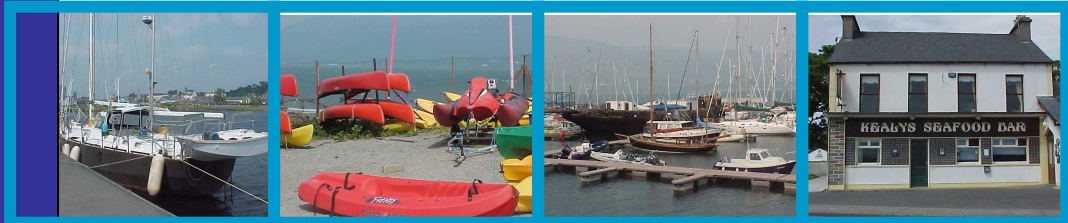




**A STRATEGY AND ACTION PLAN FOR THE
DEVELOPMENT OF MARINE TOURISM AND
LEISURE
in
LOUGH FOYLE
AND CARLINGFORD LOUGH
Areas**



PREPARED FOR

The Loughs Agency

East Border Region Committee

North West Region Cross Border Group

March 2007

CONTENTS	PAGE
EXECUTIVE SUMMARY.....	1
1. INTRODUCTION	10
2. MARINE TOURISM: DEFINITION	18
3. CONTEXT REVIEW	20
4. MARINE TOURISM: MARKET TRENDS	33
5. MARINE TOURISM: SOCIAL & ECONOMIC SIGNIFICANCE.....	60
7. EVALUATION OF MARINE TOURISM FACILITIES	91
8. SWOT ANALYSIS	96
9. VISION AND STRATEGY	107
10. ORGANISATIONAL STRUCTURE	118
11. ACTION PLAN	126
APPENDIX 1 - ILLUSTRATION OF AUDIT	139
APPENDIX 2	140
WORKSHOP - ATTENDEE LISTINGS	140

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1. EXECUTIVE SUMMARY

INTRODUCTION

In 2004, the Loughs Agency commissioned Tourism Development International to prepare strategy and action plan for the development of marine tourism and leisure in Lough Foyle and Carlingford Lough.

The overall objective of this study is to examine the development potential of marine – related tourism and recreational activities in the Carlingford Lough and Lough Foyle and to recommend a strategic plan for the realization of that potential.

Marine Tourism is the sector of the tourism industry that is based on tourists and visitors taking part in active and passive leisure and holidays pursuits or journeys on (or in) coastal waters, their shorelines and their immediate hinterlands.

Marine Leisure is a collective name for a full range of activities or pursuits that are undertaken by local people, tourists, and day visitors in these marine related localities.

The assignment was carried out in two stages. For the initial stage, Tourism Development International examined the current situation in the two Loughs. This involved a comprehensive consultation programme, an audit of existing marine tourism and leisure facilities, field visits, policy review and examination of trends in tourism and marine tourism and leisure demand. On completion of these tasks the consultants prepared a S.W.O.T analysis for the two areas in terms of their potential as marine tourism and leisure destination.

A series of team brainstorming sessions were held with a view to determining the most appropriate vision and positioning for the two Loughs in the marketplace. A Strategy and Action Plan was subsequently formulated for the realization of these visions and desired positioning.

This Executive Summary sets out the following in respect of both Loughs:

- Evaluation of Marine Tourism Facilities
- Overall Vision
- Strategic Aims
- Implementation

2. LOUGH FOYLE

Tourism Development International carried out a comprehensive audit and evaluation of marine tourism facilities on Lough Foyle. The findings can be summarized as follows:

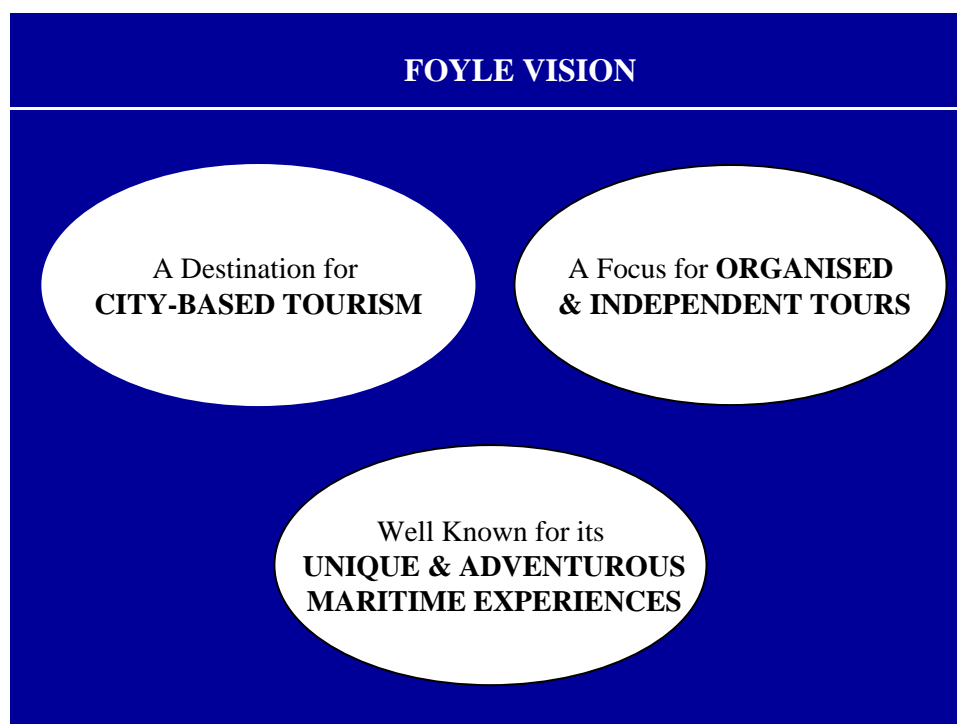
2.1. Evaluation of Marine Tourism Facilities on Lough Foyle

- Accommodation
 - Mainly Derry/ Limavady
 - Predominance of static caravans in relation to beaches - poor match with emerging markets
 - Difficult to find enough/right type accommodation for events.
- Key Attractions
 - Derry quayside events, Foyle regatta, Moville regatta
 - Benone beach and events
 - Malin head
 - Irishowen landscape and scenic drive(undersold)
- Markets and Participants
 - Mainly domestic in Benone – some international Derry/Donegal
 - Not promoted as lough/ area
- Activities
 - Wide range of marine activities, limited keelboat and dinghy activity, sea angling, diving, surfing, kite surfing, kite boarding all with local and tourism participant. Lake water activities in Creggan CP Derry.
- Activity Service
 - No sheltered berths for local and visiting yachts.
 - One non residential activity centre.
 - Yacht/boat club service local people all year round and visitors at events.
 - Opportunities for training and progression in dinghies, keelboats, powerboats, surfing mainly for local people
 - Fully service sea angling opportunities but limited capacity.
 - Otter activities DIY
- Facilities
 - Poor infrastructure for keelboats, sea angling boats and small recreational craft (though good projects in the planning stage). No ‘destination’
 - Poor beach service except Benone

- Mobility
 - Poor/ no public transport links to activities
 - No public transport serving both sides of the lough
 - Potential loss of scenic rail journey along the Foyle
 - Ferry at Greencastle/ Magilligan
- Information
 - Most information presented separately for North and South; lack of integrated/coordinated approach.
 - Management and Regulation
 - Modern by laws in progress for all Lough Foyle (to narrows) under jurisdiction of L'derry Port and Harbour Commissioners.
 - Beach wardening and zoning scheme at Benone
 - Normal international rules of the road operate on the lough
 - Some issues between jet skis and commercial shipping.
- Safe and rescue
 - Well covered by N&S emergency service, Foyle Rescue and RNLI

2.2. Vision for the Foyle Area

The vision is that in 10-15 years time, Lough Foyle and its maritime hinterland will be well established as a destination for city-based tourism, as a focal point for organized and independent tours and, especially, as a part of the island of Ireland that is well known for its unique and adventurous maritime experiences.



A Significant Destination for City-based Tourism:

focused on Derry and its surrounding area, where the usual city break components (accommodation, entertainment, food and drink, heritage attractions, tours, shopping, etc) will be complemented by a range of appropriate marine tourism experiences, such as river cruises and dining; boat excursions; adventure boating; coastal tours; and more active pursuit opportunities.

A Focal Area for Organized and Independent Tours:

including cruise ship visits; coach tours; special interest field trips; explorations on the North Atlantic Trail and the North Donegal Visitor Trail; other independent tours (car-borne, motorcycles, cycles); and day visits by tourists staying in the significant adjoining tourism destinations of Donegal and the Causeway Coast. These touring visitors will be attracted into the area for at least one night or for the best part of a day.

Well known for Unique and Adventurous Experiences:

including sailing/boating (including teaching); cruising; sea angling; diving; wildlife watching; and other adventure boating, supported by a new marina on the eastern coast of Inishowen; much extended Berthage at Derry's waterfront; improved accommodation at Culmore; and new boating facilities at Bunagee (Culdaff).

An Attractive Area for Achievement Seekers:

especially visitors to Ireland's most northerly point (Banba's Crown at Malin Head); long distance walkers/cyclists; those who want to enjoy the thrills of more adventurous activities (eg RIB trips, rock climbing, seeing the wrecks); and wildlife spotting. The variety of experiences will be a major strength.

Other opportunities to support the vision:

- A centre of excellence for beach –based activity
- A strong base for multi- activity tourism breaks
- A well known – marine events venue
- An important source of tourism visits to surrounding areas
- The result of cross – border co – operation
- An exemplar of sustainable tourism development

3. CARLINGFORD LOUGH

A comprehensive audit and evaluation was also carried out for Carlingford Lough. The findings of this audit and evaluation can be summarized as follows:

3.1 Evaluation of Marine Tourism on Carlingford Lough

- Accommodation
 - Mainly south side
 - Predominance of static caravans in north
 - Activity hotels
 - Difficult to find enough accommodation for events
- Key Attractions
 - Carlingford town, castle and heritage, the views, Kilbroney Park and Rostrevor Forest, festivals and yachting events.
- Markets and participants
 - Mainly domestic on north side – some international on south linked with Carlingford and Tàin

- Activities
 - Whole range but mostly keelboat and dinghy sailing, swimming and beach visits, sea angling, sea kayaking and jet ski/water ski
- Activity Services
 - Full service for keelboats at Carlingford
 - Activity centres mainly for young people but full service at Carlingford
 - Yacht club service local people all year round and visitors at events.
 - Good opportunities for training and progression in dinghies and keelboats
 - Full service sea angling
 - Other activities DIY
- Facilities
 - Poor infrastructure for keelboats and small recreational craft around Warrenpoint
 - Few opportunities to eat local seafood outside Carlingford
 - Only one major hotel
- Mobility
 - Poor public transport to activities
 - No public transport serving both sides of the lough
- Information
 - Mostly disjointed with North and South presented separately. This is changing, e. g. joint touring guide
- Management and Regulation
 - Modern by laws at Warrenpoint (Harbour Authority) and Cranfield
 - Beach wardering and zoning scheme at Cranfield
 - Normal international rules of the road operate on the lough
 - No capacity to make whole lough by – laws or coordinate management arrangements
 - Some issues between jet skis and other recreational activities
 - Unregulated jet ski and other fast powered craft launches except at Cranfield.
- Safety and Rescue
 - Well covered by N&S emergency service and RNIL but no inshore station within the lough

3.2 Vision for Carlingford Lough

After the next 10-15 years, the vision is that the Carlingford Lough Area will be well established as a central part of “the outdoor playground of Ireland.” While it will continue to function (but more effectively) as a scenic location for seaside holidays, and touring, its future key role is expected to focus on its ability to cater for a wide-range of outdoor activities (within and outside the catchment). More specifically, it is envisaged that the area will be:



A Base for Activity Holidays Breaks Centred Locally and in the Wider Area:

some existing accommodation providers offer activity breaks but the vision assumes that there is considerable potential to formalise such offers and to increase the number sold. This would have to be accompanied by a substantial increase in the range of accommodation available. Also, the establishment of tourism breaks by these accommodation providers will be the result of close co-operation with a “cluster” of other businesses and organisations in the area (eg. activity organisers and tutors; boat owners; equipment hirers and repairers; food and beverage specialists; visitor attractions; safety bodies; event organisers; and promoters of tourism).

A Centre of Excellence for Water-based and Beach Activity:

Centred at Cranfield and Carlingford and including well-managed activities on the beach and in the water (sailing, cruising, sail-boarding,

waterskiing, jet-skiing). In particular, the area is expected to cater for the full range of competency in these activities (ie. learning, improving, perfecting, specialising and competing).

A Popular Port-of-Call and Boating Base:

attracting significantly more visiting boats and boating activity in the Lough, as a result of the development of a marina on the eastern shore and the addition of mooring/berthing provision in other parts. It is also expected to become the focal point of at least one major annual yachting event.

Other opportunities to support the vision

- A focal point for organised and independent tours
- A well – known marine events venue
- An important source of tourist visits to surrounding Areas
- The result of cross- boarder co- operation
- An exemplar of sustainable tourism development

4. IMPLEMENTATION

The expansion of marine tourism and leisure activities in the Carlingford Lough and Lough Foyle areas will require a careful and competent management approach to ensure that they are eminently attractive to the target markets, safe and sustainable. It must also avoid leading to conflict either between different activities or between activities and other operations such as shipping, fisheries or aquaculture on the loughs.

It is also clearly evident that co-ordination will be required between North and South, between various agencies of state, and between these state agencies and the private and voluntary sectors.

The Loughs Agency has a pivotal role to play in the implementation of the Marine Tourism and Leisure Strategies for the Carlingford Lough and Foyle Lough areas.

However, the involvement of other agencies with complementary skills and resources will be necessary in order to bring this process forward.

Critical in this regard will be the stakeholder group and the two area sub groups each of which will play a key role in supporting the Loughs Agency (Management Board) and the dedicated management team that will be put in place to implement marine tourism and leisure policies.

Key in regard to this will be the necessary high profile public consultation of the document to ensure awareness and buy in from the plethora of stakeholders and bodies charged with a statutory responsibility for marine Tourism within the two catchments.

The next step in this project will involve the preparation of a five year Development Plan for Marine Tourism and Leisure on Lough Foyle and Carlingford Lough. The objective of Development Plan will be to identify and prioritize feasible projects.

1. INTRODUCTION

This report has been prepared by Tourism Development International on behalf of the Loughs Agency. The original draft of the report was submitted to the Loughs Agency in January 2005.

Following a period of review and consultation with key stakeholders in February 2007, the Loughs Agency retained Tourism Development International to update statistical information in relation tourism and marine tourism trends (Chapter 4-5) and the context review (Chapter 3)

In the light of the developments that have taken place since January 2005 adjustments have also been made to the Organization structure (Chapter 10) and the Action Plan (Chapter 11)

BACKGROUND

THE PARTNERS IN THE STUDY

The Loughs Agency

- 1.1 The Loughs Agency is one of the cross-border bodies set up under the British-Irish Agreement Act of 1999. It has taken over the functions of the Foyle Fisheries Commission (a cross-border body established in 1952 to conserve manage and protect the fisheries of the Lough Foyle Area). It was also given responsibility for another cross-border area around Carlingford Lough.
- 1.2 The Agency's main functions, as set out in the Act, are:
 - Promotion and development of Lough Foyle and Carlingford Lough, for recreational purposes;
 - Conservation, protection, management and development of inland fisheries;
 - Development and licensing of aquaculture; and
 - Development of marine tourism.
- 1.3 The Act declared that part of the latter function would include:

“...the preparation of a strategic plan for marine tourism in the Foyle and Carlingford Areas and the promotion and marketing of those Areas (including by

grant aid) and co-ordination and delivery of the development strategy.” (Part 6, para 4.1)

The East Border Region Committee

- 1.4 The East Border Region Committee is one of three local authority led cross border networks on the Ireland/Northern Ireland border. It comprises six local authorities, Newry & Mourne, Down, Banbridge District Councils and Craigavon Borough Council in Northern Ireland and Louth and Monaghan County Councils in the Republic and has a total population of some 400,000. Since its formation in the 1970s, the Committee has endeavoured to promote the development of the region as a vibrant economic unit.
- 1.5 Following the completion in 1998 of an Integrated Economic Development Strategy, five priority themes for development in the region were identified.
 - Tourism
 - Indigenous Business Growth (including inward investment)
 - Infrastructure and Environment
 - Community Economic Development
 - Human Resource Development (including Education)
- 1.6 In order to facilitate a truly co-ordinated partnership approach, the Committee extended to include key players from the statutory, public, private and community sectors in the region
- 1.7 The East Border Region Committee along with its counterparts ICBAN and NWRCBG plays a significant role in the administration of the INTERREG III monies, with particular reference to cross border Economic Development.

The North West Region Cross Border Group

- 1.8 The North West Region Cross Border Group is made up of Derry City Council, Strabane District Council, Limavady Borough Council and Donegal County Council and represents a population in excess of 300,000 constituents. The Group has been in existence for over twenty-five years and, since 1993, has had a full time secretariat funded by the INTERREG Programme.

The Group aims to strengthen and develop the local economy so that general living conditions of the area improve.

- 1.9 This report is presented to the Loughs Agency and its border region partners as the recommended strategic plan for marine tourism in the Loughs Areas

The Foyle Area

- 1.10 The Foyle Area includes the entire catchment area of the River Foyle, Lough Foyle itself and the area seaward of Lough Foyle (Figure 1.1). The river catchment area covers over 3,600 sq kms, astride the border in counties Donegal, Tyrone and Londonderry.
- 1.10 More specifically, it includes:
- “(a) the whole of the sea along the coast between the low water line of the northern most point of the Malin Head in County Donegal and the low water line at the sea point of the boundary between the townlands of Downhill and Drumnagally in the County of Londonderry; and the area seaward of Lough Foyle extending 12 nautical miles from the low water mark, any islands and rocks within the same, with the whole of the tideway along the coast; and*
- (b) the whole of the lakes, rivers and their tributaries which flow into the sea within the area defined in Para (a) above and all the land catchment from which the water drains into those lakes and rivers.”*
- 1.11 The catchment area includes the rivers Dee, Cullinagh and Finn in Donegal; and the rivers Faughan, Roe Burn Dennett, and Mourne (and its tributaries, the Glenelly, Owenkillew, Strule and Derg), in Northern Ireland.
- 1.12 The Foyle system is renowned as a highly productive and stable salmon fishery. A comprehensive management regime, put in place by the Foyle Fisheries Commission in the 1970s, means that it now produces an annual average of 35,000 salmon for the commercial fishery and an estimated 10,000 for angling.
- 1.13 The fisheries resource of the Foyle Area also includes coarse fish, eels, shellfish (primarily oysters and mussels), crustaceans and marine fish. To date, the emphasis for the Loughs Agency has been on the management of the salmon resource, and to a lesser extent on the trout resource (sea trout and brown trout).
- 1.14 As described by its definition above, the Foyle Area includes Malin Head, the most northerly point on the island of Ireland. It also includes an eastern part of the Inishowen Peninsula, with its main settlements of Greencastle, Moville and Muff, all on the shores of Lough Foyle.
- 1.15 The historic City of Derry/Londonderry is the main urban focus of the whole area. It has undergone a considerable amount of commercial

development in recent years and is becoming increasingly popular as a tourism destination, primarily for city breaks and cruise ship visits.

- 1.16 On the eastern side, the area includes the towns of Limavady and Dungiven. Most notably, from a tourism point of view, the eastern boundary also includes the beach and resort area of Benone in Limavady District, all of which is part of the Causeway Coast and Glens, the prime tourism destination in Northern Ireland.
- 1.17 Inland, the Foyle Area stretches westward beyond Stranorlar and Ballybofey in Donegal, to the eastern edges of the Blue Stack Mountains. It also stretches south, well beyond Strabane and Lifford, to the town and district of Omagh. This means that it includes a large part of the Sperrins area, which is strongly promoted as a tourism destination.
- 1.18 In spite of the extensive landward expanse of the Foyle Area, this strategy for the development of marine tourism concentrates mainly on the Inishowen section, Lough Foyle, the City of Derry/Londonderry and coastal Limavady.

Carlingford Area

- 1.19 The Carlingford Area includes Carlingford Lough and the rivers flowing into it from counties Louth, Down and Armagh, primarily the Whitewater and Clanrye (Figure 1.2).
- 1.20 More specifically, it includes:

“(a) the whole of the sea along the coast between the low water line of the most southerly point of Cranfield Point in the County of Down and the low water line of the most easterly point of Ballagan Point, in the County of Louth, and within a straight line between these points, and any islands or rocks within the same, with the whole of the tideway along the coast; and

(b) the whole of the lakes, rivers and their tributaries which flow into the sea within the area defined in Para (a) above and all the land catchment from which the water drains into those lakes and rivers.”

- 1.21 The primary fishery resources of the Carlingford Area are seatrout and mussels, but coarse fish and salmon are also found and there is potential for the development of sea angling for tope and bass.
- 1.22 The area’s south-west boundary runs through the middle of the Cooley Peninsula and includes the increasingly popular tourism destination of Carlingford town. Further north, the area includes an eastern part of

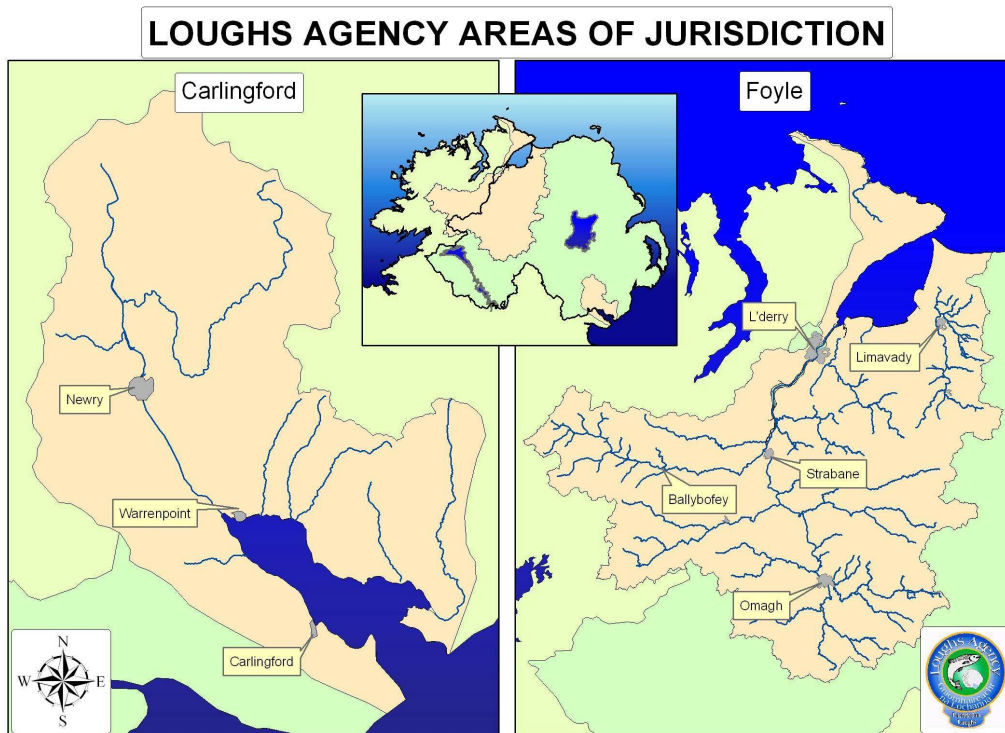
South Armagh, including the attractive countryside of Slieve Gullion and historic Bessbrook.

- 1.23 To the east of Carlingford Lough, the area includes a western section of the Mountains of Mourne and other popular tourism destinations in the Cranfield area, Rostrevor and the port of Warrenpoint.
- 1.24 The area's main urban focus is the City of Newry, a busy commercial centre, which is over 5 miles from Carlingford Lough but connected to it by the Newry Ship Canal. Inland from Newry, the catchment area stretches into rural Armagh and Banbridge.
- 1.25 As in the case of the Foyle Area, in spite of the extensive landward expanse of the Carlingford Area, this strategy for the development of marine tourism concentrates mainly on the Cooley Peninsula section, Carlingford Lough, and coastal stretch between Warrenpoint and Cranfield. However, account will be taken of the potential influence of certain attractive inland areas, especially The Mournes.

RECREATION, TOURISM AND THE LOUGHS AGENCY

- 1.27 As described above, the Loughs Agency is responsible for:
 - Promotion and development of Lough Foyle and Carlingford Lough, for recreational purposes; and
 - Development of marine tourism.
- 1.28 In pursuit of these functions, the Loughs Agency recognises the considerable potential of the two Loughs Areas for development to meet the growing demand for tourism and leisure (over and above game angling which has, so far, been its main focus of attention). It also recognises that there are potential benefits from such development for the cross-border areas around the Loughs.
- 1.29 In considering the requirement for the preparation of a strategic plan for marine tourism in the two Areas, the Loughs Agency is aware that fundamental issues to be addressed are:
 - The definition of marine tourism and how it relates to the Agency's core responsibilities and the overlapping responsibilities of other agencies (particularly local development and tourism bodies e.g. local councils, area tourist boards) in both Loughs Areas and on both sides of the border;

- The lack of comprehensive and integrated information on the extent and implications of the current recreation and leisure resources in the freshwater and sea areas; and
- The potential for future development and the future role of the Loughs Agency in its realisation.



STUDY OBJECTIVES

- 1.30 The overall objective of this study is to examine the development potential of marine-related tourism and recreational activities in the Carlingford Lough and Lough Foyle areas, and to recommend a strategic plan for the realisation of that potential.
- 1.31 The specific requirements, as set out in the brief, are:
- An agreed definition of marine tourism and leisure
 - A description and evaluation of the current nature and extent of marine-related tourism and recreational activities in the Loughs Areas, which should consider existing facilities and information together with pending or proposed development.
 - Identification of future facilities to complement and strengthen the potential of the Loughs in relation to marine tourism and recreational activities.

- A SWOT analysis of the sector and an evaluation of the potential to develop the water-based tourism and recreational resource. This should include:
 - a) Development of the resource which must be environmentally, economically and socially sustainable and beneficial to the area;
 - b) Requirements under Equality Legislation including access to the resource (physical, opportunity, benefits etc);
 - c) Cross-border and cross-community development which are important aspects of the Loughs Agency's development role; and
 - d) New Targeting Social Need (New TSN)
- Identification of the role, if any, of the Loughs Agency, from an added value perspective, in promoting and developing the marine related tourism and recreational resource, and
- Recommendations on the development options that would enhance and sustain economic progress of the water-based tourism and recreational sector in the Loughs including:
 - a) Identification of possible sources of funding for any projects or developments.
 - b) A spatial database in GIS format compatible with the Loughs Agency's existing software.
- Analysis of the social and economic value of the marine tourism and recreational sector in the Loughs Area in relation to local and regional development for visitor and tourism use.

