk and pollinators.ie and visit the following web-site for guidelines on how to monitor their attraction for pollinators. <https://pollinators.ie/record-pollinators/fit-count>.

Sustainability – Doing more with less / Inmharthanacht - Mórán ar an mbeagán:

The list of projects engaged in for this category is substantial and many of the projects such as home water harvesting and home composting have at their core 'prevention at source' which is excellent. The Green Flag status of the school is applauded and it was a surprise not to see it flying high! The Blue Flag status of the beach is noteworthy too. Consideration might be given to a transport initiative such as a Walking Bus' or organised car-pooling / shared transport. Where possible quantify efficiencies achieved and use as feedback to participants, it will be a great motivator to remain engaged in sustainable living. The recycling point was neatly managed.

Tidiness and Litter Control / Slachtmhaireacht agus Rialú Bruscair:

The committee's pro-activity regarding visual clutter caused by overhead wires and inappropriate signage is appreciated by the adjudicator. Fenor's participation in The National Spring Clean and the inclusion of the beach and the woods in addition to the roadsides are impressive and laudable as is the Community Alert system in operation for forest fires. The detail of the waste recovered is quite shocking and contrasts sharply with the civic mindedness of the 22 adults and 14 children that took part in the clean-up. Your adjudicator agrees that it is impossible for a group of volunteers to segregate this type of waste and that your location within a short distance from two large centres is a significant factor in the problem; keep us up-to-date with details of how you plan to manage this appalling situation and good luck in your efforts.

Residential Streets & Housing Areas / Sráideanna Cónaithe & Ceantair Tithíochta:

The committee's efforts to address the problem of vacant dwellings in the core of the village are favourably acknowledged and we wish you future success in this respect. The majority of private dwellings within Fenor and environs are attractively presented, many gardens were admired. Encourage residents where appropriate to maintain the roadside boundary walls of their properties to as high a standard as the rest of their curtilage area; the same point can be made in respect of roadside areas to boundary walls.

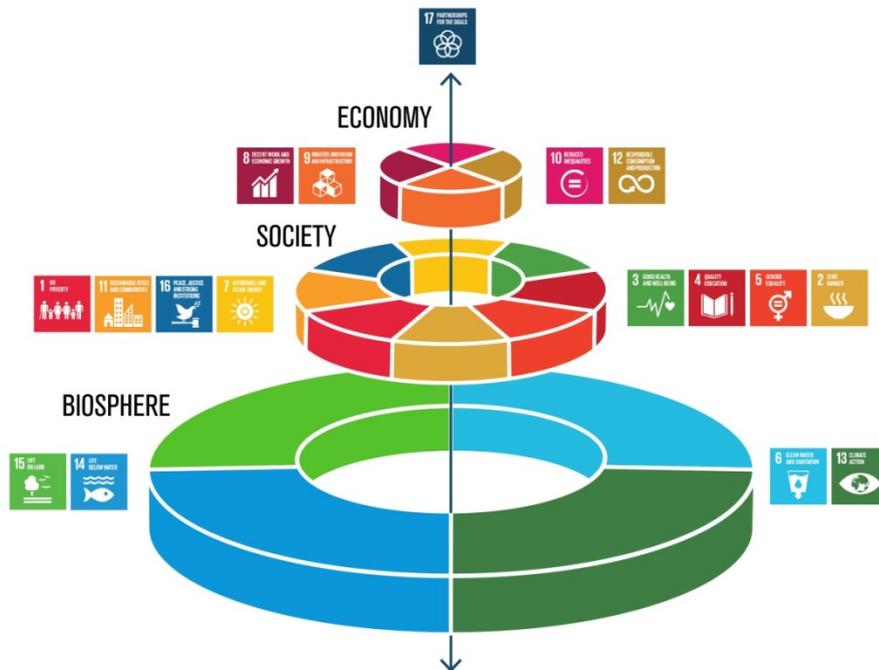
Approach Roads, Streets & Lanes / Bóithre Isteach, Sráideanna & Lánaí:

Both entrances to Fenor are attractively presented with good quality name-plates, landscaping, and nicely managed green areas all of which signals to the travelling public a pleasing experience ahead. Road signage is good too good and car-parking facilities reasonable. The sports grounds and clubhouse are well maintained however the car-parking area here needs refurbishment. Fenor's road bowling festival and 15K road race alongside a family cycle day and two tractor runs all of which are fundraisers sound like Fenor is a fun place in which to live and visit! Roadside verges look well in their natural state, the old black-and-white name plate should be refurbished. New fencing around the pond and new ranch type gates at the picnic facilities are fine installations too. We wish the community success in their application for the village renewal scheme and the planned refurbishment of the road for Road Bowling.