METHOD OF APPROACH

1.32 In responding to these requirements, the consultancy team's method of approach involved:

- An extensive consultation programme of face-to-face meetings;
- A number of formal meetings and workshops;

- An audit of existing marine tourism and leisure activities and facilities in the two Loughs Areas;
- Field visits to both areas to ensure full familiarisation with sites and locations in need of improvement or with potential for development;
- A review of all relevant policy documents and other texts that have to be taken into account in assessing the context of any proposals for the development of marine tourism and leisure in the two areas;
- A review of recent and anticipated trends in market demand for marine tourism and leisure;
- A SWOT analysis of the two areas in terms of their potential future roles as destinations for marine tourism and leisure;
- Team brainstorming sessions to come up with visions of how the two Loughs could be positioned in the marketplace for marine tourism and leisure;
- Formulation of a strategy for the realisation of these visions and identification of specific actions that would be required to implement that strategy (in the form of an Action Plan); and
- Assessment of the potential social and economic benefits that could arise from the successful achievement of the Action Plan.

ACKNOWLEDGEMENTS

- 1.33 The consultancy team is very grateful for all of the inputs and cooperation received during the process of preparing this Strategy and Action Plan, especially from all of the people contacted during the consultation process and the members of the Foyle and Carlingford Area Advisory Forum and the Marine Tourism Focus Group. The conclusions and recommendations, however, are the team's own responsibility.

2. MARINE TOURISM: DEFINITION

TOURISM

- 2.1 **Tourists** are people who are away from home for at least one night on holiday, on a leisure trip, on business, on a visit to friends and relatives, or for any other reason (except boarding education or semi-permanent employment).
- 2.2 **Day Visitors** are people on a leisure trip from home, lasting more than three hours, and returning home afterwards. They usually use the same facilities as tourists and participate in the same activities.
- 2.3 **Tourism** is that sector of the economy that is predominantly involved in meeting the needs of tourists and day visitors. It is concerned with people, the environment, activities, events, places, attractions, services, businesses, and facilities.

MARINE TOURISM

- 2.4 **Marine Tourism** is the sector of the tourism industry that is based on tourists and visitors taking part in active and passive leisure and holiday pursuits or journeys on (or in) coastal waters, their shorelines, and their immediate hinterlands.
- 2.5 **Marine Leisure** is a collective name for the full range of activities or pursuits that are undertaken by local people, tourists, and day visitors in these marine-related localities. They can be categorised as follows:

Non specialist leisure pursuits

- Coastal and waterside walking/exploring
- Swimming and beach activities
- Coastal drives (incl. sea watching from viewpoints)
- Scenic boat trips/visits (incl. to islands)
- Ferry trips
- Cruise ship visits (as passengers and local visitors)
- Going to visitor centres (aquaria, museums, heritage, etc)
- Maritime-related events and festivals
- Health therapy (e.g. Thalassotherapy)

Specialist pursuits:

Shore based

Sea cliff climbing
Sea level traversing/coasteering
Coastal horse riding
Sand yachting
Beach kite boarding
Shore based sea angling
Game angling (bank or wading)
Coarse fishing
Marine archaeology
Sailing model boats
Wildlife watching and bird watching

Water-based: Motorised

Boat trips – fast/ adventure/RIB
Boat trips- wildlife
Boat access – sub aqua diving
Boat based sea angling
Waterskiing and wakeboarding
Jet skiing
Power boating
Motor cruising

Water-based: Non-motorised

Sail boarding/Windsurfing
Sea kayaking (incl. kayak surfing)
River canoeing and kayaking
Keelboat sailing/cruising/racing
Dinghy sailing/cruising/racing
Rowing and Gig racing
Rafting (rubber boats)
Surfing
Kite surfing/boarding
Shore access sub aqua diving
Snorkelling

- 2.6 This Strategy and Action Plan is concerned with the development of Marine Tourism and Leisure. Thus, in the remainder of the text, all references to Marine Tourism also apply to the leisure activities and facilities upon which it is based.
- 2.7 In addition, at the request of the Loughs Agency, it excludes angling tourism (except boat-based sea angling) because it has been covered extensively by previous reports as follows.
- Fitzpatrick Associates 2002 **Audit of the fisheries based recreation and leisure resource in the Foyle and Carlingford Areas**
 - Lestas Consulting 2003 – **Five year development plan** for the fisheries based recreation and leisure resource in the Foyle and Carlingford Lough areas.

3. CONTEXT REVIEW

THE IMPORTANCE OF THE LOUGHS AGENCY

3.1 According to the British-Irish Agreement Act 1999, the Loughs Agency's functions include:

- Promotion of **development** of Lough Foyle and Carlingford Lough for commercial and **recreational** purposes
- **Development of marine tourism.**

3.2 In exercising these functions, it must:

- Prepare a strategic plan for the commercial and **recreational development** of the Foyle and Carlingford areas
- **Promote (including by grant aid) and co-ordinate delivery** of the development strategy
- Prepare a **strategic plan for marine tourism** in the Foyle and Carlingford areas
- **Promote and market** these areas for marine tourism (including by grant aid)
- **Co-ordinate delivery** of the marine tourism development strategy

3.3 Thus, the Loughs Agency is significant to marine tourism in the two areas because it is the cross-border body responsible for:

- Strategic Planning of Marine Tourism
- Coordination and Promotion of Development
- Marketing
- Grant aiding these activities

3.4 It represents a unique opportunity and challenge to plan the development of the two water bodies and their catchment areas as complete entities for marine tourism, without political boundaries.

- 3.5 In other words, this is a new opportunity to become involved in spatial, economic, social and environmental planning of marine tourism that is resource based, irrespective of boundaries.

LOUGHS AGENCY RESPONSE

- 3.6 One of the Lough's Agency's principal objectives is:

To maximise the economic, environmental, and social benefits obtained from marine tourism

- 3.7 To do so, its Corporate Plan shows commitment:

- To audit the state and extent of resources currently available to tourists
- To consult widely
- To prepare the strategic plan
- To establish linkages with other bodies with similar, overlapping and parallel roles and responsibilities

- 3.8 It will be an important consideration to determine how the Loughs Agency's significant development, marketing and funding roles, as set out under The Agreement, will be implemented in a way that takes account of the responsibilities of other bodies (including the Department of Culture, Arts and Leisure, the Environment and Heritage Service, Tourism Ireland, Northern Ireland Tourist Board, Fáilte Ireland and the Department of Communications, Marine and Natural Resources, local authorities etc.)

THE LOUGHS AGENCY'S PARTNER BODIES

- 3.9 In developing the marine leisure and tourism strategy, the Loughs Agency is partnered by two cross-border bodies, the **East Border Region Committee** and the **North West Region Cross Border Group**. Each, as discussed earlier, have strategic and funding roles for tourism and economic development and have brought forward programmes to support appropriate development, including marine tourism and associated initiatives.

THE NATIONAL AND REGIONAL TOURISM CONTEXT

- 3.10 The national tourism context is relatively complex. International tourism marketing is carried out by the cross border body **Tourism Ireland Ltd.**
- 3.11 Tourism policy in Northern Ireland is led by the **Northern Ireland Tourist Board** and in the Republic of Ireland since April 2003 by the National Tourism Development Authority - **Fáilte Ireland**,
- 3.12 NITB and Failte Ireland are responsible for in-country arrangements for delivering a quality tourism product on the ground for those visitors attracted to the island by Tourism Ireland Ltd. and also play a strategic role in domestic tourism promotion, events strategies, industry training, support and investment. For example, in relation to the strategy NITB will promote a Sea Northern Ireland under an overall Sea Britain events banner in 2005 with a focus on maritime events and activities.



- 3.13 Regional tourism authorities (ROI) and regional tourism consortia (NI) provide strategic marketing and co-ordination activity at area level with the following organisations having relevance to the strategy.
- 3.14 The **North West Regional Tourism Authority** (North West Tourism) is the coordinating body for the tourism industry in the North West region of ROI. The authority is responsible for promoting and developing tourism in the counties of Cavan, **Donegal**, Leitrim, Monaghan and Sligo and as such has a role in the development and promotion of marine tourism in the Donegal part of the Loughs Agency area. It represents over 1,300 of the main operators in Irish Tourism in the north west of Ireland.
- 3.15 North West Tourism aims in relation to the Donegal area are to:
- redress the regional imbalance in tourism distribution
 - increase overseas revenue to the region
 - secure new International Air Access via Derry
 - work more closely on an inter-regional basis with colleagues in Northern Ireland, with the aim of stronger destination marketing in the international market place
 - provide quality visitor services and continue maintain the product standards in the region.

- 3.16 **East Coast and Midlands Tourism** is the Regional Tourism Authority for counties: Kildare, Laois, Longford, **Louth**, Meath, Offaly, Westmeath and Wicklow. Its principal role is the marketing, development and servicing of tourism with the trade at both a regional and local level. It provides an advisory service on a wide range of products and services and operates a network of 15 tourist offices, which form part of the national network. It also represents the Irish Tourist Board at a regional and local level and processes European funding for tourism.
- 3.17 In Northern Ireland the **Derry Visitor and Convention Bureau, Causeway Coast and Glens Ltd** and **Kingdoms of Down** which formerly included the County Down side of Carlingford Lough are all supported by NITB as strategic marketing approaches to parts of the Loughs Agency areas. NITB also supports product groups relevant to the strategy such as Sail NI, Birdwatch NI, and the Cruise ships initiative. A regional approach to tourism in the Foyle area has also been undertaken by **North West Rural Development**, a cross border initiative between LEADER companies in Inishowen, Coleraine, Limavady and Derry. One of the first tourism development initiatives was the setting up of a website www.ruraltourismireland.com to promote the area on a cross-border basis.
- 3.18 The **Marine Institute's** research has had an important influence on marine tourism development policy over the years. Of particular relevance is its 1999 "Investment-based Strategy for the Water-based Tourism and Leisure Sector in Ireland 2000-2006" with its emphasis on:
- The existing and potential value of water-based tourism and leisure and the resulting positive benefits
 - The range of underdeveloped or undeveloped facilities in Ireland (e.g. small ports and harbours)
 - The fact that the lack of appropriate infrastructure for marine leisure – i.e. piers, slipways, and moorings – is the single biggest obstacle to developing the water-based tourism and leisure sector.
 - The need to look to enhance the clustering of activity, services and facilities within an area in order to strengthen the marine tourism product on offer, to yield essential synergies and to achieve economies of scale. The presence

of some activities already in place is seen as an advantage in developing a marketable cluster.

- The downstream benefits that can accrue from public sector investment in new and improved infrastructure

3.19 In their recently published (February 2007) Tourism Development Strategy (2007 – 2013), Fáilte Ireland identify Ireland's scenic landscape and seascape as a fragile resource that are coming under increased pressure to accommodate greater levels of development. The sustainability of the Irish tourism industry will be partly determined by how well landscape change is managed over the coming decades.

3.20 Ireland's 7,500 km long coastline and off – shore islands form some of its most valuable tourism resources and a significant proportion of tourism is at or near the coast.

The coastline is a fragile resource which is vulnerable to over – development and needs sensitive management to make sure that its scenic, ecological and cultural qualities are not spoiled.

Currently, Ireland's coastline does not benefit from a national Integrated Coastal Zone Management Strategy, which has been recommended by EU. This is considered essential to the sustainable management of the coastal zone.

3.21 Key challenges in relation to the coastal zone are:

- To protect and improve the coastal and estuarine water quality;
- To protect and enhance designed scenic coastal landscape and seascapes;
- To prepare a national 'integrated coastal zone management plan' to ensure the sustainable and co-ordinated management of the coastal resource;
- To improve the management of beaches

3.22 The marine sector and Ireland's historic towns and cities have not yet exploited their full potential

- Modern public facilities in Ireland and services for visitors, linked to best practice in beach management, are not as high as the standards commonly seen abroad
- The visitor marina network is incomplete, particularly along the west and north – west coastline.
- There are no clear policies around planning and foreshore issues for marine tourism.

- There is rather thin network of sailing, boating, watersports and dive centres. There are also very few marine or water – themed visitor centres, in key strategic locations.
- There are localised shortages of sea angling and small tourism vessels.
- Viewing point of the vessels for whale and dolphin watching are poorly provided compared with our neighbouring competitors.

3.23 Under the Tourism Development strategy, Fáilte Ireland administer a number of funding programmes which will assist in the development of Marine Tourism and the Island
These are:

Tourism infrastructure fund

The ‘Tourism infrastructure fund’ is needed to provide and maintain such facilities. This fund needs to be ring – fenced and would be for all public sector infrastructures, for example:

- Controlled access to environmentally sensitive areas;
- Signposting;
- Water based facilities;
- Marinas
- Leisure route development (walking and cycling particularly)

Fund for undertaking feasibilities studies and product innovation - € 3 million annual average

Enterprise Irelands innovation funds have been a worthwhile stimulus to other sectors. Given that the tourism sector is completely open to international competition, innovative proposals are the key to the future. There is real potential to generate new demand by providing finance to support such activity.

Fund for private - sector investment in ‘soft – adventure’ products - € 4 million annual average.

There are key products provided by the private sector that are critical to the continued viability of some rural tourism nodes. These products include:

- Water – sports centres and boat rental;
- Other outdoor activity centres and facilities

Less developed coastal areas, as well as the Midlands, should be prioritised for support of these types of activities.

3.24. Put marine plan in place

A plan for the marine sector is being developed. Fáilte Ireland will work with the other Government Departments and agencies to implement the plan. The plan will support public facilities like marinas and water – sports. This type of support can effectively stimulate activity in regional areas.

3.25 The Department of Communications, Marine, and Natural Resources has amongst its core policy goals:

“To help secure the sustainable development of the marine tourism and leisure sector in the context of overall tourism development.”.

3.26 As a follow-on from its Investment Programme research, the Marine Institute published a “Development Strategy for Marine Leisure Infrastructure” which identified priority locations for the development of infrastructure for marine tourism. The only location identified with the Loughs Agency areas is Moville/Carrickrory on the Foyle for a small-scale development (defined as providing 0-25 berths with slipway/pier construction and maybe a small marina).

3.27 In Northern Ireland, the strategic response to the development of marine tourism has been much more limited. No Government Department has issued any major strategic initiative of direct relevance.

3.28 However, NITB’s recent “Strategic Framework for Action 2004-2007” focuses on 5 “winning themes”, including short breaks, excellent events and activity tourism, all of which to some extent have connections with the development of marine tourism. Similarly, NITB’s 5 signature projects includes development of “The Walled City of Derry” as a unique destination and this has obvious relevance to what can be provided at or on the Foyle, as part of the overall product on offer to visitors. Similarly, the Mountains of Mourne form another signature project and this will help to draw more people into the Carlingford area, as will the NITB’s proposed St Patrick Trail (passing through Newry) that is currently being developed as part of the St Patrick signature project.

3.29 Statutory agencies and other voluntary sports bodies with an interest in countryside recreation, either as a provider, funder or representative body, have chosen to work together in a strategic

way and have formed a formal network called the Countryside Access and Activities Network (ie.CAAN). The body is a company limited by guarantee, is core funded by Environment and Heritage Service, NITB and Sports Council, and is charged with providing strategic direction in its field. The body has developed an agreed countryside recreation strategy for Northern Ireland and has begun the process of implementation. To date it has produced a series of Waymarked Ways, some of which are coastal, and has brought forward strategies for the development of canoeing, mountain biking and horse riding trails. At present, only the proposed Foyle canoe trail from Omagh to Derry is relevant to this study.

- 3.30 CAAN has three specialist sub committees covering land, water and air based countryside recreation activities. The representative bodies for the countryside sports all sit on CAAN and its sub committees and there are also representatives of providers of outdoor activities.
- 3.31 CAAN has also brought forward, with partners, a series of 5 area based countryside recreation strategies for the Mourne, Causeway Coast, Sperrins, Fermanagh, and South Armagh. Four of these strategies are relevant to the Loughs Agency areas and are discussed in the local context sections below.
- 3.32 Marine leisure and tourism is dependent on a number of factors and cannot reach its potential without a number of other agencies acting together.
- 3.33 Underpinning development in most specialist activities is a great deal of activity within the voluntary sector. Examples of this include regattas and sailing events where clubs work for months on a voluntary basis to ensure that arrangements are safe, up to standard and enjoyable. This is similar to more general tourism where events and festivals provide an important sense of place and opportunity for entertainment for the visitor. Activity tourism in marine areas is however underpinned by a number of elements not common to all tourism. This includes:
 - The development of training and qualification of key people such as kayak, surfing, sailing, diving, and other activity instructors.
 - The development of yacht masters, charter skippers, angling guides, wildlife interpretation skills.
 - The maintenance and moderation of standards of provision and the approval and accreditation of activity providers.

- The provision of specialist guidebooks and pilots (e.g. sea cliff climbing, yacht and motorboat cruising).
- In some cases facilities and services for rescue that demand a competence greater than that of the statutory services.
- Strategic development of sites and services, competitive programmes, symposia, coaching and access.
- Attraction of specialist activity visitors to the country through reputation, personal contact and demonstrated excellence rather than promotion.

3.34 Marine activity tourism depends to some extent on the activities of a range of national and local voluntary sports bodies. National sports bodies are responsible for setting standards, supporting local clubs and dealing with issues that affect the activities, such as equipment safety and development, coaching, legislation, standards, codes of practice etc. Some of the bodies are listed below, with an additional complexity added by the Loughs Agency's remit within two jurisdictions:

- Irish Sailing Association/Royal Yachting Association + local clubs
- Irish Canoe Union/Canoe Association for Northern Ireland/British Canoe Union + local clubs
- British Sub Aqua Club/Irish Underwater Council/Professional Association of Dive Instructors (PADI) + local clubs
- Irish Amateur Rowing Union/Irish Coastal Rowing Federation + local clubs
- Irish Federation of Sea Anglers

3.35 Added to this set of bodies are a number of organisations with a remit for aspects of marine tourism and leisure or a potential influence on it, including:

- The Marine and Coastguard Agency
- The Irish Coastguard
- The Department of Culture Arts and Leisure
- Countryside Access and Activities Network
- The port authorities at Derry and Warrenpoint
- Environment and Heritage Service (water quality and marine habitat/wildlife conservation)
- Environmental Protection Agency (water quality)
- Department of the Environment – National parks and wildlife (marine conservation)
- Rivers Agency (flood defence and drainage functions)

THE LOCAL AREA CONTEXT

3.36 **Louth Council and Newry and Mourne Council** have a range of policies that place strong emphasis on the development of tourism in their areas including events, festivals and infrastructure with a marine leisure and tourism purpose. Examples include maintaining seaside car parks, quays, bringing forward the Greencastle/Greenore Ferry proposal, developing marina proposals, providing pontoons, beach management and wardening and information about water sports activities.

3.37 **County Donegal** has its own framework document for Marine and Inland Waters (developed jointly with Northern Regional Fisheries Board, and the Marine Institute as a pilot and model for other areas) which includes a vision, objectives and the following actions that are considered of most relevance to this assignment (i.e. excluding angling):

- To develop a strategy for the renewal of traditional seaside resorts and to develop new associated products;
- To provide improved interpretation on the history and marine heritage of the area;
- To provide extensive access to high quality day hire and tuition for activities such as surfing, sailing, windsurfing and body boarding at key locations;
- To develop coastal and river walking opportunities;
- To develop appropriate infrastructure for dive boats and activity operators at key sites;
- To increase the provision of packaged holiday breaks;
- To develop multi-use toilet, changing and shower complexes at key locations;
- To develop a range of controls over jet skis (including codes and guidance notes);
- To co-ordinate preparation of promotional material (e.g. activity sites, services, tuition, accommodation, good environmental practice, zoning);
- To provide codes of practice for activity users to protect designated and sensitive areas;

- To use a range of statutory and management measures to protect the coastal zone;
- To adopt measures/actions to maintain and enhance water quality;
- To produce and disseminate environmental guides for activity operators and participants;
- To develop a joint approach to promoting marine and inland waters leisure in Donegal;
- To improve the leisure potential of the Donegal quays, harbours and slipways and provide new infrastructure where required;
- To establish managed use of quays;
- To maintain and improve toilets and visual attractiveness of marine leisure areas;
- To develop and implement training programmes specifically for current and potential activity holiday operators;
- To provide business development assistance to activity holiday operators; and
- To monitor marine leisure in Donegal.

All of these actions need to be taken into account in the development strategy for the whole of the Foyle area. Indeed, to a large extent they should be regarded as applicable to the whole cross-border area.

- 3.38 **Donegal Tourism**, part of Donegal County Council's Community and Enterprise unit, has responsibility both for product development and tourism marketing in the County. It has brought forward a tourism strategy for the county. **Inishowen Tourism Ltd**, a non-profit community co-operative with 400 shareholders, represents Inishowen within Donegal Tourism, and has taken on the establishment of Inishowen as a tourism destination, including joint promotion initiatives and a tourism development role. The organisation has produced a tourist map of the area highlighting attractions, activities and accommodation and maintains Tourist Information Centres at Carndonagh and Malin Head. Inishowen Tourism provides a website www.visitinishowen.com. The organisation works closely with **Inishowen Rural**

Development Ltd the LEADER company for the area. IRDLhas cross-border tourism promotion and development links covering the whole Foyle discussed in paragraph 3.14

- 3.39 **Derry City Council (through Derry Visitor and Convention Bureau)** is concentrating on the development and promotion of city breaks. In addition, via Cruise North West, it is successfully building up cruise ship visits to the area. Its main involvement in marine tourism at present is in cruise ships, events (e.g. Port in the City and the Foyle Regatta) and in promoting the use of the Foyle Pontoon.
- 3.40 **Limavady Council** has strong commitment to the sustainable management of the Benone area as a major marine tourism and leisure destination within the Foyle area. It is also committed, through its Corporate Plan, to promotion of the natural and heritage resources of its area for the development of niche tourism. Limavady is also a key player in marine tourism as joint operator (with Donegal CC) of the Foyle Ferry.

Countryside Recreation Strategies and Natural Resource Rural Tourism Strategies

- 3.41 Five areas of Northern Ireland developed natural resource rural tourism strategies and associated countryside recreation strategies as a development and adjustment mechanism under the Programme for Peace and Reconciliation. (Peace II).
- 3.42 All five strategies (Sperrins, Fermanagh, Causeway Coast and Glens, South Armagh and Mourne) placed a strong emphasis on the development of a wider range of water sports activity and the range of services which can turn these activities into a visitor and tourism product.
- 3.43 The Loughs Agency area is affected by four of the five strategies (all except Fermanagh)
- 3.44 Key activities proposed for support within the accompanying funding programmes include:
- The development of activity businesses
 - The provision of equipment hire for water sports
 - The provision of good local information for activity participants
 - Promotion of the areas as activity venues
 - Provision of focal points and changing facilities
 - Provision of information about weather tides and conditions at busy activity venues.
 - The development of additional opportunities for waterside walking.

SUMMARY OF CONTEXT REVIEW

- 3.45 It is clear from this overview that the issue of planning for marine tourism in the two areas is a complex one, not least because of the number of bodies involved but also because there are different jurisdictions on either side of the border (e.g. different legislation governing craft used for leisure and recreation).
- 3.46 The significant role for the Loughs Agency is to overcome these difficulties and to create a unified approach to the planning and implementation of a marine tourism strategy and plan for the two areas.
- 3.47 The identification of Marine Tourism by Fáilte Ireland as a sector with significant potential is to be welcomed. An opportunity exists for Lough Foyle and Carlingford Lough to align their respective marine tourism development strategies with those of Fáilte Ireland with a view to maximizing benefits for all stakeholders.

4. MARINE TOURISM: MARKET TRENDS

4.1 World Tourism Performance

In 2005, International Tourism across the globe grew by 5.5% resulting in a total of 808 million tourist arrivals. This second successive year of growth clearly demonstrates the very robust nature of international tourism and the industry's ability to recover from calamitous events (i.e. 9/11; Asian Tsunami).

Table 4.1 below sets out a five year time series for international tourist arrivals by region.

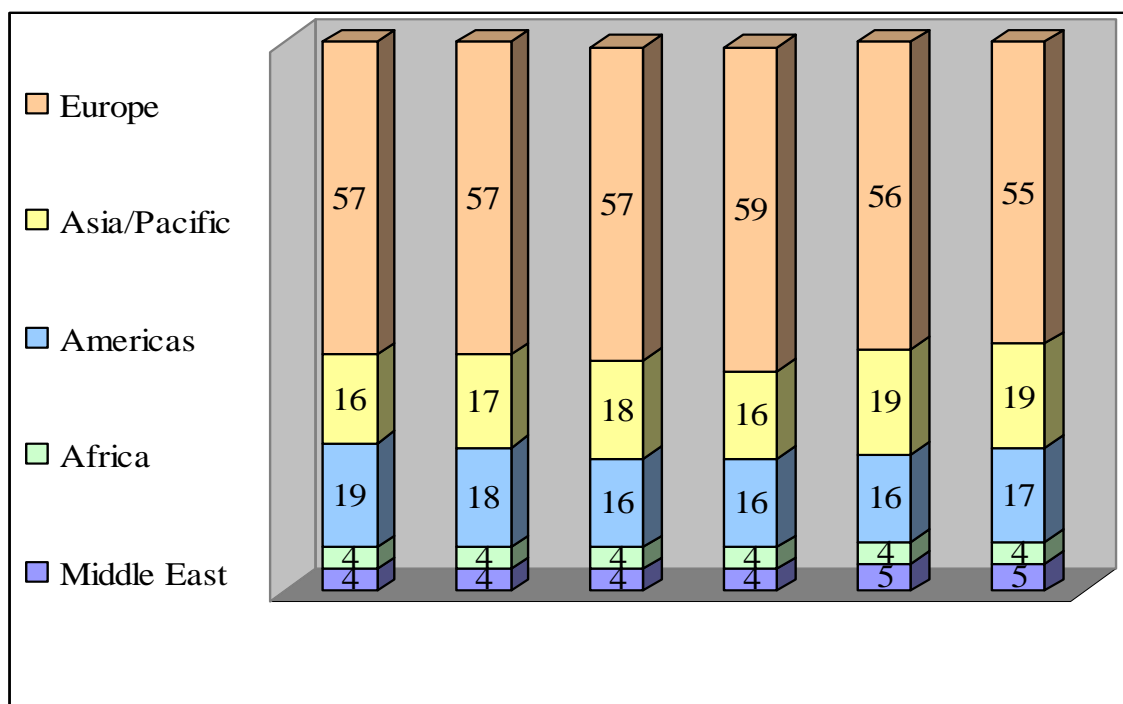
Table 4.1 - International Tourist Arrivals (millions)

	Full Year						Average
	2000	2001	2002	2003	2004	2005*	2000-2005* Change (%)
World	689	688	709	697	766	808	3.2
Europe	396	395	407	408	425	444	2.3
Asia and the Pacific	111	116	126	114	145	156	7.0
Americas	128	122	116	113	125	133	0.8
<i>North America</i>	91	86	83	77	86	89	-0.5
Africa	28	28	29	30	33	36	5.4
Middle East	25	25	29	30	35	38	8.8

*Source: U.N.W.T.O.

Europe is the world's most important region in terms of the overall volume of international tourist arrivals. In 2005, Europe attracted 444 million international tourist arrivals thus achieving a 55% share of global business (when measured in trips). By comparison, North America attracted 89 million international tourist arrivals in 2005 resulting in an 11% share of world trips.

Over the 5 year period 2000-2005, world tourism has grown by an average of 3.2% per annum with the Asia and the Pacific region (7%), Middle East (9%) and Africa (5%) recording above average growth during this timeframe. North America is the only region to have recorded a decline in arrivals over the 5 year period.

Table 4. 2 - International Tourist Arrivals: Regional Shares

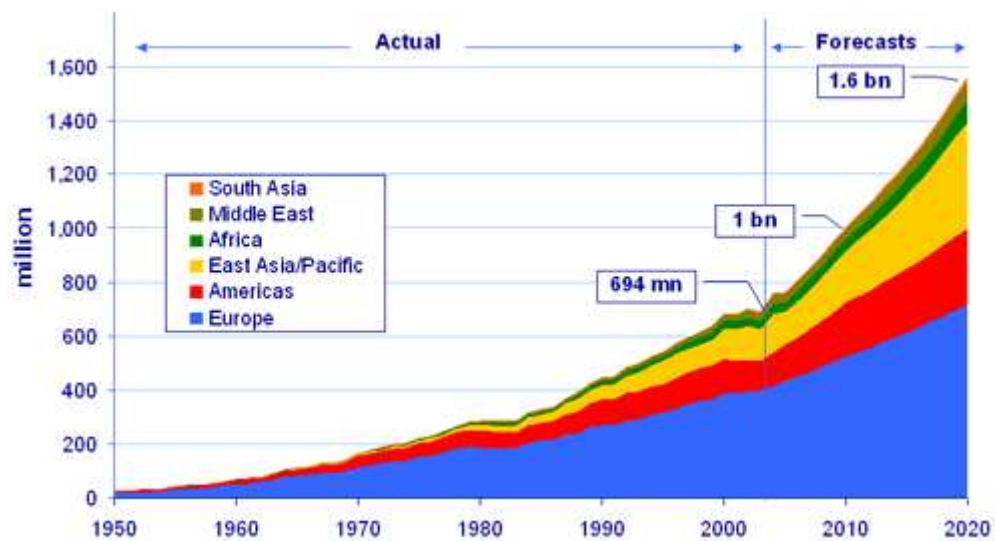
*Source: U.N.W.T.O.

Over the five year timeframe in question, regional shares of international tourist arrivals have remained relatively stable with the most significant gains being recorded by the Asia/ Pacific region.

The pre-eminent position of Europe as the world's most important region in terms of international tourism trips can be explained by the fact that the continent features 6 of the top ten tourism destinations including France and Spain, the world's two most popular destinations. The United States, followed by China are the third and fourth ranked in terms of international tourism arrivals.

Although the evolution of tourism in the last few years has been irregular, UNWTO maintains its long-term forecast for the moment. The underlying structural trends of the forecast are believed not to have significantly changed. Experience shows that in the short term, periods of faster growth (1995, 1996, 2000) alternate with periods of slow growth (2001 to 2003). While the pace of growth till 2000 actually exceeded the *Tourism 2020 Vision* forecast, it is generally expected that the current slowdown will be compensated in the medium to long term.

Table 4.3. World Tourism Forecast (1)



* Source: Tourism Ireland

UNWTO's *Tourism 2020 Vision* forecasts that international arrivals are expected to reach nearly 1.6 billion by the year 2020. Of these worldwide arrivals in 2020, 1.2 billion will be intraregional and 378 million will be long-haul travelers.

The total tourist arrivals by region shows that by 2020 the top three receiving regions will be Europe (717 million tourists), East Asia and the Pacific (397 million) and the Americas (282 million), followed by Africa, the Middle East and South Asia.

East Asia and the Pacific, Asia, the Middle East and Africa are forecasted to record growth at rates of over 5% year, compared to the world average of 4.1%. The more mature regions Europe and Americas are anticipated to show lower than average growth rates. Europe will maintain the highest share of world arrivals, although there will be a decline from 60 per cent in 1995 to 46 per cent in 2020.

Table 4.4 World Tourism Forecast (2)

	Base Year	Forecasts		Market share (%)		Average annual growth rate (%)
	1995	2010	2020	1995	2020	1995-2020
	(Million)					
World	565	1006	1561	100	100	4.1
Africa	20	47	77	3.6	5.0	5.5
Americas	110	190	282	19.3	18.1	3.8
East Asia and the Pacific	81	195	397	14.4	25.4	6.5
Europe	336	527	717	59.8	45.9	3.1
Middle East	14	36	69	2.2	4.4	6.7
South Asia	4	11	19	0.7	1.2	6.2

* Source: Tourism Ireland

Long – haul travel worldwide will grow faster, at 5.4 per cent per year over the period 1995 – 2020, than international travel, at 3.8 per cent. Consequently the ratio between international and long – haul travel will shift from around 82: 18 in 1995 to close to 76: 24 in 2020.

GENERAL LEISURE AND TOURISM TRENDS

4.2 For the immediate and longer-term future, the main influences on leisure and tourism activity in the UK, Ireland, Western Europe and in some places further afield will be:

- The ageing population, with the over 55s as the fastest growing age group
- The growth in the number of people leading healthier and active lifestyles
- The erosion of the nuclear family (fewer children, more independent adults and group activities)
- Global warming and the continued unpredictability of the weather (resulting in more need for shelter)

- The growth of environmental awareness and interest in conservation, with eco-tourism the fastest growing segment of tourism (e.g. bird watching, sea life trips, voluntary conservation work)
- The growth in cash rich/time poor members of society, seeking a wide range of experiences that are special treats (eg. luxury holidays) or alternatives to their daily lives including relaxing, cultural, physical, alternative, adventurous, individual, self-fulfilling, achievement-making and spiritual activities (depending on age-group, taste and day-to-day lifestyle)
- The increase in technological competence and familiarity with electronic technology
- The rise in demand for short breaks and special interest/activity holidays (as we take more holidays per year)
- Concerns over safety due to the threat of international terrorism
- Growing numbers of globe trotting youths and refusing-to-age “baby boomers”
- Our tendency to become more discerning about choice and quality in the pursuit of our leisure and tourism activities.

4.3 Some of the implications are that there is likely to be increasing demand for tourism that involves:

- Low-key forms of exercise (e.g. recreational walking, cycling, canoeing)
- Other forms of health-giving experiences and facilities
- Single person, adult couple and group activities
- Facilities offering respite from inclement weather
- Opportunities to appreciate nature, culture, heritage and conservation
- Relaxing activities (e.g. boating, angling), self-fulfilment experiences (e.g. long distance walking, learning new skills or adventure boating)
- Short-breaks (e.g. opportunities for overnight stays, including city breaks and cruises for a few days)

- Luxury cruises
- Opportunities to pursue special interests or activities (including multi-activity breaks)
- Packaged breaks (including coach tours)
- Independent traveller breaks (with travellers becoming increasingly familiar with deals available from low cost airlines)
- Internet and last-minute holiday planning and booking
- Off-season holiday breaks
- A shift towards destinations that are more familiar and those accessible by land as a result of concerns over safety, global economic slowdown, and the introduction of the euro.
- A range and quality of facilities and services that at least match what people experience elsewhere

TOURISM TO IRELAND

- 4.4 Tourism Ireland was established as one of six areas of co-operation under the framework of the Belfast Agreement for the purpose of marketing the entire Island of Ireland as an international tourism destination.

The island of Ireland has experienced a steady growth in overseas visitors. Since 2001 the island has attracted an additional 1.1 million visitors.

The biggest driver for growth in 2005 was Mainland Europe, showing 21% increase on 2004. It now account for almost a quarter of all visitors to the island, compared with a fifth five years ago. There was a strong growth across all major European source markets, notably from Germany (+34%), the Nordic countries (+23%) and Spain (+10%).

There has be no change in North America visitors since 2004, with only the Other Areas showing a decrease in 2005, in contrast to a year of huge growth from this market area (+24%) in 2004.

Table 4.5 Overseas Visitors Numbers to Ireland

Overseas Visitors Numbers 2001 – 2005 (000s)						
	2001	2002	2003	2004	2005	05/04
Great Britain	4,306	4,523	4,762	4,761	4,810	+1%
Mainland Europe	1,413	1,452	1,544	1,648	1,991	+21%
Germany	302	304	314	312	417	+34%
France	288	309	331	309	320	+4%
Italy	162	161	181	191	196	+3%
Spain	106	119	138	162	178	+10%
Netherlands	198	177	157	160	169	+5%
Nordic Countries*	137	114	129	134	166	+23%
North America	955	879	919	994	993	0%
USA	866	785	831	892	890	0%
Canada	88	94	88	103	102	0%
Other Areas	291	273	276	342	319	-7%
Australia/New Zealand	147	128	122	159	154	-3%
Total Overseas	6,964	7,127	7,501	7,746	8,114	+4.8%

*Nordic Countries include Sweden, Denmark, Norway, Finland, Iceland

Source: Tourism Ireland

Tourism Ireland focuses its overseas activities on those customers who can be most strongly influenced by marketing and promotion. These 'promotable' visitors are made up mostly of **holidaymaker (94%)** but also include visitors attending a **conference or incentive event** and those who come to learn **English as a Foreign Language (EFL)**.

In total, 226,000 conference/incentive and EFL visitors came to the island of Ireland in 2005, an increase of 37% on the 164,000 in 2004.

Table 4.6 Holidaymaker Number

Holidaymaker Numbers All Island 2001 – 2005 (000s)						
<i>h o l i d a y</i>	2001	2002	2003	2004	2005	05/04
Great Britain	1,675	1,810	1,837	1,787	1,726	-3%
Mainland Europe	755	762	777	830	958	+15%
North America	632	584	619	664	624	-6%
Other Areas	150	135	128	173	148	-14%
Total Overseas	3,212	3,292	3,361	3,454	3,455	0%

In total 226,000 Conference/Incentive and EFL visitors came to the island of Ireland in 2005

* Source: Tourism Ireland

Table 4.7 Promotable Visitor Number

Promotable Visitor Numbers All Island 2001 – 2005 (000s)						
	2001	2002	2003	2004	2005	05/04
Great Britain	1,721	1,845	1,871	1,824	1,782	-2%
Mainland Europe	843	854	919	935	1,102	+18%
Germany	199	203	200	192	270	+40%
France	171	170	189	171	167	-3%
Nordic Countries	82	72	81	99	142	+43%
Italy	120	112	132	123	128	+4%
Netherlands	112	92	85	85	98	+16%
Spain	60	67	78	86	93	+8%
North America	641	592	625	675	637	-6%
USA	602	537	576	621	583	-6%
Canada	38	54	48	54	54	0%
Other Areas	157	145	140	184	161	-13%
Australia/New Zealand	101	82	81	107	105	-2%
Total Overseas	3,363	3,437	3,554	3,617	3,681	1.8%

* Source: Tourism Ireland

- 4.5 Great Britain is Ireland's most important source market for holiday visitors, accounting for 52% of the total. The island also attracts significant holiday business from Mainland Europe (23% of total) and North America (20%). Following the terrorist attacks in the United States in September 2001, there has been a decline in holiday visits from North America and other long haul markets, although recent years has witnessed a recovery in North American Holiday business
- 4.6 Taking long-term tourism trend information into account, Tourism Ireland has identified a number of key markets and market segments that are considered to offer the best prospects for the island of Ireland. These are presented overleaf.
- 4.7 Tourism Ireland is currently focusing the bulk of its resources on the key markets of Great Britain, USA, Germany, France, the Netherlands, Italy, Australia, and Canada. These are marketing priorities for Ireland as a whole with no specific focus specifically for Northern Ireland tourism

TOURISM BAROMETER

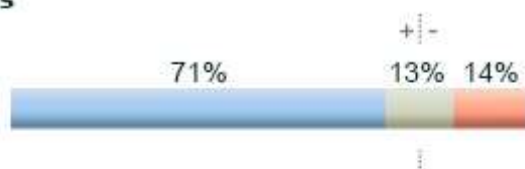
- 4.8 The Tourism Barometer is a survey of 1,317 tourism enterprises in the Republic of Ireland and Northern Ireland. The survey, carried out by Tourism Development International on behalf of Fáilte Ireland and the N.I.T.B. has been designed to obtain an insight into the performance of the industry in 2006 compared to last year. Prospects for 2007 are also examined.

REPUBLIC OF IRELAND

49. The findings from the latest instalment of the Tourism Barometer for the Republic of Ireland provide clear evidence that the last few months of 2006 have contributed to a buoyant performance for most accommodation sectors. Once again, the strongest performance has been recorded in respect of hotels. Consistent with the findings from earlier waves of the Tourism Barometer, hostel and caravan and camping establishments also cite an improved performance compared to last year. On balance, guesthouse owners reporting an improvement in fortunes this year outnumber those whose business has declined by a factor of two to one. Where B&B and self-catering establishments are concerned, the overall volume of bednights is reported to be in line with 2005
- 4.10 Compared to September of this year, with the exception of the self-catering sector, proprietors in all categories of accommodation report a more buoyant situation overall.

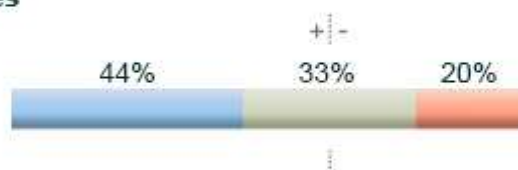
Table 4.8 Republic of Ireland
Year on year Performance
2006 vs 2005

Hotels



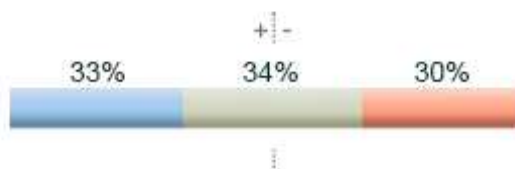
No reply 2%

Guesthouses



No reply 3%

B&Bs



No reply 2%

Self Catering



No reply 1%

Caravan & Camping



Hostels



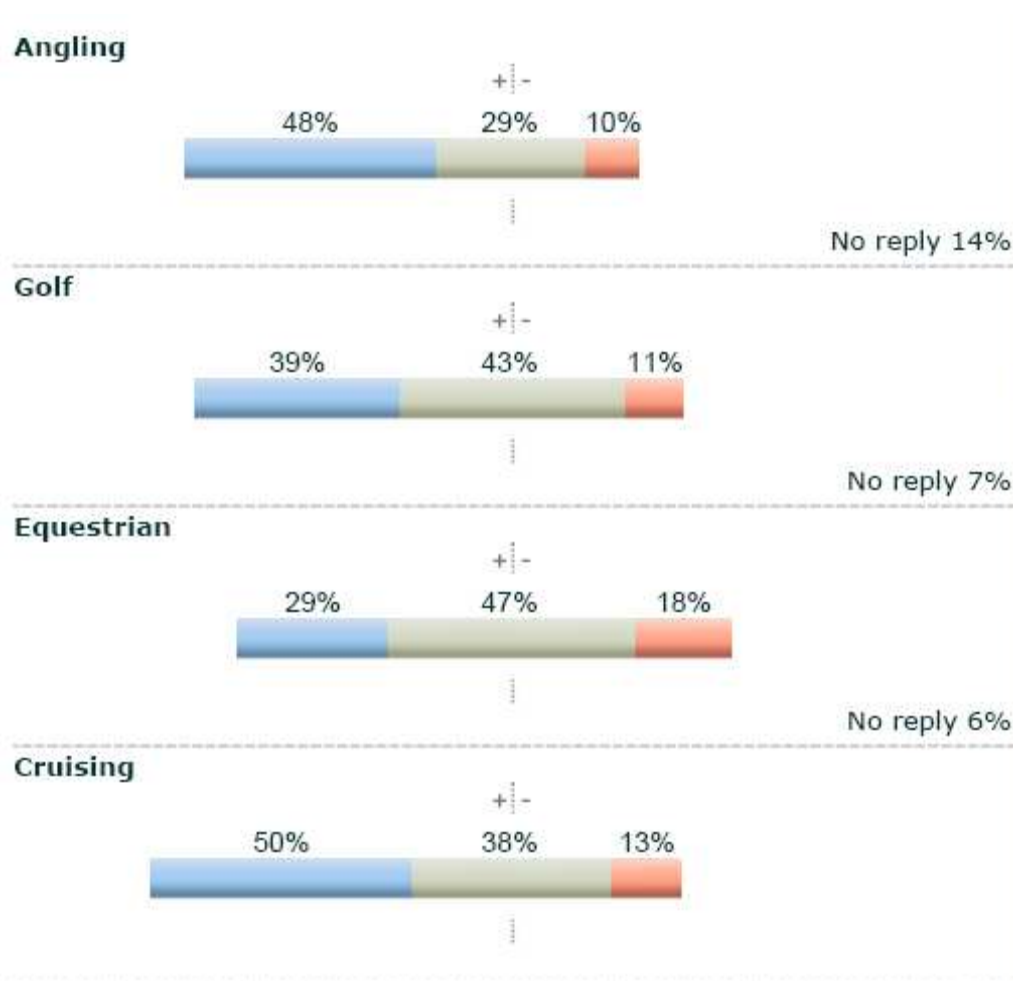
No reply 2%

* Source: Fáilte Ireland – Barometer 2006

- 4.11 Given the positive overall performance over the current year allied to encouraging prospects from the major source markets, most accommodation sectors are optimistic regarding the prospects for 2007. Not surprisingly, hotel and hostel managers express the highest degree of optimism where overseas prospects are concerned. Guesthouse and caravan and camping establishment owners are also optimistic regarding the prospects for overseas business in 2007 as are B&B and self-catering owners.

In a similar vein, notwithstanding the softening in demand experienced this year, activity product providers are, on balance, optimistic and expect growth in overseas bookings in 2007

**Table 4.9: Republic of Ireland
For 2007
Activities
Leisure/Holiday Business**



* Source: Fáilte Ireland – Barometer 2006

NORTHERN IRELAND

- 4.12 Consistent with findings presented in earlier instalments of the Tourism Barometer, the evidence suggests that for most accommodation enterprises in Northern Ireland 2006 has witnessed an increase in the overall volume of bednights compared to 2005. Tourism enterprises are even more positive than they were at the corresponding stage last season.

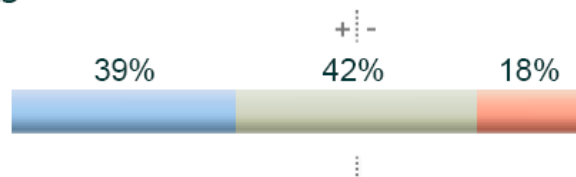
Most hoteliers report business to be up on last year. On balance, the fortunes of the guesthouse and self-catering sectors have also improved this year compared to last as have those of B&B operators, albeit not to the same extent. A majority of caravan and camping and hostel owners have also experienced business growth

Table 4.10: Overall Bednights Accommodation –Northern Ireland
Year on year Performance
2006 vs 2005

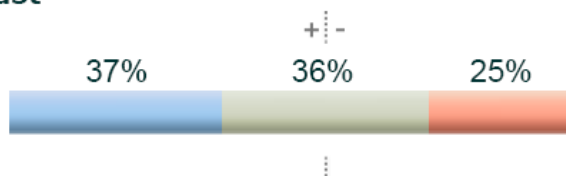
Hotels



Guesthouses

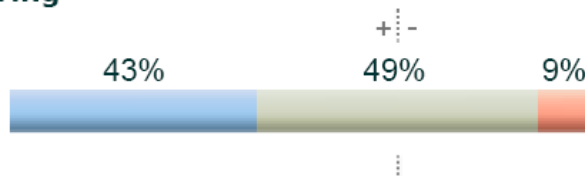


Bed & Breakfast

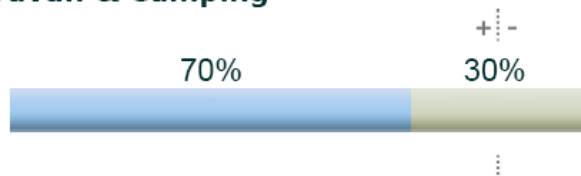


No reply 2%

Self Catering



Caravan & Camping



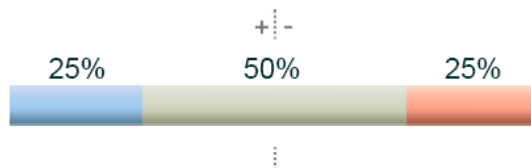
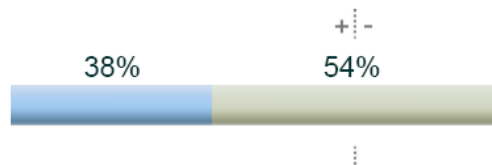
Hostels



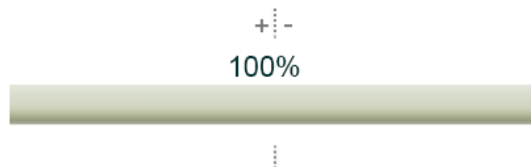
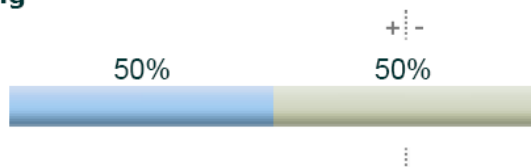
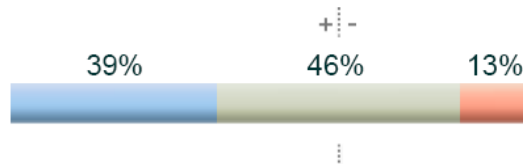
* Source: Fáilte Ireland – Barometer 2006

- 4.13 Given the buoyant performance in 2006, allied to encouraging market conditions, it is hardly surprising that accommodation proprietors are optimistic regarding the prospects for overseas [including Great Britain] business in 2007. In particular, a majority of hoteliers forecast growth in overseas demand next year.

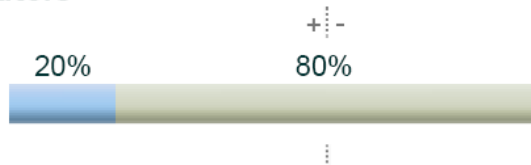
Where activity product providers are concerned, golf clubs, cruising companies and cycling/walking operators are optimistic and expect growth in overseas [including Great Britain] demand in 2007. Angling and equestrian establishments are more cautious, but nevertheless expect overseas business next year to be in line with that recorded in 2006

Table 4.11: Overseas (including Great Britain) Business Forecast – Northern Ireland**Angling****Golf**

No reply 8%

Equestrian**Cruising****Cycling & Walking****Attractions**

No reply 2%

Coach Operators

* Source: Fáilte Ireland – Barometer 2006

REGIONS VISITED BY INTERNATIONAL TOURISTS

- 4.14 International tourism has not been evenly distributed throughout the island of Ireland. Dublin, with over 3.9 million visitors, enjoys by far the largest share of visitors and revenue.
- 4.15 The figures below show that the three regions most associated with the Lough Foyle and Carlingford Lough Areas (Northern Ireland, Midlands East and North West) attracted 3 million international visitors, which is 37% of the total. However, their share of total revenue was only 24%.

Table: 4. 12 International Visitors - Regions Visited

Areas Visited – Overseas Visitors					
	Visitors (000s)	Share %	Revenue €m	Revenue £m	Revenue %
Dublin	3,937	49%	1,282	859	32%
Northern Ireland	1,700	21%	488	327	12%
South West	1,717	21%	733	491	18%
West	1,235	15%	441	296	11%
Shannon	1,002	12%	293	197	7%
South East	943	12%	252	169	6%
Midlands East	843	10%	295	198	7%
North West	489	6%	190	127	5%

* Source: Tourism Ireland

Tourism in the Foyle and Carlingford Catchments

Foyle Catchment

- 4.16 Using local authority estimates for Northern Ireland (NITB) in respect of Derry and Limavady, and estimates of tourism activity for Donegal from Fáilte Ireland regional analysis, it is possible to prepare a broad based estimate of out of state tourism for the Foyle catchments.
- 4.17 Taking all three local authority areas into account, it can be estimated that the Foyle catchment attracted an estimated 298,000 visitors in 2002, spending an estimated £ 76.4million (€112 million)

Table 4.13 Foyle Catchment (Marine Area)^o - Out Of State Tourism Numbers and Revenues (2005)

	Tourists	Revenue £ Million	Revenue € Million
• Donegal	171,000	47.6	70
• Limavady	26,000	5.8	8.5
• Derry	101,000	23	33.7
Total	298,000	76.4	112.2

* Source: Fáilte Ireland/Northern Ireland Tourist Board (Donegal excludes visitors from N.I.)

^o Excludes Strabane and Omagh

4.18 In 2002, the Foyle catchment attracted a 3.7% share of out of state tourists to Ireland and a 2.8% share of revenue.

Carlingford Catchment

4.19 Combining estimates of tourism activity for Louth and Newry and Mourne, it can be estimated that the Carlingford catchment attracted 143,000 visitors in 2005, spending an estimated £ 30.1 million (45 million)

Table 4.14 Carlingford Catchment - Out Of State Tourism Numbers and Revenues (2005)

	Tourists	Revenue £ Million	Revenue € Million
• Louth	92,000	19.07	28
• Newry and Mourne	51,000	11.6	17
Total	143,000	30.67	45

* Source: Fáilte Ireland/Northern Ireland Tourist Board (Louth excludes visitors from N.I.)

4.20 In 2002, the Carlingford catchment attracted a 1.8% share of out of state tourists and 1.1% share of revenue.

OVERSEAS VISITOR PARTICIPATION IN MARINE TOURISM AND LEISURE

NOTE:

An issue in preparation this report is the lack of reliable data relating to the participation in Marine Tourism and Leisure. This was the case for the preparation of the original draft in January 2005. In the intervening two years, there has been no improvement in the situation.

In the Republic of Ireland in 2002 was the last year in which Fáilte Ireland (formerly Bord Fáilte) collected visitors number and expenditure estimates for overseas visitors population specific marine Tourism activities. In a similar vein, N.I. T. B. currently does not have information on these particular market segments.