Concluding Remarks:

Fenor is a charming village full of delights and surprises with the range of activities and experiences on offer and your adjudicator will definitely be back for fun!

Appendix 4: United Nations Sustainable Development Goals (SDGs)



Graphics by Jenker Lohmeyer/Rosier

Appendix 5: The Climate Positive Design Toolkit

CLIMATE POSITIVE DESIGN TOOLKIT

		USE AS SUBSTITUTE FOR	DESCRIPTION / USE	CO2 BENEFITS & CO-BENEFITS	
PATHWAYS					
REDUCE EMBODIED CARBON IN MATERIALS	WOOD BOARDWALK/DECKING		CONCRETE, STONE, CONCRETE UNIT PAVERS	MINIMIZE AMOUNT OF CONCRETE AND STEEL SUPPORTS/FOOTINGS. DO NOT SPECIFY TROPICAL HARDWOODS TO PROTECT OUR CARBON RICH RAINFORESTS. SPECIFY LOCAL SOURCE IF POSSIBLE.	CO2 IS STORED IN WOOD AND REMAINS THERE AS LONG AS ITS INTEGRITY IS MAINTAINED.
	DECOMPOSED GRANITE		CONCRETE, STONE, CONCRETE UNIT PAVERS	SPECIFY ECO-FRIENDLY OR ORGANIC BINDER.	LOWER EMBODIED CARBON THAN OTHER PAVING MATERIALS. PERMEABILITY OF WATER THROUGH THE SURFACE IF NO BINDER IS USED.
	ASPHALT		CONCRETE, STONE, CONCRETE UNIT PAVERS	SPECIFY LOCAL OR RECYCLED AGGREGATE.	LOWER EMBODIED CARBON THAN OTHER PAVING MATERIALS.
	CHIP SEAL		CONCRETE, STONE, CONCRETE UNIT PAVERS	SPECIFY LOCAL OR RECYCLED AGGREGATE FOR BASE AND TOP COAT.	LOWER EMBODIED CARBON THAN OTHER PAVING MATERIALS.
	CO2 SEQUESTERING CONCRETE		CONCRETE (TYP. W/ PORTLAND CEMENT), CONCRETE UNIT PAVERS		CO2 IS CAPTURED FROM FACTORIES AND REMAINS IN THE CONCRETE.
	CONCRETE WITH CEMENT SUBSTITUTIONS		CONCRETE (TYP. W/ PORTLAND CEMENT), CONCRETE UNIT PAVERS	SPECIFY MAXIMUM ALLOWABLE PERCENTAGE OF CEMENTITIOUS SUBSTITUTIONS SUCH AS SLAG, FLY ASH, GLASS POZZOLAN, OR SILICA FUME.	LOWER EMBODIED CARBON THAN TRADITIONAL CONCRETE WITH PORTLAND CEMENT.
	RECYCLED-CONTENT UNIT PAVERS		CONCRETE UNIT PAVERS	SPECIFY HIGH % RECYCLED CONTENT	REDUCE HARVESTING OF VIRGIN MATERIALS.
	ENGINEERED WOOD FIBER (EWF)		RUBBER SURFACING	PLAY AREAS	WATER INFILTRATION. LOWER EMBODIED CARBON THAN WOOD CHIPS. PROVIDE END-OF-LIFE BENEFIT FOR WOOD RE-USE.
	WIELDED WIRE FABRIC (WWF) OR TEXTILE- REINFORCED CONCRETE (TRC)		REBAR	SPECIFY LARGE WVF SPACING AND LIGHT GAUGE IF POSSIBLE; SPECIFY GLASS REINFORCED TRC.	LOWER EMBODIED CARBON
	NATURAL DRAINAGE SWALES AND BIORETENTION AREAS		HDPE PIPE, CAST, IRON	NATURAL DRAINAGE STRATEGIES THAT MINIMIZE THE USE OF PIPING.	PERMEABILITY OF WATER THROUGH THE SURFACE. HABITAT CREATION IN DRAINAGE WAYS.
	LIGHTWEIGHT FILL		FOAM, CELLULAR CONCRETE	USE ON GREEN ROOFS.	LOWER EMBODIED CARBON THAN FOAM OR CELLULAR CONCRETE.
	RECYCLED MATERIALS FROM THE SITE - CONCRETE		CONCRETE, ASPHALT	SEATING AREAS, PATHWAYS, TRAILS	PREVENTS CO2 EMITTED FROM OFFHAULING. MINIMAL EMBODIED CARBON DUE TO RE-USE.
	RECYCLED MATERIALS FROM THE SITE - ASPHALT		CONCRETE, STONE, ASPHALT	CAN BE GROUND INTO AGGREGATE BASE.	PREVENTS CO2 EMITTED FROM OFFHAULING.
	RECYCLED MATERIALS FROM THE SITE - STONE		CONCRETE, ASPHALT	CAN BE GROUND INTO AGGREGATE OR KEPT IN LARGER PIECES FOR PATHWAYS.	MINIMAL EMBODIED CARBON DUE TO RE-USE.
	AGGREGATES		CONCRETE, STONE, ASPHALT	SEATING AREAS, PATHWAYS, TRAILS.	LOWER EMBODIED CARBON THAN OTHER PAVING MATERIALS.
WALLS/FENCES/FURNISHINGS					
WOOD		ALUMINUM, STEEL, CONCRETE	MINIMIZE AMOUNT OF CONCRETE FOOTINGS. DO NOT SPECIFY TROPICAL HARDWOODS TO PROTECT OUR CARBON RICH RAINFORESTS. SPECIFY LOCAL SOURCE IF POSSIBLE.	CO2 IS STORED IN WOOD AND REMAINS THERE AS LONG AS ITS INTEGRITY IS MAINTAINED.	
RAMMED EARTH		ALUMINUM, STEEL, CONCRETE	MINIMIZE AMOUNT OF CONCRETE FOOTINGS.		
RECYCLED MATERIALS FROM THE SITE - BOULDERS		ALUMINUM, STEEL, CONCRETE	PREVENTS CO2 EMITTED FROM OFFHAULING.	PREVENTS EMBODIED CARBON OF IMPORTED MATERIALS.	