Where domestic participation is concerned, the most up- to- date source of information is the National Survey of Water - based Activities carried out of the behalf of the marine Institute by the E. S. R. I

Where appropriate, the consultants have referred to information from this report in the compilation of this document.

Republic of Ireland

- 4.21 With the exception of the general water sports category, which has made some recovery since the start of the decade, **overseas visitor participation in most marine tourism activities counted by Fáilte Ireland has declined in recent years.** The table below shows the number of participants overall and specialists for each activity from 1997 to 2002, the last year in which Fáilte Ireland produced estimates for each activity.

Table 4.15 Overseas Visitor Participation in Marine Tourism Activities

	1997	1998	1999	2000	2001	2002
Angling						
Visitors	155,000	139,000	128,000	123,000	116,000	87,000
Revenue (£m)	75	62	51	48	54	43
Revenue (€m)						55.1
Angling-Specialists**						
Specialist	88,000	78,000	78,000	87,000	87,000	63,000
Revenue £	52	46	30	35	na	na
Revenue (€m)						
Sailing						
Visitors	39,000	31,000	22,000	17,000	22,000	23,000
Revenue £	na	na	na	na	na	
Revenue (€m)						12.1*
Sailing- Specialists**						
Specialists	13,000	11,000	10,000	12,000	14,000	
Revenue £	na	na	na	na	na	
Cabin cruising						
Visitors	19,000	20,000	17,000	18,000	15,000	14,000
Revenue £	na	na	na	na	na	
Revenue (€m)						7.3*
Water sports						
Visitors		40,000	na	na	29,000	36,000
Revenue £		na	na	na	na	
Revenue (€m)						18.9*
Water sports- Specialists**						
Specialists		14,000	na	na	12,000	
Revenue £		na	na	na	na	
Revenue (€m)						
Total Water-based Activities 2002						
Visitors						160,000
Revenue (€m)						93.4
* based on CSO Average Estimate of Overseas Visitor Spend per Head €526 (Fáilte Ireland's Angling Spend per Head is higher at €633)						
** Specialists are a sub group within the overall Activity						

Note: As the data above are derived from an exit survey conducted at major ports of departure, the number of sailing specialists (who sail directly to the island) is likely to be underestimated.

4.22 Fáilte Ireland do have an overall estimate for participation in total water- based activities in 2005. This indicates an overall decline from 160,000 visitors in 2002 to 90,000 in 2005

4.23 Thus, in contrast to the major growth that has taken place in international tourism in general to Ireland, there is clear evidence that the marine tourism sector has underperformed.

VISITOR PROFILE/ CHARACTERISTICS

Sailing

- 4.24 The main characteristics of visitors to Ireland who participate in **sailing** activities are:
- A majority visit for the purpose of taking a holiday
 - The main markets are Britain and Mainland Europe which account for approximately one half and one third of visitors respectively
 - An estimated six in ten sailing visitors visit during the two peak months of July and August.
 - In terms of party composition, almost two thirds travel alone or as part of a couple.
 - In demographic terms, while all age groups are represented amongst visiting sailors to Ireland, where social class is concerned, sailing appears to be confined to predominantly to people from professional and white-collar backgrounds.
 - Almost half had not used a car during their trip and were therefore reliant on public transport or other forms of transport.
 - In terms of value for money, the majority describe the Irish sailing product as being **no better than fair**.

Other Water-Based Activities

- 4.25 The main characteristics of visitors to Ireland who participate in **other water-based activities** are:
- A majority visit for the purpose of taking a holiday although a substantial minority combine the activity when visiting friends or relatives.
 - Mainland Europe is the most important market, accounting for over half of all participants. Britain is the second most important overseas market.
 - Other water-based activities achieve a better seasonal spread than sailing. While July and August are the peak months in terms of demand, there are high levels of participation from May through September.

- Other water-based activities attract visitors with a younger age profile than sailing; a majority are under thirty-four years.
- Although a majority of participants are from professional/white collar backgrounds, there is evidence that other water-based activities have a wider appeal than sailing in terms of social class.
- Half of all participants travelled alone while a similar proportion did so without the use of a car.
- As with sailing, a majority of participants rated the product as **no better than fair** in terms of value for money.

Northern Ireland

- 4.26 Information on visitor participation in marine tourism activities in Northern Ireland is scarce. Although game, coarse and sea angling participation is measured annually, the NITB do no record other water-based/marine tourism participation. The latter are included in a broader category based on all special interest sports activities. Participation rates for each of the last three years are shown below.

Table 4.16 Participation in special interest sports activities by visitors to Northern Ireland

	2001	2002	2003
• Special Interest Sports	23,500	22,000	23,400
• Sea Fishing	3,600	3,800	4,100
• Game Fishing	3,500	2,900	3,100
• Coarse Fishing	4,800	4,300	3,900

* Source: Northern Ireland Tourist Board

- 4.27 While tourism in general has grown in Northern Ireland, there is no evidence of growth in demand for special interests sports activities. It is therefore fair to assume that participation in marine tourism activities (either at a specialist or non-specialist level) over this timeframe has also remained static.

DOMESTIC PARTICIPATION IN MARINE BASED LEISURE ACTIVITY

Republic of Ireland

4.28 In terms of domestic participation, the table below clearly demonstrates that most marine - based leisure activity is of general as opposed to specific nature. 45% of expenditure was accounted for by trips to the beach/seaside, while swimming at the sea accounted for a further 19% of expenditure.

Table 4.15 Expenditure on Marine Based Leisure Activities (Republic of Ireland)

	A	B	C	D	
Activity	Equipment Euro Ms	Daytrip Euros Ms	Overnight Euros Ms	Total	%
Freshwater Angling for Coarse Fish	6.4	2.1	2.7	11.2	2.6%
Freshwater Angling for Game Fish	9.6	7.6	4.9	22.1	5.1%
Sea Angling from the shore	7.2	4.5	2.2	14.0	3.2%
Sea Angling from boat	4.6	5.8	1.3	11.6	2.7%
Sailing	9.4	3.1	12.3	24.7	5.7%
Boating in the sea in Row boats, canoes etc	0.6	0.6	2.8	4.1	0.9%
Boating in power boats etc in the sea	0.7	1.4	2.0	4.0	0.9%
Cruising, Boating on Inland Waterways	4.2	6.3	6.4	16.9	3.9%
Swimming in the Sea	5.1	15.5	62.9	83.5	19.3%
Water Skiing, Jet Skiing	13.2	4.5	0.1	17.8	4.1%
Surfing, Sail boarding	1.1	1.5	4.6	7.2	1.7%
Scuba Diving, Snorkelling	4.9	1.0	3.5	9.4	2.2%
Other Sea Sports	0.3	0.5	0.1	0.8	0.2%
Whale/Dolphin Watching	0.6	0.2	0.8	1.6	0.4%
Bird Watching in Coastal areas	0.0	0.1	0.8	0.9	0.2%
Visiting Nature Reserves etc. in Coastal Areas	0.7	1.7	1.7	4.0	0.9%
Other trips to the beach or seaside	11.5	66.0	116.2	193.7	44.7%
Other trips to the islands	0.9	1.5	3.4	5.8	1.3%
Total	80.8	123.8	228.7	433.3	100.0%

* Source: E.S.R.I.

4.28 As shown in the table below, most domestic participation in marine based leisure activity takes place in the southern and eastern regions.

Table 4.16 Regional Breakdown of Expenditure on Marine Based Leisure Activities (Republic of Ireland)

Activity	Euro Millions			Per cent	
	BMW	South&East	Total	BMW	South&East
Freshwater Angling for Coarse Fish	1.5	1.1	2.7	57.4	42.6
Freshwater Angling for Game Fish	3.7	1.2	4.9	76.1	23.9
Sea Angling from the shore	1.3	1.0	2.2	57.0	43.0
Sea Angling from boat	0.8	0.4	1.3	67.0	33.0
Sailing	1.6	10.6	12.3	13.1	86.9
Boating in the sea in row boats, canoes etc	1.8	1.1	2.8	62.7	37.3
Boating in power boats etc in the sea	0.5	1.4	2.0	26.3	73.7
Cruising, Boating on Inland Waterways	5.9	0.5	6.4	92.6	7.4
Swimming in the Sea	12.1	50.7	62.9	19.3	80.7
Water Skiing, Jet Skiing	0.1	0.0	0.1	100.0	0.0
Surfing, Sail boarding	1.8	2.8	4.6	39.6	60.4
Scuba Diving, Snorkelling	2.4	1.1	3.5	68.6	31.4
Other Sea Sports	0.1	0.0	0.1	79.1	20.9
Whale/Dolphin Watching	0.4	0.4	0.8	52.7	47.3
Bird Watching in Coastal areas	0.1	0.8	0.8	6.9	93.1
Visiting Nature Reserves etc. in Coastal Areas	0.1	1.5	1.7	7.9	92.1
Other trips to the beach or seaside	17.7	98.6	116.2	15.2	84.8
Other trips to the islands	2.0	1.4	3.4	59.3	40.7
	54.1	174.6	228.7	25.0	75.0

* Source: E.S.R.I.

Northern Ireland

4.29 Up-to-date information on domestic participation in marine based leisure activities in Northern Ireland is not readily available. However, the Northern Ireland Leisure Trips Survey in 1991, commissioned by the EHS/N.I.T.B. and Sports Council, identified that year 37 million leisure day trips (involving at least 3 hours away from home but no overnight stay) had taken place. Estimated expenditure was of the order of £303 million.

4.30 The key findings from this survey can be summarised as follows:

- 41% of all domestic leisure trips were to take part in an activity. 12% to watch an activity, 38% to visit a particular place, and 9% to visit friends and relatives.
- 58% of men made day trips and 42% of women
- 15.6% of trips involved a visit to a beach or seaside resort.

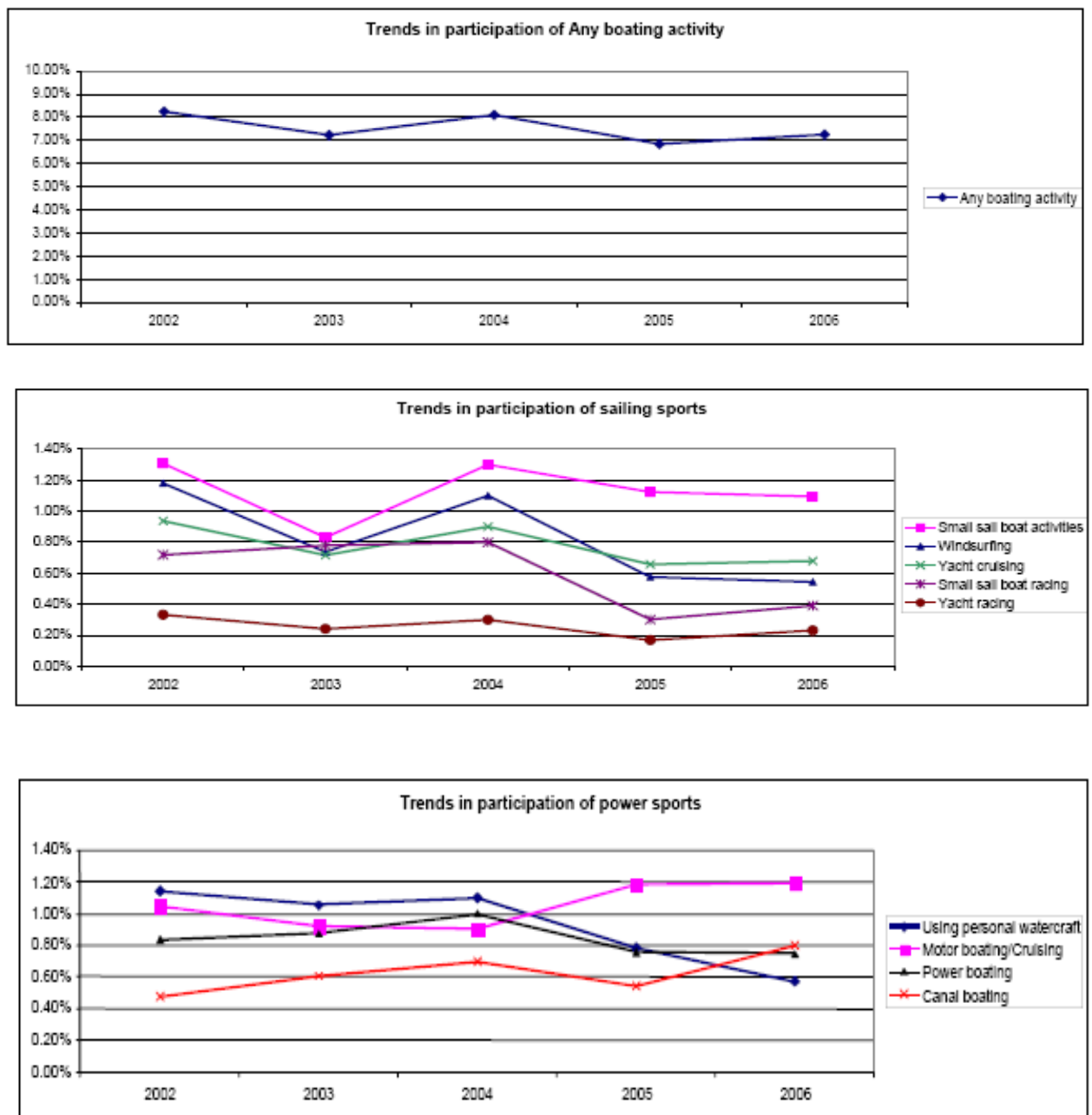
- Sporting day trips (to take part in sport) accounted for 25.3% of all trips
- Three times as many men as women made trips to take part in sports (77%/23%)
- Water-based activity participation was included in 3.9% of trips
- Average expenditure per leisure day trip was £8.27 (in 1991)
- Average expenditure for water-based activity trips was £30.42
- Average expenditure per trip to a beach or seaside resort was £10.38
- More than half of all trips involved short journeys of less than 20 miles. Trips for sporting purposes were more likely to fall into this category
- Visits to seaside resorts were dominated by longer journeys with nearly on third involving journeys of over 60 miles round trip.

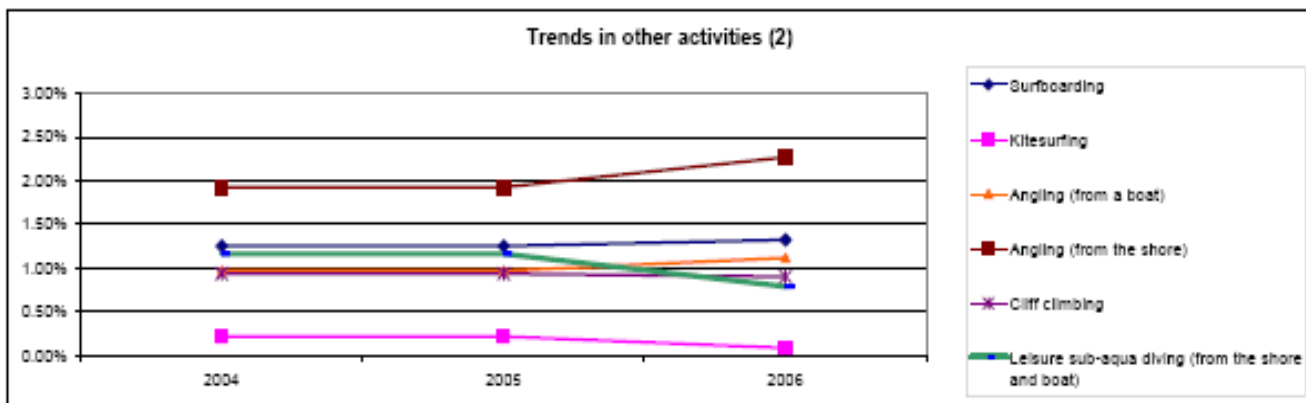
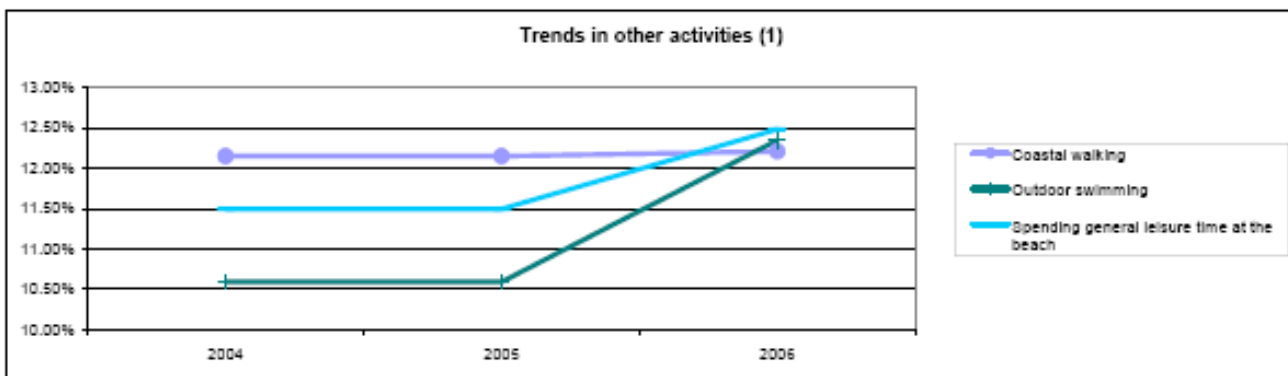
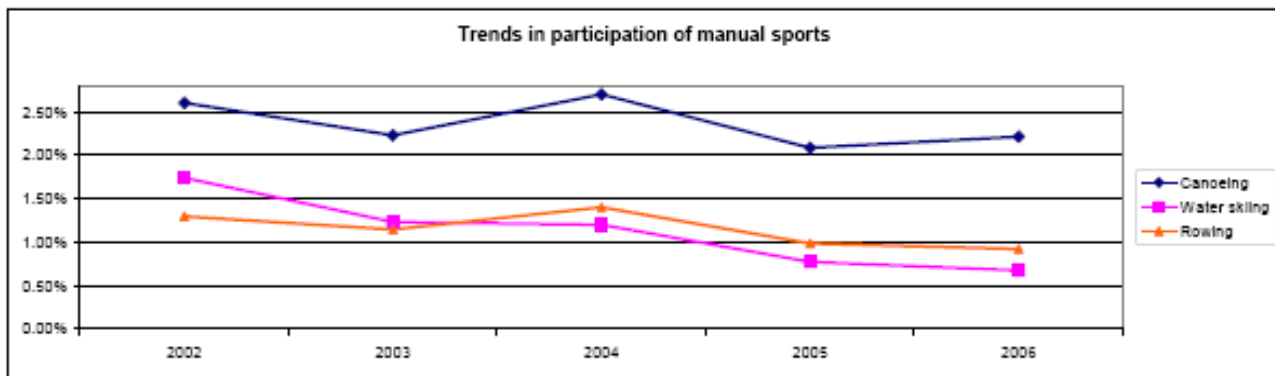
BRITAIN

- 4.31 The *Watersports and Leisure Participation Survey* carried out by Arkenford Market Modelling and research provides information on participation trends in marine tourism activities in Britain.
- 4.32 The following charts give insight into the participation trends for grouped activities from 2002 to 2006 and for ‘any boating activity’ as whole. The activities are grouped together into sailing sports (small sail boat racing, other small boat activities, yacht racing, yacht cruising and windsurfing), power sports (power boating, general motor boating, canal boating and using personal watercraft) and manual sports (canoeing, rowing and water – skiing).
- 4.33 Of the original 12 activities, 5 activities have seen a rise in participation levels in 2006, even though this rise is sometimes very small and may not be significant. The only significant changes are a decline in using personal watercraft (-0.2 %) and an increase in canal boating (+ 0.25%). The other 7 original activities have seen mostly minor declines in participation rates.
- 4.34 Of the other activities, spending general leisure time at the beach, outdoor swimming, angling from the shore and boat, surfboarding and coastal walking, have seen rise in participation levels in 2006, all but coastal walking, surfboarding and angling from boat can be demonstrated as significant.

- 4.35 There appears to be a gradual decline in windsurfing, using personal watercraft and water skiing since 2002. Motor boating/cruising and canal boating on the other hand have seen a gradual increase. Outdoor swimming and spending general leisure time at the beach both have seen an increase compared to previous years, and the increase in these activities seems to be closely related to each other. The additional sample (i.e. approx. 12, 000 vs 6,000) seems to have added greater stability to the data year on year.

Table 4.17 Trends in Watersports and Leisure Participation in 2002 to 2006





*Source: Tourism Ireland

CONCLUSION

- 4.36 In framing a strategy for marine tourism and leisure for Lough Foyle and Carlingford Lough, it is evident that the two catchments in question should be able to attract business from **four** potential sources as shown in table 4.14.

Table 4.14 Potential Sources of Demand - Marine Tourism and Leisure

INTERNATIONAL - GENERAL HOLIDAYMAKERS	DOMESTIC - GENERAL HOLIDAYMAKERS AND DAY TRIPPERS
INTERNATIONAL - SPECIAL INTEREST HOLIDAYMAKERS	DOMESTIC - SPECIAL INTEREST MARINE LEISURE PARTICIPANTS

- 4.37 A review of market trends clearly indicates that the opportunities for significant growth are more likely to be realised through a balanced approach, which targets the general holiday market through special maritime events and holiday packages/breaks, and special interest visitors through specialist activity products.
- 4.38 The low level of visitor demand for (and growth in) water-based activities by overseas visitors is perhaps not surprising given the low levels of satisfaction with the product as demonstrated through the value for money ratings (which are in stark contrast with the ratings for Irish tourism generally).
- 4.39 Investment in marine tourism facilities and infrastructure in Lough Foyle and Carlingford Lough combined with a co-ordinated marketing approach will ensure that the two catchments are well positioned to capture a share of the high growth/high volume general holiday market while at the same time catering for the particular requirements of the specialist market segments.

5. MARINE TOURISM: SOCIAL & ECONOMIC SIGNIFICANCE

- 5.1 It is estimated that almost 1.5 million adults in Ireland (49% of the population) partake in some form of water-based activity¹. Adult participation in water sports in 2003 is estimated to have contributed some €434million in expenditure and to have accounted for almost 45% of total domestic tourism revenue. The estimated value of the sector, based on the survey, is detailed below

Table 5.1 Economic Impact of Water – based Leisure Activity

Market	Participants (000's)	Revenue €M	Employment
Water based domestic market	1,475	€433.6	5,100

ESRI 2003 A national survey of water based leisure activities in Ireland – for The Marine Institute.

- 5.2 A further one person in ten say that they would take up a marine leisure activity if the facilities were available. In terms of coastal boating 68,000 indicated an intention to take up boating at sea if facilities were improved and 13,200 people who already sail at sea said that they would increase their participation if facilities were improved.
- 5.3 Compared with a baseline study in 1996 the 2003 study does not demonstrate positive growth in participation in all activities. Some activities have shown a decline, particularly swimming in the sea and other resort type activities. Sailing on the sea has however shown a significant increase as have all types of sea angling. The trend in other types of boating cannot be established from the survey due to less of a breakdown in activities being attempted in the 1996 survey. In gender terms there is fairly even participation overall between males and females. Other significant findings are that participation in all water sports is over 28% in all socio-economic groups it is highest in the professional and managerial classes at 66.5% and in families with more than one child . There is evidence in a reduction in participation in the critical 16-29 age group between 1996 and 2003

¹ ESRI 2003, A National Survey of Water-based Leisure Activities in Ireland for the Marine Institute

5. 4 Performance varies by activity between the 1996 and 2003 surveys as follows:

Table 5.2 Trend in Activity participation

Activity	2003 Total participants (000s)	1996 Total participants (000s)	TREND
ANGLING			
Freshwater angling for coarse fish	66.5	66.2	slight increase
Freshwater angling for game fish	80.5	76.4	slight increase
Sea angling from the shore	74.1	53.6	increase
Sea angling from a boat	53.0	34.3	increase
Any type of angling	218.0	190.0	
COASTAL AND INLAND BOATING			
Sailing at sea	58.8	49.9	increase
Boating and sea in row boats, canes etc	32.1	*	
Boating at sea in power boats etc	24.6	*	
Cruising or boating on inland waterways	42.8	30.1	increase
Any type of boating /sailing	142.8	143.9	
WATERSPORTS			
Water skiing, jet skiing	19.2	*	
Surfing, sail boarding	17.8	*	
Scuba diving, Snorkelling	9.1	*	
Other sea sports	7.3	*	
SEASIDE AND RESORT TRIPS			
Swimming in the sea	353.5	538.8	decrease
Whale and dolphin watching	9.6	15.9	decrease
bird watching in coastal area	12.4	31.2	decrease
Visiting nature reserves etc in coastal areas	43.5	84.6	decrease
Other trips to the beach or seaside	1134.6	1047.8	increase
Other trips to the islands	33.2	*	
Any of the above water-based leisure activities	1475.8	1468.2	slight increase
All adults in the population	3013.6	2634.0	increase
% of adults in population undertaking any kind of waterbased leisure activity	49%	56%	decrease
*comparable figures not available in the 1996 survey			

5. 5 In terms of sailing and boating at sea some 105,700 people participated in 2003.of these 34% took part in the activity in their own boat.

- 5.6 Overall, demand for marine recreation in Ireland comes from four main markets:
- The local resident market i.e. those living in the surrounding area of a port / harbour, beach or other access point
 - Domestic day trip visitors, i.e. people who do not live locally, but who might use the services of a port / harbour. These people usually live within 60 – 90 minutes drive from the port or harbour
 - Domestic overnight visitors, i.e. Irish people who spend an overnight visit in the port / harbour area probably for holiday reasons
 - Overseas visitors, mainly visitors from Britain and Continental Europe
- 5.7 The first three of these categories are represented within the Marine Institute survey above with data on overseas tourism activity participants being collected by Failte Ireland in their exit surveys. There is no breakdown available for sailing and cruising markets although this is one of the special interest tourism categories Failte Ireland intends to focus on for 2006. Product development activity and promotions will be aimed at:
- sailing and yacht club members visiting Ireland with their own boats,
 - sailors in key geographic markets for chartering boats in Ireland,
 - the youth market for training opportunities in Ireland.
- 5.8 Sailing events are a key part of marine leisure and tourism with the following major events having attracted visitors in 2005.

BOAT OWNERSHIP IN IRELAND

- 5.9 The ESRI survey estimates that there are some 142,800 boats² in Ireland and the number of adults in Ireland is 3.013 million. Based on these figures an estimate of one boat for every 21 adults can be derived. With a total population of 4,015,676 the figure is 1:28
- 5.10 The IMF estimates that boat ownership in Ireland stands at approximately 1 boat per 171 people in the country, or remains low by international standards as outlined by the boat ownership per capita statistics presented below.

² Boats in the survey included non powered craft, sailing dinghy, sailing boats with auxiliary engines, personal watercraft, small fast powered boats, sports cruisers,, motorboats and motor sailers, RIBs and others

Table 5.3 Boat ownership – Country Comparison

Country	Per capita boat ownership
Sweden	1:7
USA	1:16
Netherlands	1:30
France	1:66
Italy	1:67
UK	1:100
Germany	1:108
Ireland	1:171
Poland	1:471
South Africa	1:1,700

World marine markets 2005 page 45,

Table 5.4 Boat/ Marina Penetration x Country

Item / Country	France	UK	Holland	Belgium	Ireland	Italy	Germany
No of boats	725,000	1.5 million	500,000	15,000	25,000	840,000	750,000
Marinas	261	150	600	8	24	*	*
No of berths	150,000	250,000	250,000	4,000	1,600	*	*
Population	60 M	60 M	16 M	10 M	4.0 M	58.1M	81m
Trends in value of boat sales	Strong growth €297m in 2001 €627m 2002 €345m 2003	Growth €349 m 2004 High demand for boats >10m				€3,000 m 2003 dominated by super yacht sector	Static €230 2001-2003

Adapted from Options for marine leisure development in Waterford Estuary – Marine Institute

THE VALUE OF THE MARINE LEISURE INDUSTRY IN IRELAND

- 5.12 A study undertaken by the Marine Institute in 200 x estimated the following values for sectors of the marine leisure industry in Ireland.

Table 5.5 value of Marina leisure Industry

Activity	Turnover €Ms	Dublin €Ms	S&E €Ms	BMW €Ms	Employees	Exports €Ms
Boat & Engine Sales	40.9	23.4	14.6	2.9	131	4.3
Chandlery	22.8	14.3	7.4	1.1	70	1.7
Yacht & Boat Charter	10.1	0	0.8	9.3	168	1.6
Marinas	10.8	5.3	3.1	2.4	83	0.5
Dive Centres	6.4	1.8	3.1	1.5	59	0
Insurance	6.6	3.1	2.0	1.5	25	0
Sail Training	4.6	1.6	2.1	0.9	156	0.2
Aquaria	2.7	0	1.7	1.0	32	0
Sea Angling	1.8	0.02	1.0	0.8	89	0
Publishing	0.3	0.3	0	0	4	0.05
Grand Total	107.2	49.9	35.9	21.4	817	8.4

Estimated Annual Revenue includes: Overseas Tourism Spend + Domestic Overnight Tourism Spend + Domestic spend on day trips + domestic spend on Equipment and other spend. **Domestic Revenue includes:** Domestic Overnight Tourism Spend + Domestic spend on day trips + domestic spend on Equipment and other spend. **Overseas Revenue includes:** Overseas tourism spend on limited number of activities. Angling Spend per Head is calculated at €633 by Fáilte Ireland. All other overseas figures are based on the CSO Average Estimate of Overseas Visitor Spend per Head of €526.

Source: Marine Institute

- 5.13 If the Dublin area and the South and East are taken together the turnover of the industry for the two regions totals some €85.8 million or 80% of the turnover of the Irish Marine Leisure industry. If this percentage is applied to the number of employees and the exports the component for the Dublin area and the South and East is 635 employees and €6.72 million in exports.
- 5.14 A survey of its members carried out by the Irish Marine Federation in 2004 (48 respondents) identified a total turnover of €66.7 million, 332 employees and exports of €8.1 million. Exports were recorded by 15 businesses (31%) and were to the UK, Germany, Netherland. South America and Malta.
- 5.15 In a recent marine foresight exercise carried out by the Marine Institute as a basis for the preparation of forward R&D programmes, Ireland's positioning and growth potential within world marine sectors was estimated by Douglas Westwood as follows:

- Ireland Marine Leisure market is estimated to have less than 1% market share in world marine tourism (0.09%)
- The world marine tourism market is estimated at 11% of all world tourism by value
- Ireland's marine tourism industry was worth €155 million (Europe €71,812 million) in 2004 and is forecast to grow by 14% between 2005 and 2009 based on an annual 3.3% growth rate. The marine tourism industry is growing at a slower rate in Europe than in the rest of the world 4.1%
- New leisure boat sales for Ireland totalled €14 million in 2003 compared to €324 million for the UK.
- The report also notes the upward trends in the construction and sales of super yachts (>80 ft) with a total of 651 orders for super yachts worldwide in 2004.

6. ACTIVITIES AND FACILITIES AUDIT

- 6.1 This audit of the marine-related tourism and leisure activities in the Carlingford Lough and Lough Foyle areas is based on fieldwork in May, June and July 2004, consultations with key individuals and a special meeting of the four yacht and boat clubs in Carlingford Lough in Newry on 21st June (at their request).
- 6.2 An Excel database was produced with each facility being given a grid reference that will allow GIS presentation of the data by the Loughs Agency. **Maps 1 and 2** identify the locations of marine leisure and tourism infrastructure and services in the two loughs and their catchments. A representative pictorial account of the database appears as an appendix to this report.
- 6.3 The information provided by the audit is summarised here, organised by type of marine leisure activity and infrastructure (as categorised in the section on definition).

Coastal and Waterside Walking (and cycling)

- 6.4 Neither the Foyle nor Carlingford areas have extensive provision for waterside walking. The beach from Magilligan point to Benone offers the longest opportunity. Short sections of the coastline are accessible as follows:

Foyle area

- At Malin Head a series of short walks, enable visitors to reach viewpoints over the North Atlantic at the most northerly point of the island. The walks are showing quite severe erosion impacts.
- A formal promenade at Moville enables visitors to enjoy sea views on firm surfaces, and in a park setting. The walk extends to Greencastle with a round trip of just over 4km.
- An old hill track allows for a walk from Dunagree to Kinnagoe Bay from the car park at Shrove.
- The riverfront in the city of Derry provides a walk and cycleway and this continues upstream as a cycle route.
- A series of roads installed as access to the 'levels' providing flood protection to the south-eastern shores of Lough Foyle are extensively used by local people for walking and as access points for bird watching and wildfowling.
- Benone beach provides extensive waterside access along its 11 km length to Downhill.
- The National Cycle Network, Route 93 Coast to Coast leading from Ballycastle to Ballyshannon is routed along roadways close to the coasts of Lough Foyle. The route provides views from the

Gortmore road and provides a link via the Foyle ferry to a proposed national cycle route in Donegal. Route 93 takes traffic free routes into and leaving Derry.

The main opportunity to increase access beside the waters of the Foyle and its catchment is at the levels on the south-eastern coastline where walking and bird watching provision could be signposted and promoted, and parking opportunities formalised.

Carlingford area

- A walk from Cranfield west to Greencastle takes the route of the beach via the Fair Green. It is impassable at high tide. A short walk is possible from Greencastle around the shores of Mill Bay.
- The Kilbroney Park at Rostrevor and the Rostrevor Forest Drive both provide walking opportunities close to Carlingford Lough and with extensive views over the Lough.
- Warrenpoint seafront provides a formal promenade along the coastline of the town.
- The Fathom viewpoint and a short rough walk provided by Newry and Mourne District Council overlooks the narrows of Carlingford Lough
- A short walk along the Quays at Newry overlooks the Canal Basin
- Short walks are available along the harbour at Carlingford and the seafront at Omeath.
- The Táin Trail goes through the Cooley Mountains and whilst it does not take a waterside route, it provides panoramic views of the lough. A map guide is available for the route.
- The Mourne Trail, part of the Ulster Way, also provides occasional lough viewpoints above Rostrevor as it heads through the Mournes to Newcastle.
- The Newry Canal Way provides traffic free walking and cycling access from Portadown to Newry, a distance of 20 miles. A map guide is available for the route.
- Greenore promenade/seafront is ideal for sea front walking inclusive of fisherman's car park, 600 yards of grass and path area (the beach walk extends for miles) with beautiful scenic views and a slipway. This is contained in the development plan.

Access to waterside walking and walking with views over water could be provided in the Carlingford Lough area though the development of paths along the Ship canal, along the embankment between the canal and the sea, and through the development of a route along the disused rail line from Newry to Greenore.

- 6.5 Only short sections of inland waters in the Foyle and Carlingford catchments provide any countryside access for waterside walking. Issues which restrict access in the areas include: a reluctance by farmers to take on any liability for recreational users; a low priority

placed by Councils on developing new countryside access opportunities; low demand for access by local people; and increased coastal development obstructing potential routes for waterside walks.

Swimming and Beach Activities

- 6.6 Both Loughs Areas have several good beaches, with three having EU Blue Flag status in 2004 (Culdaff, Cranfield and Benone) and one with a seaside award (Benone). Cranfield West is a particularly popular beach as it is south facing. The 11 km stretch of beach at Benone provides wide-open spaces for walking, beach activities and sufficient space to find a private spot. Most beaches in the areas have adjacent caravan sites and experience considerable summer influxes of caravan residents.
- 6.7 Benone beach is served by a public leisure complex that offers an excellent outdoor paddling pool and play area, and a series of summer programmes for children and adults. This facility becomes very busy at weekends and in good weather. On the other hand, Cranfield West has few facilities for visitors (only a car park, toilets and beach wardening staff).
- 6.8 Newry and Mourne District Council provide additional sand to Warrenpoint beach on a regular basis to maintain the town's interest as a seaside resort. The beach is used for general family activity and swimming, for jet ski launches and for windsurfing
- 6.9 Carlingford Town beach (beside the harbour access) is popular with local people, and for windsurfing, canoe, and dinghy access
- 6.10 The North Inishowen coastline offers a series of very attractive small bays and beaches, which are popular in good weather. Beaches include Culdaff (Blue Flag and full facilities), Culdaff E, Tremore, Kinnagoe and Dunagree. Culdaff is the subject of a demonstration coastal management project.
- 6.11 Benone beach has been twinned with Rossknowlagh beach in County Donegal (outside Loughs Agency area) for the purposes of an Interreg funded research programme on sustainable beach and dune management. The initiative is studying good practice in beach zoning, car parking, car use control measures, dune management and activity management. The study involves University of Ulster at Coleraine, Limavady Borough Council, and Donegal County Council. It is intended that the results of the study and pilot will be disseminated to other beach managers faced with similar issues of car usage, environmental degradation and inter user conflicts.

Coastal Drives

- 6.12 The only formal scenic route in either area is the Inishowen 100, a hundred mile scenic drive around the coast of the Inishowen peninsula. This includes one of the best viewpoints over Lough Foyle - from Knockallain and Malin Head.

- 6.13 On the Limavady side of Lough Foyle, a signed short route to the Gortmore viewpoint also provides a view over the Lough across to Inishowen.
- 6.14 The Foyle ferry between Greencastle and Magilligan Point has made it possible to tour both sides of Lough Foyle easily and to take a circular route from Derry in doing so.
- 6.15 Carlingford Lough has some spectacular viewpoints. At Fathom, there is a formal car park and viewpoint. From the Rostrevor Forest Scenic Drive, there is a walk to the Cloughmore stone from the high car park, which gives good views over to Slieve Foye and Carlingford.
- 6.16 Neither lough lends itself easily to a single signed scenic drive and good signing and lay-by provision at additional viewpoints may be adequate to ensure that visitors encounter the best views.
- 6.17 Inishowen Tourism Society has produced a fold out map of its area that illustrates the route and places of interest on the Inishowen 100. However, signing on the ground is confusing to the visitor and there is a lack of on-site interpretation at specific viewpoints or places of interest.
- 6.18 Similarly, the Geological Survey of Ireland, in association with Newry and Mourne and Louth councils and ROSA (Regeneration of South Armagh) have produced “Explore Mourne, Gullion and Cooley” a guide for a 140-mile tour through the area. In addition, the Carlingford/Cooley Tourism Association sells its foldout map of driving tours that covers the whole of the Carlingford area and beyond. The Oriel Trail also includes the Cooley Peninsula, as well as the rest of Louth.
- 6.19 The North Atlantic Trail, proposed for the Causeway Coast area will finish (in its proposed initial phase of development) at Magilligan Point to allow ferry access to Donegal. Proposals for a later stage of development include a link to Scotland via the reinstated Ballycastle Ferry. This route should help to deliver more visitors to the Foyle Area.

Coastal drive Greenore via Balnamoney, Ballagan Point, and Whitestown which takes in approximately 6 miles of rugged coastline

Scenic Boat Trips

- 6.20 The only scenic passenger boat trip on the two loughs is the *Toucan I*, owned by Foyle Cruise Line, which takes trips from the Foyle Pier along the river and out into Lough Foyle. The operator would like to expand to provide a similar boat at Warrenpoint and to provide RIB (rigid inflatable boats) adventure trips to Inishtrahull Island from Greencastle.

- 6.21 A waterbus formerly provided cruises on Carlingford Lough from Warrenpoint.
- 6.22 Some sea angling and dive boats diversify at times into scenic boat trips. Formerly, fishing boats would have provided trips on an opportunistic, informal basis but maritime safety regulations in both jurisdictions now require such boats to be licensed, to meet stringent requirements and to carry a set manifest of equipment including life rafts and lifejackets for all persons on board. Thus, safety requirements are difficult to meet in traditional fishing boats and most people offering trips nowadays purchase purpose-designed boats.
- 6.23 The Foyle ferry provides an additional and easily accessible opportunity for a short sea voyage as part of a visit to the area.

Ferry Trips

- 6.24 The Foyle Ferry started operation in June 2002. It provides a half hourly service between Greencastle and Magilligan. The journey takes only 15 minutes but it saves a considerable amount of driving time. It can take 40 cars and 250 passengers at a time. The Lough Foyle Ferry Company runs it for Limavady DC and Donegal CC.
- 6.25 In the year from June 2002, it carried 279,162 passengers and from June 2003 until April 2004, the figure was over 300,000. July and August figures of 48,000-58,000, compared with 7,000 and 10,000 in the winter, show that there is a strong tourism/day visitor use in summer.
- 6.26 A long-standing proposal for a vehicle ferry between Greenore and Greencastle in Carlingford Lough remains active. Local interests at Greencastle have resisted the ferry proposal on a number of grounds³ including: the changes that would be inflicted on the quiet cul-de-sac nature of the area; the unsuitability of the road and bridges from the village to the main road network; the colony of terns at Green Island; the area's status as a special protection area for birds; and the Greencastle seal colony. The ferry was subject to a successful feasibility study and has had an environmental appraisal, which has not been published. The project was promoted by the two Councils and backed by the East Border Region Committee.
- 6.27 A further proposal for a bridge at Narrowwater to serve the same purpose as a ferry has been made on a number of occasions and is currently live. The bridge would reinstate traditional links between Warrenpoint and Omeath. The idea of a bridge has considerable local community support and local interests have completed a feasibility study and costing.
- 6.28 The former foot passenger ferry between Warrenpoint and Omeath will be reinstated in 2004 for the foreseeable future. A private operator has received grant aid to assist in running the ferry.

³ See www.greencastle-countydown-northernireland.co.uk

- 6.29 A ferry across the broad part of the lough would assist in completing the conditions for a circular touring route of Carlingford Lough and would contribute to the development of marine tourism in the area. However, alternative deep water landing points on the north shore of the lough should be considered to protect the historic Norman settlement of Greencastle.

Cruise Ship Visits

- 6.30 The City of Derry/Londonderry welcomed six visiting cruise ships into Lough Foyle in 2003 and seven are scheduled to arrive in 2004.
- 6.31 Those up to 135m long dock at the Derry Quay (i.e. the western waterfront of the City); those of 200m have to go to the Port on the opposite side of the river at Lisahally; and anything larger anchors off Greencastle/Moville and the passengers are tendered ashore.
- 6.32 These visits are the result of the efforts of Cruise North West, a specialist marketing body.
- 6.33 A University of Cork study suggested that those in 2003 generated 1.3m euros for the Derry economy. However, consultations have suggested that the local impact of these visiting cruises would be greater if the passengers stayed overnight or if they actually spent more time in the City, rather than being transported off to other areas (e.g. Giant's Causeway and Donegal). Nevertheless, they are an important source of overseas visitors to the area in general and they are helping to develop its image as a place that is well worth a longer visit.
- 6.34 Carlingford Lough is not a destination for large cruise ships. Their entry into the Lough would require good pilotage and would be heavily dependent on tides. However, there have been a few visits from Tall Ships, which anchor in the lough and occasionally berth at the Albert Basin on the Newry Ship Canal. Several are interested in attending a maritime festival planned for Carlingford Lough next year.

Visitor Centres, Museums, Places of Interest, etc

- 6.35 The main visitor centres with marine/river themes in the Foyle Area can be summarised as follows:

- **Inishowen Maritime Museum (Greencastle)**

Opened in 1995. Run by Inishowen Maritime Heritage Company. Was the old Custom House. Visit numbers have gone up every year (6,000 last year). Ferry has helped. Now getting more visitors from the Antrim Coast. Desk at Magilligan acts as information point. Hosts events (art exhibitions, monthly rocket launching) and has its own planetarium.

- **Harbour Museum (Derry)**

Displaying the City's maritime and river connections. Replica of the curragh that took St Columba to Iona in the 6th Century. Also temporary exhibitions.

- **The Workhouse Museum (Derry)**
Battle of the Atlantic Exhibition: "Atlantic Memorial"
- **The Tower Museum (Derry)**
With wreck finds.
- **Riverwatch (Derry)**
Loughs Agency visitor centre. Tells the story of the lifecycle of the salmon, the threats it faces, and the fishery activity associated with it. The centre also looks in an informative way at human impacts on waters and aquatic species and details management measures. The cultural dimension of people's relationship with natural resources is also explored in the centre through poetry and art.
- **Magilligan Martello Tower**
In the care of the Environment and Heritage Service
- **Carlingford Village**
Mainly maritime because of its location but considered to be Ireland's best-preserved mediaeval village, with 3 castles and 2 abbeys. Carlingford Heritage Centre presents the history of the village
- **Narrow Water Castle**
In the care of the Environment and Heritage Service

Malin Head, Ireland's most northerly point, is one obvious area where a visitor centre or interpretive centre is badly needed

Maritime-related Events and Festivals

6.36 The main existing events held in the Foyle Area can be summarised as follows:

- **Foyle Regatta**
Was held for the first time last year, with 38 boats (34 participants) over 2-3 days. Being repeated this year in 2nd week of July. Run from the Foyle Pontoon in Derry by the Port staff and some from the Council. Race from Derry to Moville. Trying to build up annually to a major Maritime Festival.

- **Other Regattas**
Moville (August), Culmore (August), Greencastle (August), Shroove
- **Culdaff Sea Angling Festival**
Held in June. Culdaff also a base for walking and cycling holidays.
- **Moville Raft Race**
Held in August
- **Canoe and Kayak races.**
Canoe clubs inside and outside the area organise events on Foyle system rivers. These include the Finn White water race, the Faughan Descent, Owenkillew, and Mourne whitewater races. Dates vary but all are held in October to December period when there is the likelihood of high water levels.

6.37 Carlingford Lough interests also host a series of maritime related events including

Maritime festival in March 2004 organised by Newry and Dundalk museums with talks and events based on local maritime history, local boat building and re enactments, and traditional boats. Event culminated at Carlingford Harbour. Part of a cross-border education programme.

Warrenpoint Regatta held in August by Warrenpoint Boat club, racing for cruisers, lasers, and Flying 15s.

Carlingford Lough Endurance Challenge in July each year and involving mountain running, mountain biking and sometimes sea kayaking or swimming. (triathlon type event)

Monely Oyster Pearl Regatta and its feeder races are an annual yacht racing series based out of Carlingford Marina and organised by Dundalk and Carlingford Sailing Club. Normally held in June.

Harbour Sunday – September family fun day based at Carlingford Harbour and with water based fun events.

Carlingford Oyster Festival (August)

Proposed Carlingford Festival next year

Coastal rowing or gig racing is experiencing a revival in Ireland and many coastal towns have organised themselves to compete in four and six oar competitions. The study team found no activity of this type but it may be under consideration. In the Derry and North Coast area, there has been considerable interest and participation in a re-enactment of St Columba's journey from Ireland to Iona in the Columbkille (built 1997) and in subsequent cross-community voyages to Brittany and around the Irish coastline

Celtic Maritime Festival

- 6.38 There are current proposals for a Celtic Maritime Festival in 2006 that will end in the Foyle Area. It is being promoted by North West Rural Development, a company limited by guarantee, core funded by Peace money and shortly by INTERREG. The proposal has been market tested in Galicia and Brittany. The outcome of an economic appraisal is awaited.
- 6.39 It will be held over 2 weeks in June 2006, with the final 3 days in the Foyle (if there is sufficient berthage).

Health Therapy

- 6.40 Thallasootherapy (seaweed baths and treatments) and other health related activities associated with sea and coastline is increasingly offered in resorts around Ireland. No activity of this kind was found in the study area.

SPECIALIST ACTIVITIES

Sea Cliff Climbing

- 6.41 Sea cliff climbing is absent from most of the two Loughs Areas because the topography in general does not provide a cliff environment. However, there is considerable sea cliff climbing activity and exploration along the north Inishowen coastline with notable sites for climbing at Dungloon (Kinnagoe Bay), Dunmore Head (Culdaff), and Dunowen (Culdaff). Climbers constantly seek new routes and the area has considerable potential for further exploration and climbs. Climbers from all over Ireland and further afield travel to Donegal to these cliffs and there is increasing interest in finding routes on the cliffs of remote islands.

Sea Level Traversing/Coasteering

- 6.42 The objective of coasteering is to climb horizontally along rocky shores and cliffs trying to avoid falling into the water. No sea level traversing trips are known to take place in the two Loughs Areas, although parts of the Inishowen and north Lough Foyle coastlines offer suitable terrain. Most coasteering is undertaken as a group activity from outdoor centres on days and in areas where there is no swell.

Coastal Horse Riding

- 6.43 Most beaches in the area are used by local people to exercise their horses. Beaches have become more important for this activity in recent years as traffic on roads has increased. There are developing issues

elsewhere in respect of restricting horses from Blue Flag beaches on grounds of bather hygiene.

Sand Yachting, Kite Buggies and Kite Boards

- 6.44 The main location in the two Loughs Areas for regular sand yachting, kite buggies and kite boarding is Benone/Downhill beach. The area is well liked by participants for its width at low tide and its firm surfaces, and people travel considerable distances to take part. Particularly popular is Limavady Borough Council's positive approach to activities on the beach, and this is a unique selling point, making it one of the premier venues in Ireland. Clubs and loose associations of kite boarders have meets at the beach. Accommodation is a problem for people staying for weekends and short breaks based at Benone, as it is only available for visitors in touring caravans or at the hostel in Downhill, which has a good reputation amongst visiting kite sailors.

Marine Archaeology

- 6.45 Following significant discoveries of marine archaeology in the waters of Strangford Lough, the potential for new discoveries in Lough Foyle is considered to be significant. It will be some time before any visitor opportunities based on marine archaeology are developed and these are likely to make only a small contribution to tourism development in the area.

Wildlife Watching and Birdwatching

- 6.46 Lough Foyle and Carlingford Lough both contain Special Protection Areas for Birds (SPA) designated under the EU Birds Directive, Areas of Special Scientific Interest, and Ramsar sites.
- 6.47 The Lough Foyle site is of particular interest for its mud and sand flats and areas of salt marsh and brackish ditches. These support internationally important numbers of Whooper Swans, Light Bellied Brent Geese, and Bar Tailed Godwit. Overall, the area supports over 20,000 over-wintering wildfowl. The RSPB manages a reserve on the eastern shores of Lough Foyle.
- 6.48 Lough Foyle bird watching sites are recommended on the NITB website as follows:

Culmore Rubbish Dump

Important Bird Area

Location on A2, 6 miles north of Derry city, turn right after security checkpoint

OS ref. 479227, sheet 7

Species: glaucous and Iceland gulls share pungent smells with curlew sandpiper, whimbrel, black-tailed godwit, goldeneye and red-breasted merganser.

Royal Society for the Protection of Birds - Lough Foyle Reserve

Important Bird Area, Area of Special Scientific Interest

Location east from Longfield Point to Roe estuary.

Access to the 3,300-acre reserve is left off A2 eastwards, at three particular points to

reach three particular viewing points. Take care at unmanned railway crossings. Species: teal, wigeon; grazing swans and geese; Slavonian grebe, great northern, red-throated divers; little stint, spotted redshank on passage.

Longfield

*Location left past sign for Eglinton Flying Club
OS ref. 544237, sheet 7*

Faughanvale

*Location left at Faughanvale Bar
OS ref. 581224, sheet 7*

Ballykelly Marsh

*Location left at Bridge House in Ballykelly
OS ref. 620246, sheet 7*

Roe Estuary

*National Nature Reserve
Location left off A2 before Bellarena level crossing
OS ref. 640285, sheet 4
Species: wintering bar-tailed godwit, curlew, redshank and wigeon; associated raptors. The Myroe Banks to the south offer views at high tide over the lough: in calm conditions Slavonian grebe and divers can be seen (winter).*

Magilligan Point

*National Nature Reserve, Important Bird Area
Location B202, left off A2
OS ref. 665378, sheet 4
Species wintering great northern and red throated divers, long-tailed duck, snow bunting. Out at sea, gannet and skuas.*

Gortmore

*Location public car park signposted at Downhill
OS ref. 707338, sheet 4
Species: cliff-breeding fulmar, rock dove, buzzard, and peregrine.*

The majority of sites offer no visitor facilities beyond small car parks.

- 6.49 Carlingford Lough SPA supports internationally important numbers of Sandwich Tern and Common Tern and is also important for over-wintering wildfowl such as pale-bellied Brent Geese. The National Trust owns Green Island off Greencastle in Co. Down with the purpose of retaining the large population of tern for which it is a refuge. The Northern Ireland Tourist Board recommends the site as follows:

Carlingford Lough/Green Island

*Area of Special Scientific Interest, Royal Society for the Preservation of Birds/National Trust, Important Bird Area
Location: Greencastle Point, south-west of Kilkeel
OS ref. 220135/241 118, sheet 29
Species: significant number of pale-bellied Brent goose and scaup in winter; breeding Arctic, common and Sandwich tern on islands (landing on islands strictly prohibited). Occasional Slavonian grebe, long-tailed duck among commoner goldeneye, red-breasted merganser.*

There are no visitor facilities at Greencastle Point.

- 6.50 The North Inishowen peninsula and the entrance to Lough Foyle are notable places from which to view whales, dolphins and porpoises and

there may be potential for wildlife watching boat trips or coastal walks based on this activity.