Appendix 6: Acronyms

Central Statistics Office	CSO
Copper Coast Geopark CLG	CCG
Copper Coast Community Outreach CLG/ 35 th Waterford Copper Coast Scouts	CCCO
Dunhill, Fenor, Boatstrand and Annestown Community Enterprise Ltd	DFBA
Dunhill Multi Education Centre/ Suide Iol Oidis Duin Aill	DMEC
Dunhill Rural Enterprises Ltd	DREL
Fáilte Ireland	FI
Fisheries Local Action Group	FLAG
Global Sustainable Tourism Council	GSTC
Heritage Council	HC
Ireland's Ancient East	IAE
Irish Architecture Foundation	IAF
Irish Museums Association	IMA
Irish Peatland Conservation Council	IPCC
Irish Sports Council	ISC
Irish Water	IW
Local Enterprise Office	LEO
National Parks & Wildlife Service	NPWS
National Trails Office	NTO
National Transport Authority	NTA
Office of Public Works	OPW
Sustainable Energy Authority of Ireland	SEAI
Transport Infrastructure Ireland	TII
Tidy Towns	TT

Tourism Destination Management Organisation	TDMO
United Nations Educational, Scientific & Cultural Organisation	UNESCO
Visitor Experience Development Plan	VEDP
Visit Waterford	VW
Waterford City & County Council	WCCC
Waterford LEADER Partnership CLG	WLP
Waterford Sports Partnership	WSP



The Copper Coast: George Munday/Alamy Stock Photo