- 6.51 Carlingford Lough receives visits from harbour porpoises and dolphins but is more notable for its seal colonies e.g. at Greencastle.

Boat Trips- fast/adventure/RIB

- 6.52 At present, although fast trips in rigid inflatable boats (RIB) to view islands, coasts, and wildlife are increasingly popular, there are no products of this type offered within either lough. One operator hopes to set up such a business in Lough Foyle offering trips from Greencastle to Inishtrahull. Given boating trends elsewhere, it is to be expected that RIB use in both loughs will increase, especially where public slipway access is provided.

Boat Trips - wildlife

- 6.53 No wildlife boat trips are offered as an exclusive activity in the two areas. Dive and angling charter boats do, however, point out wildlife to their clients and the boats can be chartered on this basis. With the growth of eco-tourism generally and the quality of the wildlife resources of the two areas, this is an activity that is expected to be in greater demand in the future.

Boat Access Sub-aqua Diving

- 6.54 The number and diversity of wrecks along the Lough Foyle and North Inishowen coastline attracts divers to the area, although many sites are only suitable for specialist divers because of their depth. Carlingford Lough also has a range of dive sites of interest but does not attract as many divers.
- 6.55 Inishowen Tourism Society lists: single wrecks off Portaleen, between Culdaff Head and Glengad Head and in Kinnagoe Bay (i.e. the La Trinidad Valencera); 18 near Inishtrahull Island; 9 near Inishowen Head; and over 30 around Malin Head.
- 6.56 *MV Salutay* operated by Norsemaid Sea Enterprises visits the Foyle/Inishowen area periodically for diving holidays, beginning in Bangor or Scotland and diving a range of sites across the north coast and Donegal on 4 to 10 day trips, including in Culdaff Bay.
- 6.57 Other boats local to the loughs and available for dive charter include the *Pisces II*, operated by Peyton Cunningham from Greencastle, Co Down and *Carlingford Lough Sea Angling Charters*, operated by Oliver Finnegan from Warrenpoint and Carlingford. Whilst *MV Salutay* is a residential dive boat, the others use local accommodation for their diving guests. The *San Miguel* has operated in the past from Kilkeel.

6.58 The majority of divers resident in Ireland participate as part of clubs or centres where safety back up is available. There is a sub aqua club in both cities in the study areas: the Maiden City Sub Aqua Club in Derry and Newry and Mourne Sub Aqua Club in Newry. Omagh also has a sub aqua club. The nearest dive centre to the Foyle is Aquaholics in Portstewart and the nearest to Carlingford is in Kilkeel or Strangford Lough. The Inishowen dive sites used by Aquaholics include:

- **MV William Manell** - First World War converted minesweeper sunk when she hit a mine. Lying in 30 metres of water in Culdaff Bay, Co. Donegal.
- **SS Castle Eden** - First World War freighter torpedoed. Lying in 32 metres of water in Culdaff Bay. Broken up but contains lots of marine life.
- **Devil's Cut Malin Head** - Huge caverns link the gully to the open Atlantic Ocean. Perfect conditions are needed. A boat is highly recommended but can be shore dived with perfect conditions and fit divers (if they exist).
- **Inishtrahull Island** - Various wreck and reef dives around this island, strong tides and exposed seas requires experience and well equipped divers. (source – aquaholics website)

6.59 Diving activity is coordinated and regulated through four main organisations: CFT the Irish Underwater Council, the Sub Aqua Association (UK), the British Sub Aqua Club (UK) and the Professional Association of Dive Instructors (PADI)(worldwide). Each has a training syllabus at different levels that divers need to complete to demonstrate to others that they can dive safely. Of these, PADI is most recognised internationally and many visitors look for PADI approval when selecting a dive centre.

Shore access sub aqua diving

6.60 The main site promoted for diving in the Loughs Agency area is Malin Head one mile west of Portmore, where the coastline offers underwater sea caves and gullies.

Boat Based Sea Angling

6.61 Boat based sea angling is popular on both loughs and charter boats are available in both areas. Sea angling has been identified as one of the strengths of Lough Foyle within a previous study for the Loughs Agency and plans are being taken forward to increase berthing for sea

angling craft at Carrickrory and at Bunagee (Culdaff), which are identified as the most important strategic locations for the activity.

- 6.62 Both loughs are capable of producing good specimen sea angling, with Carlingford Lough holding the Irish record for tope (66½ lbs). Donegal is well known for its wreck fishing and for blue fin tuna and shark.
- 6.63 Three boats advertising sea angling services in the Loughs Agency areas are:
- *Barracuda* (33ft) operated from Culdaff by John McLaughlin
 - *Pisces II* operated from Greencastle by Peyton Cunningham
 - *Sharon Michele* operated by Oliver Finnegan from Warrenpoint and Carlingford.
- 6.64 All skippers arrange accommodation and other services for their guests.

Shore based sea angling:

- 6.65 Lough Foyle, the north shores of Inishowen and Carlingford Lough all provide good shore based sea angling. The following shore fishing opportunities are highlighted in the Inishowen tourism website.
- **Malin Head:** Access to several outcrops on Northern Shore. Fishing for Pollack, coalfish, wrasse, and occasional conger. Should not be approached in northerly winds.
 - **Malin Head Pier (Portmór):** Spinning and float fishing for coalfish, Pollack, and mackerel in season. Bottom fishing for occasional conger, dogfish, and dab.
 - **Glengad Head:** Spinning for Pollack and mackerel (in season). Float fishing for wrasse and coalfish.
 - **Bunagee Pier** and adjacent rocks: Spinning for Pollack and mackerel (in season) and occasional sea trout. Float fishing for coalfish, wrasse, and mullet.
 - **Culdaff Bay:** Beach fishing (night tides best) for dogfish, dabs, flounder, sea trout, and occasional bass. Rock fishing below Dunmore Head (east of beach) for Pollack, coalfish, and wrasse.
 - **Tremore Bay:** Rock fishing at western end for Pollack and wrasse. Beach fishing for dogfish, flounder, dab, plaice and occasional bass and sea trout.
 - **Kinnagoe Bay:** Rock fishing at either end of the bay for Pollack and wrasse. Beach fishing for flounder, dabs, plaice and occasional sole, bass and sea trout. Dogfish and spurdog in autumn.

- **Moville Pier:** Mackerel and mullet occasionally in summer. Bottom fishing for conger. Specimen fish recorded.
- **Pilot Pier:** Spinning for mackerel in summer. Bottom fishing for flounder, dab, dogfish and occasional ray. Ground baiting will attract mullet

Benone beach provides a venue for shore fishing competitions including having hosted the all Ireland open shore competition in 2001. Fishing provides for example turbot and bass.

Carlingford Lough offers shore fishing at Carlingford pier with dogfish, flatfish, occasional ray, and conger. The area below the lighthouse at Greenore has mackerel, sea trout, bass, and small pollack. Local people fish from the rocks at Greencastle.

Greenore

Greenore is a Peninsula which incorporates a gently sloping raised shingle beach which is in fact a continental shelf, this feature means that at low tide, three metres from the waters edge there is a twenty metre sheer drop created and maintained by the strong currents that ebb and flow in the Lough. These conditions leave it ideal for angling with a wide range of fish to caught all year round including Skate, Dogfish, Plaice, Codling and Conger eel as well as many types of shell fish such as crab and lobster. For the past century Greenore Point is most famous for its summer fishing of Mackerel and Pollack and from July to September these can be seen in feeding frenzies along the shore. Almost as big a frenzy is that on the many anglers who gather at this spot. There is no other area on Carlingford Lough that this can happen.

Waterskiing and Wakeboarding

- 6.66 Waterskiing, wakeboarding, and other types of towed activity take place from most caravan sites in the areas. Cranfield West beach is the busiest venue for these activities. However, waterskiing is tending to be replaced or crowded out by jet skiers at Cranfield, because the two activities are unable to co-exist in a relatively small zone.

- 6.67 Lough Foyle

Jet Skiing

- 6.68 Jet skiing takes place mainly at Cranfield, Warrenpoint, and Carlingford in the Carlingford Lough area and at Benone, Moville, and Greencastle in the Lough Foyle area. There are occasional opportunistic launches elsewhere but no focal points.

- 6.69 Jet skiing has only recently been permitted at Benone where a specific launch and operation zone has now been identified and notified to users.
- 6.70 Cranfield is arguably the busiest location in Ireland for jet skiing and has been used as a competition venue in the past. A swimming zone has been established there to protect swimmers using the Blue Flag beach. All other activities operate outside that and currently jet skiing shares the remainder of the bay with water-skiers, kayakers, and windsurfers, resulting in regular conflicts between the activities. Newry and Mourne District Council manages the beach and keeps arrangements for beach-launched activities under review. A new slipway has been provided in 2004 adjacent to the public car park for public access by jet skis etc. A new system of craft registration will also operate in which owners will have to show insurance and display a registration number before using the slipway. Boats will have to conform to a code of conduct to use the slipway and the Council will be able to refuse launching to non-compliant boats.
- 6.71 There are local concerns about the safety of jet skiing at Cranfield with fast, high-powered craft being driven by children as young as eight, and no restrictions on the number able to operate in the bay at any one time.
- 6.72 New legislation in Ireland to control fast powered craft use has made it an offence for a person under 16 to be in control of a fast powered craft (capable of 17 knots speed and more), and a person under 12 yrs of age to be in control of any craft with an engine over 5hp. It is arguable that given the arrangements for joint jurisdiction of the Loughs this legislation should apply (at least in respect of control of launches from public beaches) at Cranfield W beach and Benone. The spirit of the change in legislation was to avoid the occurrence of people without sufficient strength and competence being in charge of fast powered craft. New legislation on alcohol consumption by those in charge of recreational craft has also been introduced.
- 6.73 Jet skiing is rarely popular with other beach users or caravan residents on the grounds of noise. Although technology is producing increasingly quiet new jet skis, the active second hand market in these craft keeps noise levels high.
- 6.74 RYA and ISA have assumed responsibility for providing training for personal watercraft (jet ski) operators including a simple day training programme that could be offered in resorts such as Cranfield and Benone to improve safety. RYA has worked with local authorities in England and Wales to produce a guide for local authorities to

managing personal watercraft.⁴ The guide is sponsored by the British Marine Industries Federation (amongst others)

Powerboating

- 6.75 Powerboating takes place throughout both Lough Areas in RIBs and speedboats. There are three recognised powerboat schools in the two areas at Dundalk and Carlingford Yacht Club, Carlingford Lough Yacht Club and at the BIM fisheries college at Greencastle (Co Donegal).
- 6.76 RIBs are becoming very popular and currently represent the largest category of new boat sales. They are capable of making very fast trips to quite distant places and have spawned a new pattern of boating, for example ‘rib raids’ by groups of RIBs may leave the Isle of Man in the morning, lunch in Ardglass and return in the afternoon. Boats from the north coast make short work of trips to Islay, Jura and Sanda.
- 6.77 There is potential for competitive power boating events on the river Foyle in Derry.

Motor Cruising

- 6.78 There is relatively little motor cruising on the loughs although all of the boat and yacht clubs have a few motor cruising members. Such activity is limited on Lough Foyle by the lack of sheltered berthing. The same applies to Carlingford Lough where there is also a lack of all-tide destinations. There is a large number of motor cruisers in Belfast Lough based in marinas at Carrickfergus and Bangor. These may be tempted to ‘cruise in company’ to either lough on an organised basis.

NON MOTORISED SPORTS

Sail Boarding/Windsurfing

- 6.79 Sail boarding or windsurfing takes place in both areas. Warrenpoint, Carlingford harbour beach, and Magilligan/Benone are the main focal points for the activity. Windsurfing also takes place at Culdaff.
- 6.80 A windsurfing school and hire opportunity operates from Benone in the summer months as part of the Council’s activity programme for the site. Carlingford Adventure Centre offers windsurfing courses as part of its wider water sports programme.

⁴ 2004. Managing Personal Watercraft – A guide for local and harbour authorities www.rya.org.uk

- 6.81 Creggan Country Park also offers training and experience in windsurfing on its activity lake.

Sea Kayaking including kayak surfing

- 6.82 Sea kayaking is an increasingly popular activity in the Loughs and several local clubs have active programmes. Kayakers from the rest of the UK also visit Ireland for this activity. Robin Ruddock has produced a sea kayaker's guide to the Causeway Coast that includes directions for Lough Foyle and parts of Inishowen and this has stimulated some interest.
- 6.83 In Carlingford Lough, sea kayaking is of most interest around the Haulbowline lighthouse, limestone reefs, and Blockhouse Island. Although the four outdoor centres in Carlingford Lough area all provide kayaking, this is normally in more general-purpose craft and in sheltered waters around the centres. Tollymore Mountain Centre in the Mourne provides courses in sea kayaking that use Carlingford Lough at times.
- 6.84 Several clubs use the Carlingford and Lough Foyle areas including Foyle Paddlers, Donegal Canoe Club, Annalong Canoe and Kayak Club, Causeway Coast Kayak Club.
- 6.85 Kayak surfing takes place at Benone beach where the surf is most reliable and also, occasionally, at Cranfield West in Carlingford Lough, when the wind direction is right.

River Canoeing and Kayaking

- 6.86 River canoeing and kayaking are popular in the Lough Foyle area. Regularly paddled rivers include the Roe, Faughan, Foyle, Strule, Mourne, Finn, Owenkillew, Glenelly, Drumragh, and Camowen. Of these, the most attractive to visiting paddlers is the Owenkillew, which has an embarkation point at Gortin giving access to grade III white-water downstream. An activity hostel at Gortin and activity-friendly self-catering accommodation are used by canoeists visiting the area.
- 6.87 The Finn also has a reputation for good white-water and there is an annual white-water race on the river. White-water races are also held on the Mourne, Owenkillew, and Faughan rivers in October to December periods when water levels are normally high.
- 6.88 The Roe offers an interesting section of white water above and through the Roe Valley Country Park, with one of the most interesting sections

through the Dogs Leap. A local agreement between paddlers and anglers maintains reasonable relations between users of this section.

- 6.89 The Department for Culture Arts and Leisure and the Councils along the Foyle System have inherited a series of canoe steps constructed some 25 years ago to facilitate canoeing on the river. These are at Bloody Bridge (Camowen), Drumragh Bridge (Drumragh), Omagh Playing Fields, Omagh Town Centre, near Mellon Country Inn and Plumbridge.
- 6.90 Strabane District Council also constructed a new set of steps downstream of the confluence of the Owenkillew and Glenelly rivers. The Canoe Association for Northern Ireland and the Countryside Access and Activities Network are currently proposing to install a canoe trail along the Foyle from Omagh to Strabane or Derry with the intention of attracting more canoeing visitors to the area. This could lead to the provision of services such as canoe outfitting, transportation and guiding.
- 6.91 In the Carlingford area the most attractive and popular white-water canoeing river is the Whitewater, which enters the lough at Mill Bay. The river is navigable in spate conditions from Attical with sustained interest all the way to the sea. Some sections are grade IV, which makes it suitable only for advanced canoeists. Recent habitat enhancement schemes have changed the nature of the river and have lessened its interest but not its difficulty. Most other rivers entering Carlingford Lough are too small to provide canoeing interest.
- 6.92 Canoe hire is available at Warrenpoint for outings around the hire point. There are no other canoe outfitting outlets, though a visitor who knew of the outdoor centres in the Carlingford area might be able to make arrangements. Access to canoes and kayaks is normally only part of an instructed/guided session.
- 6.93 Canoeing also takes place on inland loughs in the area including Moor Lough, Enagh Lough, Gortin Lakes, and Creggan Country Park Lakes. Most of this usage is by schools, colleges, and other outdoor centre programmes.
- 6.94 Both loughs areas are used for canoeing and kayaking by a range of groups ranging from local sport and youth clubs to outdoor centres and management development groups.

Keelboat Sailing, Cruising and Racing

Carlingford

- 6.95 Sailing takes place primarily from yacht clubs and from the marina at Carlingford. In the Carlingford Area, there are four boat clubs:
- Carlingford Lough Yacht Club at Killowen,
 - Dundalk and Carlingford Sailing Club
 - Warrenpoint Boat Club
 - Rostrevor Boat Club.
- 6.96 Of these, the busiest are the marina, Killowen and Carlingford. Both Carlingford and Killowen have regular races. The four clubs have formed a Carlingford Lough Boating Association to coordinate events and initiatives.
- 6.97 There may be in the order of 250 keelboats on Carlingford Lough, with approx 180 in the marina, 20 at Killowen, 12 at Warrenpoint, 15 at Rostrevor and 3-4 at Greencastle. With the exception of the marina, boats lie on swinging moorings. In addition, trailer sailors use some of the slipways around the lough.
- 6.98 Local sailors support the proposal for a marina at Warrenpoint and they would prefer it to be in the harbour basin in the centre of the town. This would solve the difficulty of the Carlingford marina being over-subscribed and the limited berthing available at Warrenpoint at present. A feasibility study was prepared some time ago by KMM for Newry and Mourne District Council.
- 6.99 A further proposal has been put forward for berthing for leisure craft alongside in Carlingford harbour. This harbour dries but it would be possible to create a deeper pool to float visiting boats throughout the tide, although there would not be all-tide access. Funding has been obtained from the Republic of Ireland Lotto for this proposal.
- 6.100 Carlingford Lough suffers from a lack of destinations for sailing. At present only the marina and the pontoon at Warrenpoint are accessible to keelboats. Boats can come alongside at high tide at Rostrevor Quay but this is a private quay and currently the base for a mussel dredger. The Warrenpoint pontoon is in poor condition, but does provide an opportunity to visit the town. There are no visitor moorings at all on Carlingford Lough but potential to provide these at Rostrevor, Greencastle, and possibly Warrenpoint following a dredging programme.
- The two main sailing events in the lough are the Warrenpoint Regatta and the Oyster Pearl races. The first attracted 40 boats from around the lough last year and is planned for August 7th and 8th in 2004. The Oyster Pearl attracts boats from outside the lough and is well attended. It has the potential to grow into an event like Cork Week or Strangford

Week if sufficient resources area applied. Feeder races from Skerries, Strangford, Port St Mary (IOM), Malahide, Howth, and Carlingford are run as a preliminary to the event.

- 6.101 The two main clubs have strong youth and dinghy sections. Dinghy racing from Killowen sports a fleet of 30 at weekends. The clubs also have training sections and are RYA /ISA approved training centres, including powerboating. Carlingford Lough has attracted many high profile dinghy events including J24, Flying 15s, Fireball, Mirror, and Laser championships. Carlingford Lough YC usually hosts the events but has difficulty finding sufficient accommodation locally for competitors and their supporters.
- 6.102 Sailing also takes place from the four outdoor centres on Carlingford Lough, mainly for pre-booked groups. These are:
- Killowen Outdoor Centre owned by Southern Education and Library Board
 - Táin Centre – private sector
 - East Coast – private sector
 - Carlingford Adventure Centre – private sector.
- 6.103 Bareboat and skippered charter are available from Carlingford Marina through the Carlingford Lough Yacht Charter and Sea School together with competent crew, day skipper, and Yachtmaster courses and assessments.
- 6.104 The main source of water activity for visitors who do not pre-book is Carlingford Adventure Centre. Otherwise, there are no easy opportunities for casual visitors to take part in sailing.

Lough Foyle

- 6.105 The majority of people in the Foyle area who are interested in keel boat sailing keep their yachts in Lough Swilly and are members of the Lough Swilly Yacht Club. The new marina at Fahan provides access to attractive cruising grounds and destinations such as Buncrana, Rathmullan, and Port Saloon within relatively sheltered waters.
- 6.106 Two boat clubs serve those who prefer Lough Foyle for their activity, namely, Culmore and Moville.
- 6.107 Moville Boat Club, whose members currently keep their boats on swinging moorings seaward of Carrickrory pier, has plans for a floating breakwater and 64 berth pontoons at Carrickrory as a first step towards a much larger marina on the western shores of Lough Foyle.

- 6.108 This marina would then also be capable of servicing sea angling craft and providing a base for visiting yachts that find Greencastle too congested.
- 6.109 Culmore Boat Club, which has been based at Culmore Point since 1971, has plans for a new clubhouse. The current clubhouse, part of a historic tower guarding Culmore point, provides a base primarily for dinghy sailing but also for a range of small leisure craft.
- 6.110 Visitor moorings have been placed at Culdaff and Moville for visiting boats as part of a series of strategic visitor moorings along the Irish west and northwest coastlines. Neither location has shelter from all wind directions and no other locations would provide sufficient shelter to extend the series of moorings. The moorings were last inspected in 2003.
- 6.111 Local boaters have requested that Limavady Council provide landing and short term berthing facilities at Magilligan beside the ferry pier to allow for visiting the Martello tower and Inn. This location is however very exposed to the prevailing wind, and indeed to winds from most quarters, so much so that the ferry is often disrupted.
- 6.112 Moville Boat Club organises or is involved in three main regattas, the Foyle regatta with Derry City Council, the Moville Regatta and the Shrove regatta. The club is also hosting the GP 14 Northern Open Championships in September 2004.

Rowing and Gig Racing

- 6.113 The past few years have seen something of a revival of gig racing around the coasts of Ireland, involving competitions between coastal villages. Rowing in various craft has become a part of a number of Celtic styled maritime festivals and there has been considerable to-ing and fro-ing between Brittany and the north of Ireland and the North of Ireland and Scotland. The replica curragh "*Columbkille*" has been rowed from Derry to Iona and around Ireland, and in doing so has stimulated local interest in the activity.
- 6.114 City of Derry Boating Club trains for competitive rowing from its base at the Prehen boathouse on the river Foyle. Rowing steps have been provided at this venue, which is shared with Foyle Paddlers Canoe Club.

Rafting

- 6.115 Rafting refers to the descent of rivers (normally white-water rivers) in rubber boats or rafts. There appears to be no rafting activity in either Lough Areas. (Improvised rafting activity is covered in 'miscellaneous' at the end of this section)

Surfing

- 6.116 Surfing takes place at Benone and Downhill where the beach is recommended as a beginner and improver surf area with regular waves and few hazards. Surfing also takes place at beaches along the North Inishowen coastline, including Culdaff and Portmore.
- 6.117 Surfboard and wetsuit hire is available from the Downhill hostel, which specialises in activity participants. Local advice is also available.

Water based Kite Boarding

- 6.118 Benone beach is a popular place for water-based kite boarding with people attracted by steady winds and plenty of space. No other beaches in the study areas provide suitable facilities.

Triathlon

- 6.119 Triathlon events normally involve a water phase which may be an indoor or outdoor swim , a canoeing or kayaking phase or both. As such they are often held adjacent to inland waters or the coast. Both Carlingford Lough and Lough Foyle areas have hosted triathlon events, including races at Camlough, Carlingford, and Benone (Sept 2004). Local athletes train and compete through Newry Triathlon Club, or through Triangle triathlon club in Limavady/Coleraine/Magherafelt

Miscellaneous activity

- A raft race takes place as a charitable event at Bunagee in July
- A raft race takes place at Malin in August
- Malin Head holds a sports day in August
- RIB raiding (fast cruising in rigid inflatable boats) and RIB rallies and RIB races are all increasingly popular. RIB raids from Isle of Man to Carlingford have been recorded. This sport/activity is likely to grow and has potential to deliver visitors to both Loughs as part of wider events such as round Ireland rallies, RIB races (possibly Lough Foyle), and attracting RIB raids from Scotland, Isle of Man and Wales

INFRASTRUCTURE

The appended pictorial account illustrates the main infrastructure for marine leisure and tourism in the Lough Agency area. The following summarises key infrastructure:

Infrastructure	Lough Foyle/Inishowen	Carlingford
Harbours	Greencastle Derry	Carlingford Warrenpoint (commercial area) Greenore (commercial only)
Quays	Malin Head (Portmore) Portaleen Bunagee Moville Carrickrory Magilligan point (ferry only)	Unnamed E of Táin Centre Newry Rostrevor Greencastle
Marinas	None	Carlingford (300 berth)
Slipways	Associated with all quays above plus Prehen Culmore River slipways to be added.	Cranfield (2) Carlingford Lough YC Killowen Outdoor Centre Warrenpoint (2 including foot ferry slip) Omeath Carlingford Marina Carlingford Harbour Dundalk and Carlingford Sailing Club The slipway at Greenore constructed since 1998 One of the many unique features of Greenore & Greencastle is the availability of deep water on the shore line 24 hours a day which is not available at any other point on the Lough.
Pontoons	City of Derry	Carlingford Marina Warrenpoint Albert Basin (rowing)
Canoe steps	Prehen (Derry) rowing steps serve same purpose. Drumragh Bridge Bloody Bridge (Camowen R) Omagh Playing fields Omagh town Plumbridge	None (rowing steps and pontoon on Newry Canal serve same purpose but too high for kayaks)

	Nr Newtownstewart Nr Mellon Country Inn	
Rowing steps	Prehen (Derry)	Quays Newry Ship Canal near Newry
Visitor moorings (swinging)	Culdaff (not in operation 2004) Moville (not in operation 2004)	None
Moorings used by local people (swinging)	Carrickarory Quigley's Point Culmore	Greencastle Rostrevor Warrenpoint Narrowwater Carlingford
Keelboat haul out	Moville	Carlingford Marina Dundalk and Carlingford Sailing Club Carlingford Lough Yacht Club
Boat repair/services/chandlery	McDonald Boats Greencastle	Carlingford Marina Dundalk and Carlingford Sailing Club
Ferries	Foyle ferry – Greencastle Magilligan	None (Foot passenger ferry from Warrenpoint to Omeath to be reinstated)
Ferry dry dock facilities	None	None
Boat trips	Toucan 1 Derry	None
Waterside walks	Dunagree (Shroove) to Kinnagoe Moville to Greencastle Greencastle Myroe (and other) levels Benone beach Views from Binevenagh	Cranfield to Greencastle Newry Canal Way Views from Táin Trail Views from Mourne Trail Views from Fathom and Rostrevor Forest/Kilbroney Park.

In reading the above summary of the audit, it should be noted that a large proportion of the infrastructure required for marine leisure and tourism is provided in the natural environment by rocks, beaches, rivers, and lakes. Windsurfing, canoeing, kayaking, surfing, sub aqua diving, dinghy sailing, wildlife watching etc can all be undertaken satisfactorily without built interventions.

7. EVALUATION OF MARINE TOURISM FACILITIES

7.1 The definition and audit have identified that there are a range of activities and infrastructure that appeal to a wide range of types of holidaymaker and visitor and therefore are capable of bringing visitors in volume to an area. The specialist activities have their own set of needs and are different from one another in the types of people they attract and the level of infrastructure they require.

7.2 In order to evaluate the findings of the audit, it is worth considering the main characteristics of an area that influence a consumer's decision to be a tourist there (apart from access and transport considerations). They can be summarised as:

- **Accommodation:** somewhere to stay for at least one night
- **Attractions:** things to see, visit, attend, look at (including scenery and the environment)
- **Activities:** things to do, learn, practice, watch
- **Facilities:** food and drink, entertainment, essential services
- **Mobility:** getting around easily
- **Information:** literature, signs, directions, guides
- **Value for Money:** feeling that it is worth spending the money on the experience (including the whole issue of quality).

7.3 As far as marine tourism is concerned, the range of fundamental elements or characteristics can be classified under these headings, as follows:

- **Accommodation:** hotels, guesthouses, B&Bs, self-catering, hostels, caravans, camping, and activity centres/schools.
- **Attractions:** seascape, landscape, scenery, viewpoints; special centres (maritime heritage, sea life); events and festivals.
- **Activities:** from the full list in the definition of marine tourism, including coastal walking, scenic driving, all forms of boating, and more specialist pursuits.

- **Facilities:** including ports, harbours, slipways, berthage, moorings, boat hire, seafood restaurants, and pubs, hire services.
- **Mobility:** modes and means of internal.
- **Information:** way marking, literature on the area, signs, directions, guides
- **Value for Money:** this can only be assessed by visitor surveys or by the relative popularity of different sites, experiences, services, etc.
- **Absence of aspects that detract from the experience or disgust** – e.g. polluted waters, poor sewage arrangements, and poor quality urban environments.

7.4 As far as **specialist activity participants** are concerned, the services listed above for more general tourists and visitors apply but there are additional requirements that are activity specific. The needs of beginner participants in specialist activities also differ from those of more experienced participants, so there is considerable segmentation.

The following list of requirements is intended to identify some of the additional requirements of specialist activity participants:

- The area has a **good reputation/track record** for the activity concerned and a suitable natural resource for the activity. Specialist activity participants choose the best areas for their holidays, not just areas where their activity is possible. Recommendations from tourism interests in the area are rarely regarded, whereas specialist websites and publications, and word of mouth referral within an activity club or network are frequently sourced. Examples of specialist publications used by activity participants include ‘Stormrider’s guide to Europe’ (surfing), the Dive Ireland website, Irish Cruising Club pilot books to the coasts of Ireland.
- The availability of **suitable specialist hire equipment** particularly if the participant arrives by air and cannot bring bulky equipment (e.g. yacht charter, surfboards, sea kayaks, dinghies, dive equipment, fishing rods).
- **Opportunities to learn more and improve performance** e.g. the possibility of joining a course or guided experience where the other participants are at the same level of ability/experience.
- **Opportunities to tap into local knowledge** required to use the area or facility safely (e.g. local tide tables and variations, local currents, best shore fishing areas, bait opportunities, appropriate scale activity specific maps and guides)

- Availability of **detailed activity information prior to travelling** for planning purposes (charts, pilots, tidal information, weather, activity friendly accommodation, public transport, reputation)
- Opportunities to **replace, refill, maintain, mend equipment** in the area (chandlery, diving tank refills and specialist gases, sail repair)
- **Appropriate activity accommodation provision** catering for specific needs including: equipment storage for valuable items, accessibility from the sea, drying rooms, bait storage, local knowledge or ability to refer to someone else. Accommodation type varies by activity and within activity segments but can include moorings, marinas, hostels, B&B, guesthouse hotel and camping.
- **Public transport** – is important to some activity sectors e.g coastal walking which is essentially linear

7.5 The following table summarises the findings of the audit in terms of an evaluation of each area's capacity or ability to meet the requirements of marine tourism consumers.

7.6 In addition to the constituent elements outlined above, for marine tourism to thrive, it is essential that a co-ordinated approach be adopted in the development and marketing of marine tourism products.

Table 7.1 Evaluation of Findings of the Audit

Key Component	Carlingford	Foyle
Accommodation	<ul style="list-style-type: none"> • Overall range is limited • Largest hotel in Newry (51 rooms) • Some good links with marine tourism in Carlingford Village • Good caravan/camping provision but large/busy/formal • Very limited self-catering • Little specialist activity accommodation (apart from training/adventure facilities) • Little packaging of activities and accommodation. 	<ul style="list-style-type: none"> • Good hotel provision in Derry and immediate area • Some caravan/camping provision (especially at Benone and some Innishowen locations) • No obvious links with marine tourism • Very limited self-catering • Little specialist activity accommodation • Little packaging of accommodation and activities
Attractions	<ul style="list-style-type: none"> • The scenery is a key attraction • A few viewpoints • Carlingford Village a place of interest • No visitor centres (maritime themes) • Good events programme • Plans for big event • Inland catchment waters small and of limited appeal 	<ul style="list-style-type: none"> • Most scenic parts on north Inishowen coast, including views over the Foyle • A few viewpoints • Museums with maritime themes • City attractions of Derry • Developing events programme • Plans for big event • Major attractive inland waterways • Malin Head totally understated (a lost opportunity for tourism)
Activities	<ul style="list-style-type: none"> • Coastal walking underdeveloped • Walks linked to Tain and Mourne • Cranfield good for watersports but congested • Scenic/pleasure trips underprovided • Few visiting craft • Limited wildlife watching • Potential to increase sea angling, diving, eco-tourism trips and adventure boating • Important centre for waterskiing and jetskiing (but some conflict) • Lot of powerboating • Could be more motorboat cruising • Good for sailboarding (off Warrenpoint and Carlingford Harbour) • Increasing interest in canoeing/kayaking (sea and canal) • Potential for major multi-day sailing event • Potential to develop further a reputation for seafood and eating out/local produce. 	<ul style="list-style-type: none"> • Coastal walking underdeveloped • Benone good for beach activities • Inishowen 100 drive low-key/difficult • Scenic/pleasure trips underprovided • Growing number of cruise ship visits • Inishowen sea-cliff climbing • Major centre for sand yachting etc • Important wildlife watching areas in Limavady and north Inishowen • Wrecks an asset for diving and angling • Potential to increase sea angling, diving, eco-tourism trips and adventure boating (probably more so than Carlingford) • Controlled water-based activities at Benone • Could be more powerboating and motorboat cruising off Derry • Good for sailboarding (at Benone and Culdaff) • Surfing off Benone and north Inishowen • Increasing interest in canoeing/kayaking (sea and rivers)
Activity services	<ul style="list-style-type: none"> • No hire facilities for any equipment 	<ul style="list-style-type: none"> • Hire facilities for surfboards/windsurfers but nothing

	<ul style="list-style-type: none"> • Yacht charter available-skippered and bare boat • Dive services nearby in Kilkeel • Opportunities for specialist equipment purchase limited • Activity summer schools and training programmes • Powerboat schools • Activity centres • Competitions and events 	<p>else</p> <ul style="list-style-type: none"> • No yacht charter • Opportunities for specialist equipment purchases • Powerboat school • Training courses at Creggan CP • Competitions and events
	<p>Fishing Gear: The village shop in Greenore "Greenore Co-Op" for many years has been hiring and selling fishing tackle to the learner and the "good weather beach" fisherman.</p> <ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
Facilities	<ul style="list-style-type: none"> • Newry for urban facilities/services • Cranfield beach facilities sparse • One marina and 4 boat clubs (250 keel boats) • But lack of sailing destinations and visitor moorings • Four outdoor centres but predominantly providing for children/locals 	<ul style="list-style-type: none"> • Derry for urban facilities/services • No marina • Few moorings/berths • Potential to grow marine events tourism based on new facilities in Derry • Potential for Omagh to Derry canoe trail
Mobility	<ul style="list-style-type: none"> • No circular route • Tours maps/leaflets • No ferry • Area in two halves • Public transport does not serve activity sites 	<ul style="list-style-type: none"> • Foyle Ferry a positive asset that encourages circulation • Innishowen 100 Map but signing confusing • Foyle Bridge available if visitors want to avoid city traffic • Public transport does not serve activity sites.
	<ul style="list-style-type: none"> • Good website but no area-wide literature • Lack of waymarking, scenic route signage, on-site interpretation • Poor specialist activity literature and guidance 	<ul style="list-style-type: none"> • No area-wide literature • Limited waymarking, scenic route signage, on-site interpretation • Poor specialist activity literature and guidance.
Organisation	<ul style="list-style-type: none"> • Absence of vision/clear direction and leadership • Lack of co-ordination between agencies and between public/private sector 	<ul style="list-style-type: none"> • Absence of vision/clear direction and leadership • Lack of co-ordination between agencies and between public/private sector
Linkages	<ul style="list-style-type: none"> • Cross border linkages are improving but still poor • Lack of product familiarisation programmes for product providers in each jurisdiction • Absence of co-ordinated approach to marketing to establish identity of area 	<ul style="list-style-type: none"> • Cross border linkages are improving but still poor • Lack of product familiarisation programmes for product providers in each jurisdiction • Absence of co-ordinated approach to marketing to establish identity of area

8. SWOT ANALYSIS

- 8.1 This section draws together all of the findings described so far and uses them to identify the strengths, weaknesses, opportunities and threats that apply to the development of marine tourism in the two Loughs Areas.

CARLINGFORD: STRENGTHS

- **Attractive to Day Visitors**

- 8.2 The Lough and its environs already attract relatively large numbers of people who are interested in a range of active and passive leisure pursuits.

- **Scenic Appeal**

- 8.3 The visual attractiveness of the area is recognised as an asset that complements the Mourne and Cooley mountains area (in particular) and makes it a popular destination for scenic driving, sightseeing and general appreciation of the landscape and seascape (eg. places like Rostrevor, Kilbroney, the Cooley Peninsula).

- **Accessibility**

- 8.4 The area is on or adjacent to the main route between Dublin and Belfast and, as such, enjoys good road and rail accessibility (which is gradually improving). Within a 1.5 hour drive of Newry, there is a population of 2.5 million.

- **Boating Activity**

- 8.5 Activities involving the use of boats (especially sailing, diving and sea angling) are well established in the area and supported by one major marina; assisted by good charts, pilots and sailing directions; and served by excellent safety systems.

- **Marine Leisure**

- 8.6 Other more specialist marine leisure activities are strongly established in the area, especially around Cranfield and associated with adventure centres (again with good safety arrangements in place).

- **Environmental Management**

- 8.7 Careful management and monitoring procedures, including zoning of the Cranfield area, are already in operation (and reflected in a Blue Flag award and nature conservation designations).

- **Attractive Settlements**

- 8.8 Newry has become more attractive to visitors in recent years and, as its accommodation base develops, must be regarded as a source of market interest in marine tourism activities in the Carlingford Lough area. Similarly, Carlingford Village is becoming increasingly attractive for short breaks and day visits.

- **Existing Events**

- 8.9 The area already stages some well-known events that attract people into the area.

- **Seafood Economy**

- 8.10 Local eating-places are renowned for their menus of seafood that has been landed at Carlingford Lough.

- **Development Interest**

- 8.11 The level and range of interest in developing marine tourism in the area is also regarded as a significant strength, especially as this is coming from cross-border interests and the private sector.

CARLINGFORD: WEAKNESSES

- **Not Integrated Area**

- 8.12 The Carlingford Lough area is not being developed or promoted as a natural, recreational and commercial entity. Regulations and by laws are different on each side of the border. It is, therefore, under-achieving in terms of its potential as a marine tourism destination. It needs integrated development, management and marketing.

- **Limited Circulation**

- 8.13 There is no strong physical link between one side of the Lough and the other (eg. a ferry) and limited opportunity for cross-border boating trips and poor provision of waterside walks.

- **Environmental Problems**

- 8.14 There are certain parts where poor visual quality detracts from the area's overall attractiveness. Particular blackspots are the appearance and port environments of Warrenpoint and Greenore, but these may be regarded as an unavoidable aspect of marine locations.

- **Infrastructure Limitations**

- 8.15 At certain points, marine tourism and leisure activity is poorly served, as illustrated in detail by the audit. As a result, the benefits of such activity are not being spread effectively throughout the area.

- **Pressure from Tourism**

- 8.16 The popularity of certain locations is placing pressure on their continued attractiveness due to congestion and conflict between activities and visitors (eg. Cranfield, Carlingford Village, density of caravan parks).

- **Limited Leisure Opportunities**

- 8.17 There are few "hire and come and try it" opportunities, little encouragement to casual visitors and the activity packages on offer are mainly for children or not made particularly attractive to the adult market.

- **Lack of Baseline Data**

- 8.18 Planning for the future is hindered somewhat by the lack of information on users, their activities and their priorities.

CARLINGFORD: OPPORTUNITIES

- **Growing Demand**

- 8.19 A major opportunity for the area is the growth in demand for leisure-based activity tourism (as outlined earlier) and the recognition that this has been given by tourism bodies on both sides of the border. Clearly, marine tourism is regarded as a growth sector, particularly if it is associated with short break/special interest offers. This area is ripe for that form of growth, provided there are integrated efforts to improve the infrastructure, marketing and overall management.

- **Proximity to Markets**

- 8.20 The area's ability to capitalise upon the growth in demand will be assisted significantly by its accessibility and its proximity to the main domestic and UK markets.

- **Cross-border Area**

- 8.21 There is the opportunity to make a selling point out of the fact that this is a cross-border area (regarded as an element of uniqueness amongst some visitors). This could be strengthened by cross-border partnerships between accommodation providers, activity pursuits specialists and other tourism-related facilities.

- **Stronger Events**

- 8.22 The proposed Carlingford Lough Festival presents the opportunity to raise the area's profile significantly and other similar events targeted at tall ships and other visiting craft will add interest in the area at various times of the year.

- **Newry Canal**

- 8.23 The Newry Ship Canal is an underused resource in the area and presents the opportunity to create closer ties between the City (and its visitors) and the Lough itself. Also, if the proposals to re-open the Newry Canal to Lough Neagh eventually come to fruition, then there is huge potential for Carlingford Lough as an important terminal point.

- **Cross-border Funding**

- 8.24 As has been discussed in the Context Review, the creation of the Loughs Agency is regarded as a great opportunity to plan, develop and market the marine tourism resources of the area, irrespective of boundaries. It is also assumed that the Loughs Agency will be given special cross-border funding to do so.

- **Tourist Board Involvement**

- 8.25 As a cross-border area, an opportunity exists to involve Tourism Ireland, the NITB and Fáilte Ireland in the implementation of future plans for marine tourism in the area.

CARLINGFORD: THREATS

- **Competition**

- 8.26 Many areas are already responding to or gearing up to the growth in demand for marine tourism, especially in relation to activity packages (eg. Killarney, Galway, West Clare, Scotland). This means that Carlingford must at least match the quality on offer in these other areas or it needs to develop some form of uniqueness that will make it stand out as a different place to go for marine tourism.

- **Incorrect Perceptions**

- 8.27 There may still be lingering doubts about the image of this border area, which will prevent it from ever having a competitive edge over other areas. This could relate to water quality on the east coast and not just the issue of security.

- **Civil Unrest**

- 8.28 Although the risk of a worsening political situation in Northern Ireland appears to be diminishing, it must remain as a possible threat in any analysis of this type. This is particularly the case in border regions.

- **Lack of an Integrated Approach**

- 8.29 The threat is that if marine tourism in the area is not developed as an area-wide activity then there is a danger that there will be over-concentration on Cranfield and Carlingford, without active management and the development of full services on an area-wide basis.

FOYLE: STRENGTHS

- **Attractiveness to Day Visitors**

- 8.30 As in the case of Carlingford, the Foyle area has a number of places that are already popular with day visitors, especially Benone, The City of Derry/Londonderry, the coastal settlements and beach areas of Inishowen and Malin Head. This is a strength upon which marine tourism of the future can be developed.

- **The City of Derry/Londonderry**

- 8.31 The City's improved image, commercial regeneration and emergence as a tourism destination are significant strengths for the development of tourism in the wider area. In particular, its growth as a destination for city breaks and visiting cruise ships means that there will be

growing demand for activities associated with Lough Foyle and its marine hinterland (eg. taking a boat trip or trying out an activity at Benone as part of a city break). Of prime importance are the growing base of hotel accommodation in the City and the continuing marketing efforts of the Derry Visitor and Convention Bureau and Cruise North West.

- **Accessibility**

- 8.32 The Foyle area does not have the same level of accessibility advantages as Carlingford. However, it is served by Derry City Airport, which is becoming increasingly popular for low-cost direct flights. The introduction of Magilligan-Greencastle ferry service has also improved access within the Foyle area.

- **Proximity of Other destinations**

- 8.33 The area's location between Donegal and the Causeway Coast (including the Giant's Causeway), two popular tourism areas, is regarded as a strength in terms of the number of existing and potential day-visiting tourists on the doorstep.

- **Beaches**

- 8.34 The quality of the area's unspoilt beaches is an important strength, especially Benone with its range of well-managed activities that are known to draw visitors from far and wide. The Innishowen area also has a number of very attractive beaches, that are associated more with bays and coves, rather than as strands.

- **Scenic Driving Opportunities**

- 8.35 The area already has part of the Inishowen 100. This is now complemented by the Foyle Ferry, which encourages drivers to enjoy both sides of the Lough. The proposed North Atlantic Trail, to be developed and promoted by the NITB in association with Causeway Coast and Glens, will also attract touring visitors into the Foyle area. Causeway Coast & Glens also intend developing a marine heritage trail.

- **The Foyle Ferry**

- 8.36 This has raised the area's profile, facilitated movement, generated interest and extended connections with other neighbouring tourism destinations.

- **Malin Head**

- 8.37 As the most northerly point on the island of Ireland, this is a unique feature of the Foyle Area. It is also reputed to be the sunniest place in Ireland. As well as “achievement seekers,” it attracts people interested in walking, birdwatching, fishing, swimming, photography, painting and nature generally. It is a strength but also an opportunity because it has potential to act as a much better attraction for tourists.

- **Marine Wildlife**

- 8.38 Lough Foyle is well known for the birdlife it accommodates and this already attracts visitors. It is also home to a range of aquatic wildlife that are, as yet, relatively undiscovered by tourists due to the lack of eco-tourism boating excursions.

- **Diving Waters**

- 8.39 The wrecks in the Lough Foyle and off the north coast of Inishowen are regarded as a major strength for further development of sub aqua tourism.

- **Sea Angling**

- 8.40 Similarly, the area’s sea angling resources are regarded as under-used for marine tourism activity and, as such, a strength that will contribute towards its development.

- **Boating**

- 8.41 The opportunities for boating in Lough Foyle are also relatively underused and this is regarded as a strength for the development of marine tourism, especially as there are excellent safety systems and navigational aids already in place.

- **Canoeing and Kayaking**

- 8.42 These activities are relatively well established in the Foyle catchment area and provide a foundation upon which to build further activity tourism offers.

- **Existing Events**

- 8.43 The local regattas are known to attract visitors. However, the main strength in this regard is the commitment to work towards larger crowd-pulling events, such as the Celtic Maritime Festival.

- **Visitor Attractions**

- 8.44 As well as museums and visitor centres directly associated with marine or riverine heritage, the area has a range of other attractions that help to build up its appeal to tourists, even if they are mainly interested in marine leisure activities (eg. The Tower Museum, the Millennium Forum, Roe Valley Country Park).

- **Development Interest**

- 8.45 As with the Carlingford Area, the cross-border and private interest in developing marine tourism is regarded as a strength for its future in the Lough Foyle area.

FOYLE: WEAKNESSES

- **Limited Scenic Quality**

- 8.46 Some of the Lough Foyle area is regarded as not having the same quality of scenic appeal overall as the Carlingford area. It does, however, have some very attractive features and viewpoints. Nevertheless, there are some quite dominant industrial structures.

- **Not an Integrated Area**

- 8.47 As with Carlingford, the Foyle area is split between two different legislations. Regulations and by laws are different on each side of the border. Thus, although there may be strong interest in cross-border co-operation, there remains the problem of turning the required integrated planning approach into reality.

- **Limited Circulation**

- 8.48 The Inishowen 100 is promoted as a scenic drive but its interpretation is limited and, overall, the area lacks an integrated set of viewpoints and clear signage that would be required to encourage visitors interested in sightseeing drives. Similarly, the availability of paths for coastal walking is limited.

- **Availability of Sea Angling Product**

- 8.49 Many visitors have difficulty in accessing the sea angling product on the Foyle. While some of the 'ingredients' are in place to offer good quality sea angling (ie. quality of fishing, accommodation, etc) further investment is required particularly in boats and equipment. Co-ordination is then required to ensure that the constituent ingredients are put together as an appealing and accessible product.

- **Suitability for Boating**

- 8.50 The Foyle, due to currents, tricky winds and shallows, is not considered to be exceptionally attractive for boating. The better waters are out beyond Magilligan Point. This weakness may be overcome to some extent by the opportunities for boating associated with sea angling, diving and eco-tourism.

- **Diving Waters**

- 8.51 Facilities for visiting divers are poor and require investment.

- **Infrastructure Limitations**

- 8.52 Perhaps as a result of the above weakness, the provision for boating on Lough Foyle is considered to be considerably less than would be expected. Overall, there is a serious lack of focal points for boating, marinas and sheltered moorings.

- **Over-development and Conflicts**

- 8.53 As with Carlingford, the Foyle area has certain places where their popularity is endangering their quality. Specific examples would include the density in caravan parks, beach parking at Benone, conflicts between different activities/users and the difficulty of balancing marine tourism activity with conservation interests and designations.

- **Lack of Baseline Data**

- 8.54 This constraint upon future planning applies to the Foyle Area as much as it does Carlingford.

FOYLE: OPPORTUNITIES

- **Growing Demand**

- 8.55 The same general market growth applies to both Lough Areas. Both should be ideally placed to cater for growth in demand for marine-related tourism. However, the Lough Foyle area has a wider range of growth opportunities available to it, given that its urban focus is becoming increasingly attractive for city breaks and visiting cruise ships; its interior is part of the Sperrins area which attracts visitors interested in countryside pursuits; and it has neighbouring areas that are already well-established tourism destinations (ie. Donegal and the Causeway Coast and Glens). These factors provide a strong base upon which to develop marine tourism in the Foyle Area.

- **More Cruise Ship Visits**

8.56 This year Derry will welcome 7 visiting cruise ships, while Invergordon in Scotland is expecting 41. On that basis alone, there is evidence of potential growth.

- **Cross-border Area**

8.57 As in the case of Carlingford, the same opportunity arises in being able to sell this as a cross-border area. This is considered to have an element of uniqueness that might tip the balance in favour of either area when a potential tourist is considering the range of places available. As far as the Foyle Area is concerned, there is also the selling point of Derry's regeneration and new image.

- **Under-used Resources**

8.58 As described in the analysis of strengths, some of the area's resources are relatively under-used for marine tourism. This means that opportunities are there to increase their use and to build up marine leisure business. This applies mainly to the opportunities to introduce more boat trips (pleasure, eco-tourism, diving and sea angling); the prospects of improving internal circulation through improved scenic route provision and coastal walkways; and the development of further canoeing opportunities.

- **Commitment to Events**

8.59 Similarly, there are opportunities to introduce larger and more frequent events into the area. This would have to be accompanied by infrastructure improvements to ensure that the provision and quality of facilities meet event requirements.

- **Cross-border Funding**

8.60 As discussed above under Carlingford Opportunities, the creation of the Loughs Agency is regarded as a great opportunity to plan, develop and market the marine tourism resources of the area, irrespective of boundaries. It is also assumed that the Loughs Agency will be given special cross-border funding to do so.

8.61 As a cross-border area, an opportunity exists to involve Tourism Ireland, the NITB and Failte Ireland in the implementation of future plans for marine tourism in the area.

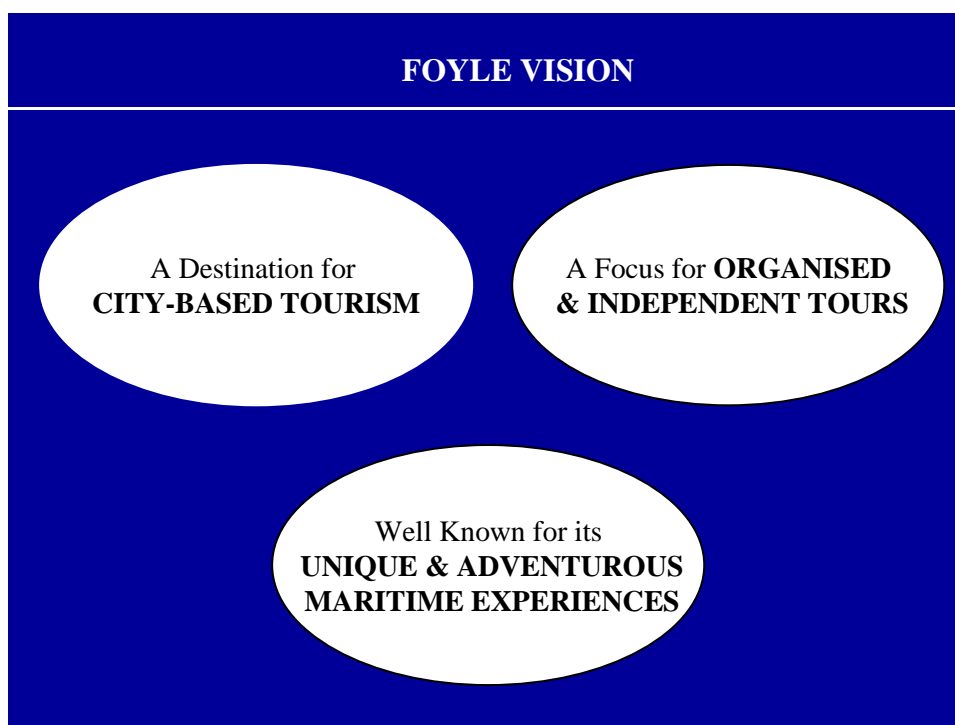
FOYLE: THREATS

8.61 The four main threats that were identified for Carlingford also apply to the Foyle:

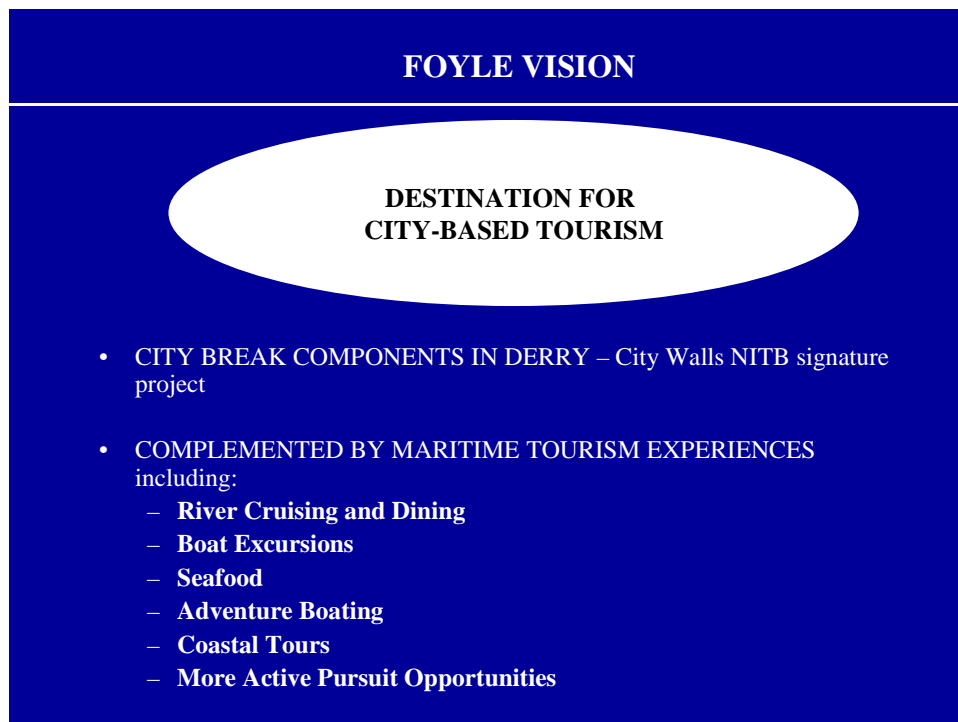
- Competition
- Incorrect Perceptions
- Civil Unrest
- Lack of an Integrated Approach

9. VISION AND STRATEGY

- 9.1 Following full discussion of the SWOT analysis at consultation sessions, the consultancy team's overall vision is that the two areas will become established as separate marine tourism destinations that are distinctive from each other and from other competitive areas of Ireland.
- 9.2 This chapter covers the visions and the associated strategic aims for the two areas. Chapter 10 sets out the actions required to achieve these strategic aims. In some cases, there are aims and actions that are common to both areas. However, these are repeated for both so that two Action Plans can be adopted and pursued as separate entities.



- 9.3 The vision is that in 10-15 years time, Lough Foyle and its maritime hinterland will be well established as a destination for city-based tourism, as a focal point for organised and independent tours and, especially, as a part of the island of Ireland that is well known for its unique and adventurous maritime experiences.



- 9.4 A Significant Destination for City-based Tourism:** focused on Derry and its surrounding area, where the usual city break components (accommodation, entertainment, food and drink, heritage attractions, tours, shopping, etc) will be complemented by a range of appropriate marine tourism experiences, such as river cruises and dining; boat excursions; adventure boating; coastal tours; and more active pursuit opportunities.



- 9.5 A Focal Area for Organised and Independent Tours:** including cruise ship visits; coach tours; special interest field trips; explorations on the North Atlantic Trail and the North Donegal Visitor Trail; other independent tours (car-borne, motorcycles, cycles); and day visits by tourists staying in the significant adjoining tourism destinations of Donegal and the Causeway Coast. These touring visitors will be attracted into the area for at least one night or for the best part of a day.

FOYLE VISION

WELL KNOWN FOR UNIQUE & ADVENTUROUS EXPERIENCES

- FOR SPECIALISTS, LEARNERS & ACHIEVEMENT SEEKERS: including
 - Sea Angling
 - Diving
 - Wildlife Watching
 - Adventure Boating
 - Malin Head (Extremity Tourism)
 - Long-distance walking/cycling
 - Rock Climbing
 - Other thrilling activities

9.6 Well known for Unique and Adventurous Experiences: including sailing/boating (including teaching); cruising; sea angling; diving; wildlife watching; and other adventure boating, supported by a new marina on the eastern coast of Inishowen; much extended berthage at Derry's waterfront; improved accommodation at Culmore; and new boating facilities at Bunagee (Culdaff).

9.7 An Attractive Area for Achievement Seekers: especially visitors to Ireland's most northerly point (Banba's Crown at Malin Head); long distance walkers/cyclists; those who want to enjoy the thrills of more adventurous activities (eg RIB trips, rock climbing, seeing the wrecks); and wildlife spotting.

The variety of experiences will be a major strength.

9.8 OTHER OPPORTUNITIES TO SUPPORT THE VISION

A Centre of Excellence for Beach-based Activity: centred at Benone and including well-managed activities on the beach, in the water (surfing, sailboarding, waterskiing, jetskiing) and in the nature reserves (especially birdwatching). Complementary to this will be Magilligan Strand, Dunagree Point, Kinnagoe Bay, Tremone Bay and Culdaff which will focus on beach enjoyment and lower-key water-based activities from the beach (eg. bathing, snorkelling, boarding, kayaking).

A Strong Base for Multi-Activity Tourism Breaks: in which the existing base of hotel accommodation in the area (which will continue to improve) will be supported by a much wider range of serviced and un-serviced accommodation (including more guest houses, B&Bs, self-catering and more specialist overnight facilities). The establishment of tourism breaks by these accommodation providers will be the result of close co-operation with a “cluster” of other businesses and organisations in the area (eg. activity organisers and tutors; boat owners; equipment hirers and repairers; food and beverage specialists; visitor attractions; safety bodies; event organisers; and promoters of tourism).

A Well-known Maritime Events Venue: involving a programme of exciting and unique events throughout the year.

An Important Source of Tourist Visits to Surrounding Areas: including cruise ship visitors and other tourists based in Derry and Lough Foyle accommodation, taking trips out (independently or on tours) to other parts of Donegal, the Causeway Coast and Glens and the Sperrins.

The Result of Cross-border Co-operation: led by the Loughs Agency working in association with its partners from the public and private sectors.

An Exemplar of Sustainable Tourism Development: whereby development and promotion are part of an ongoing approach that is highly respectful of the need to balance tourism activities with the long-term sustainability of the natural and cultural resources of the area.

9.9 STRATEGIC AIMS FOR THE LOUGH FOYLE AREA

It is proposed that this vision is achieved by a strategy for the Lough Foyle Area with the following aims:

- **LOUGHS AGENCY ADVANTAGE** - To take full advantage of the Loughs Agency's position as a body that can assist the development and promotion of marine tourism on and around Lough Foyle, on both sides of the border.
- **WORKING WITH PARTNERS** - To take forward an agreed version of this vision and strategy as the basis for a programme of action for the Loughs Agency, to be implemented in association with its partner bodies from the public and private sectors.
- **INTER-AGENCY MANAGEMENT STRUCTURE** - To develop and adopt an inter-agency integrated management structure for Lough Foyle that will provide a medium (1) to ensure that this Marine Tourism Strategy is implemented in a sustainable and well-managed manner; (2) to establish a sustainable relationship between tourism and leisure, fishing and aquaculture; (3) to maintain the nature conservation interest and biodiversity of the Lough; (4) to assist with the management of user conflicts; and (5) to ensure adherence to bye laws, regulations and other legislation.
- **BOAT-BASED ACTIVITIES** - To achieve a substantial improvement in the availability, accessibility and quality of boat-based activities in Lough Foyle (including new infrastructure; permanent arrangements for dredging and maintenance; and actions to minimise hazards)
- **BEACH-BASED ACTIVITIES**- To enhance the quality and availability of beach-based activities in the most appropriate locations in the Lough Foyle Area.
- **ACHIEVEMENT SEEKERS** - To develop and promote the area's attractiveness for "achievement seekers."
- **CITY-BASED TOURISM** - To contribute to the development of the area's city-based tourism product.
- **ACTIVITY TOURISM BREAKS** - To improve and consolidate the area's position as a destination for activity tourism breaks, by encouraging the development of a fully integrated set of services for activities in key localities (ie. developing co-operation amongst service providers in "clusters").

- **EVENTS** - To establish a reputation for the area as a venue for exciting and unique events.
- **ORGANISED AND INDEPENDENT TOURS** - To help to establish the Lough Foyle Area as a focal point for organised and independent tours.
- **LINKAGES** - To develop beneficial links between the core maritime area, other parts of the Foyle catchment and further afield, by encouraging linkages, interaction and the spread of tourism activity.
- **DEVELOP EXCELLENCE** - To provide a demonstration in excellent marine leisure provision and management.

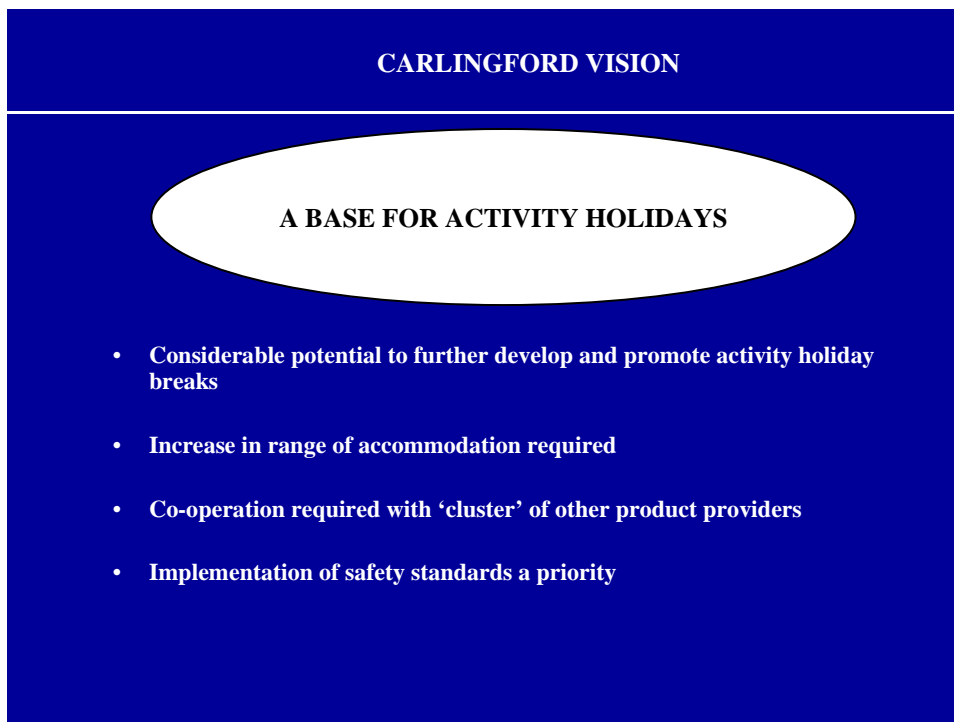
9.10 Specific actions required to realise these aims are described later in chapter 10.

THE VISION FOR THE CARLINGFORD LOUGH AREA

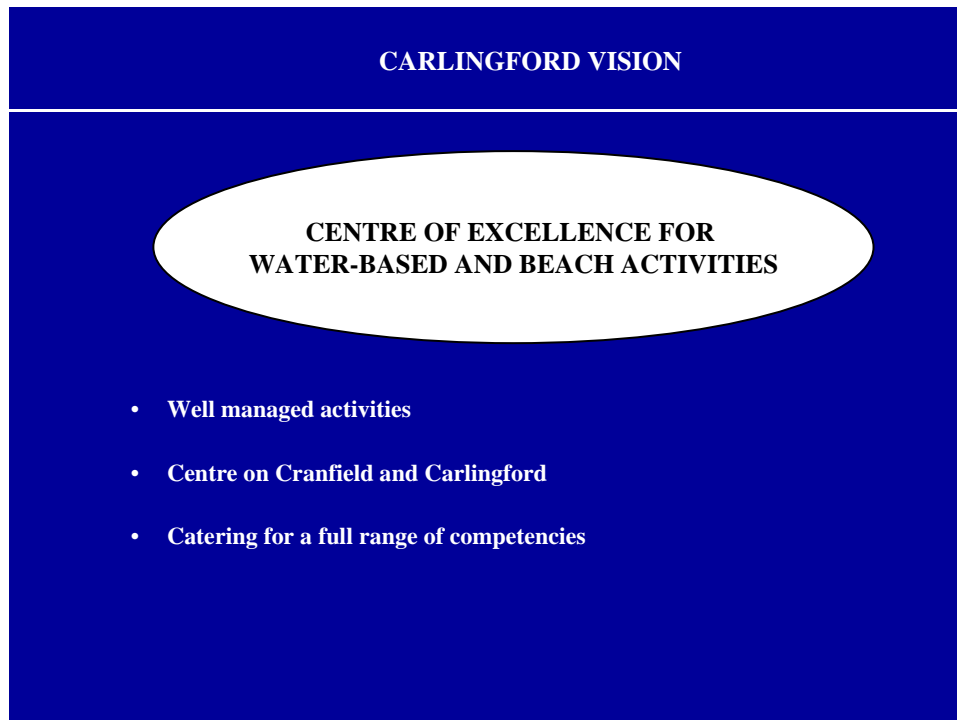


9.11 After the next 10-15 years, the vision is that the Carlingford Lough Area will be well established as a central part of “the outdoor playground of Ireland.” While it will continue to function (but more

effectively) as a scenic location for seaside holidays and touring, its future key role is expected to focus on its ability to cater for a wide-range of outdoor activities (within and outside the catchment). More specifically, it is envisaged that the area will be:



- 9.12 **A Base for Activity Holidays Breaks Centred Locally and in the Wider Area:** some existing accommodation providers offer activity breaks but the vision assumes that there is considerable potential to formalise such offers and to increase the number sold. This would have to be accompanied by a substantial increase in the range of accommodation available. Also, the establishment of tourism breaks by these accommodation providers will be the result of close co-operation with a "cluster" of other businesses and organisations in the area (eg. activity organisers and tutors; boat owners; equipment hirers and repairers; food and beverage specialists; visitor attractions; safety bodies; event organisers; and promoters of tourism).



- 9.13 **A Centre of Excellence for Water-based and Beach Activity:** centred at Cranfield and Carlingford and including well-managed activities on the beach and in the water (sailing, cruising, sailboarding, waterskiing, jetskiing). In particular, the area is expected to cater for the full range of competency in these activities (ie. learning, improving, perfecting, specialising and competing).



- 9.14 **A Popular Port-of-Call and Boating Base:** attracting significantly more visiting boats and boating activity in the Lough, as a result of the development of a marina on the eastern shore and the addition of mooring/berthing provision in other parts. It is also expected to become the focal point of at least one major annual yachting event.

9.15 Other opportunities to support the vision

A Focal Point for Organised and Independent Tours: including coach tours; special interest field trips, other independent tours (car-borne, motorcycles, cycles); and day visits by tourists staying in the significant adjoining tourism destinations of Counties Armagh, Louth and Down

A Well-known Maritime Events Venue: involving a programme of exciting and unique events throughout the year.

An Important Source of Tourist Visits to Surrounding Areas: including tourists based in the area's accommodation taking trips out (independently or on tours) to other parts of Newry and Mourne and County Louth.

The Result of Cross-border Co-operation: led by the Loughs Agency working in association with its partners from the public and private sectors.

An Exemplar of Sustainable Tourism Development: whereby development and promotion are part of an ongoing approach that is highly respectful of the need to balance tourism activities with the long-term sustainability of the natural and cultural resources of the area.

9.16 STRATEGIC AIMS FOR THE CARLINGFORD AREA

As in the case of the Lough Foyle Area, it is proposed that this vision for the Carlingford Lough Area will require achievement of the following strategic aims:

- **LOUGHS AGENCY ADVANTAGE** - To take full advantage of the Loughs Agency's position as a body that can assist the development and promotion of marine tourism on and around Carlingford Lough, on both sides of the border.
- **WORK WITH PARTNERS** - To take forward an agreed version of this vision and strategy as the basis for a programme of action for the Loughs Agency, to be implemented in association with its partner bodies from the public and private sectors.

- **INTER-AGENCY MANAGEMENT STRUCTURE** - To develop and adopt an inter-agency integrated management structure for Carlingford Lough that will provide a medium (1) to ensure that this Marine Tourism Strategy is implemented in a sustainable and well-managed manner; (2) to establish a sustainable relationship between tourism and leisure, fishing and aquaculture; (3) to maintain the nature conservation interest and biodiversity of the Lough; (4) to assist with the management of user conflicts; and (5) to ensure adherence to bye laws, regulations and other legislation.
- **BOAT-BASED ACTIVITIES** - To achieve a substantial improvement in the availability, accessibility and quality of boat-based activities in Carlingford Lough (including new infrastructure; permanent arrangements for dredging and maintenance; and actions to minimise hazards).
- **BEACH-BASED ACTIVITIES** - To enhance the quality and availability of beach-based activities in the most appropriate locations in the Carlingford Lough Area.
- **ACTIVITY HOLIDAYS** - To improve and consolidate the area's position as a destination for activity tourism breaks by encouraging the development of a fully integrated set of services for activities in key localities (ie. developing co-operation amongst service providers in "clusters").
- **EVENTS** - To establish a reputation for the area as a venue for exciting and unique events.
- **TOURING FOCAL POINT** - To help to establish the Carlingford Lough Area as a focal point for organised and independent tours.
- **LINKAGES** - To develop beneficial links between the core maritime area, other parts of the Carlingford catchment and further afield, by encouraging linkages, interaction and the spread of tourism activity.
- **EXCELLENCE IN MARINE LEISURE** - To provide a demonstration in excellent marine leisure provision and management

9.17 Specific actions required to realise these aims are described later in chapter 10.

10. ORGANISATIONAL STRUCTURE

- 10.1 The expansion of marine tourism and leisure activities in the Carlingford Lough and Lough Foyle areas will require a careful and competent management approach to ensure that they are eminently attractive to the target markets, safe and sustainable. It must also avoid leading to conflict either between different activities or between activities and other operations such as shipping, fisheries or aquaculture on the loughs.

It is also clearly evident that co-ordination will be required between North and South, between various agencies of state, and between these state agencies and the private and voluntary sectors.

The Loughs Agency has a pivotal role to play in the implementation of the Marine Tourism and Leisure Strategies for the Carlingford Lough and Foyle Lough areas. However, the involvement of other agencies with complementary skills and resources will be necessary in order to bring this process forward.

Critical in this regard will be the stakeholder group and the two area sub groups each of which will play a key role in supporting the Loughs Agency (Management Board) and the dedicated management team that will be put in place to implement marine tourism and leisure policies.

Key in regard to this will be the necessary high profile public consultation of the document to ensure awareness and buy in from the plethora of stakeholders and bodies charged with a statutory responsibility for marine Tourism within the two catchments.

The Loughs Agency is an Agency of the Foyle, Carlingford and Irish lights Commission which was established by the British Agreement Act 1999 and the North South Co-operation (Implementation Bodies) (Northern Ireland) Order 1999. It has subsumed the functions of the Foyle Fisheries Commission (a cross-border body established in 1952 to conserve manage and protect the fisheries of the Lough Foyle Area). It was also given responsibility for another cross-border area around Carlingford Lough.

The Agency's main functions, as set out in the Act, are:

- Promotion and development of Lough Foyle and Carlingford Lough, for recreational purposes;
- Conservation, protection, management and development of inland fisheries;
- Development and licensing of aquaculture; and
- Development of marine tourism.

The legislation declared that part of the latter function would include:

The preparation of a strategic plan for marine tourism in the Foyle and Carlingford Areas and the promotion and marketing of those Areas (including by grant aid) and co-ordination and delivery of the development strategy.”

The Loughs Agency’s role will be to:

- Ensure an integrated approach to the development
- Lead where appropriate
- Co-ordinate activities
- Support and assist where appropriate
- Assist financially where appropriate and budget permitting
- Enhance, develop and advise
- All of the above will be in the context of the organisation structure shown below

In its simplest form of statement the Loughs Agency will have the following structure and role within said structure:

The Board of the FCILC, to which the Loughs Agency is appointed by the North South Ministerial Council, has twelve members including a Chair and Vice Chair who are also appointed by the NSMC.

The functions of the Agency are exercised by the Board who at all times will act in accordance with any directions (whether specific or general) given by the NSMC.

The FCILA is empowered to appoint a Chief Executive with the approval of the NSMC. The Chief Executive is responsible for the management and control generally of the administration and

With the directed approval of the NSMC the Board authorised the appointment of an advisory form to review.

The key role of the FCILC Board in this context is to develop and approve the:

- Policy
- Strategy
- Lobbying

The key role of the Loughs Agency Senior Management Team

- Operational decision making

The key role of the Advisory forum and sub groups

Full forum consisting of 48 no. members with sub groups [for Tourism] made up of 13no. Representatives from both catchments.

- Strategic inputs
- Advice and guidance

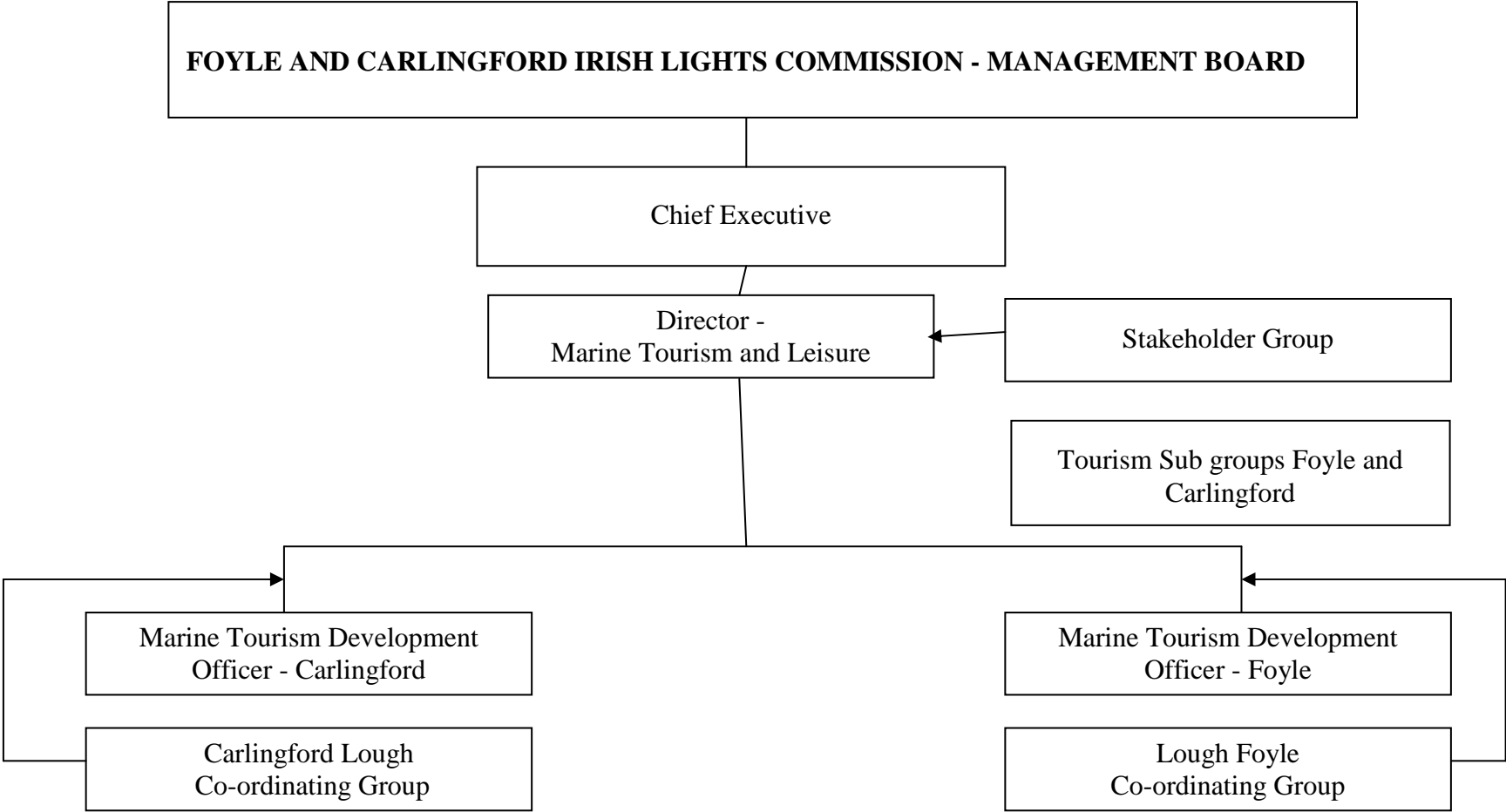
The key role of the sponsoring Departments and the NSMC

In line with Good governance input will be sought from the Agency's sponsoring departments, DARD and DCMNR via the current Operational Meetings context and thus ultimate accountability for the Agency will be to the North South Ministerial Council as is currently the case.

It should be noted that the above structure is largely the same as the current cross border bodies who currently manage Interreg funding and have been accepted as operationally satisfactory on both sides of the border.

The Loughs Agency in addition, and as laid out in the strategy will undertake consultations with Tourism Ireland and Tourist Boards regarding set up of organisational structure for the management and administration of all funds along with the respective Dept's of Finance..

Organisational Structure



10.2 Role and Function of the Management Board

The role of the Management Board will as follows:-

- To formulate policy relating to marine tourism and leisure on Lough Foyle and Carlingford Lough
- To actively oversee the implementation of the Marine Tourism and Leisure Strategy and Action Plan
- To work with relevant bodies to ensure co-ordination of North -South consistency in aspects of legislation, bye-laws, zones and jurisdiction, development approaches and support, navigation regulation and support.
- To co-ordinate and oversee policies aimed at incentivising the development of the private sector ie:
 - ➔ Administration of grant schemes
 - ➔ Tourism economic zones
- To secure the necessary financial budget for the development of major infrastructural development required to support marine tourism and leisure
- To secure budgets and co-ordinate marketing and promotional activities in liaison with tourist boards and Tourism Ireland

It is recommended that the Management Board should meet on a quarterly basis.

10.3 Stakeholder Group

The primary role of the Stakeholder Group will be to advise on the operational implementation of the Marine Tourism and Leisure Strategy for Carlingford Lough and Lough Foyle. It will also have a key role in ensuring that a partnership all-inclusive approach is brought to decision making thereby facilitating a sustainable approach to the development of marine tourism and leisure in the loughs area.

The stakeholder group, which will be drawn from the organisations listed below, will serve as a "sounding board" on new proposals and will also be encouraged to adopt a pro-active approach in bringing new tourism projects and initiatives forward to the Management Board.

The stakeholder group will comprise representation from the following organisations:

- Loughs Agency
- North West Region Cross- Border Group
- East -Border Region Cross-Border Group
- Northern Ireland Tourist Board
- Fáilte Ireland
- Local Authorities
- Port and Harbour Commissioners
- Coastguard Agencies
- North West Rural Development
- Private Tourism Businesses (X4)

Private sector representation is considered essential in order to give the stakeholder group the balance that is necessary. Where appropriate, sub-committees can be set up on an ad-hoc basis to address particular issues (ie. by-laws, new safety measures etc).

It is recommended that the stakeholder group be limited to a maximum of 12 organisations to facilitate decision making.

10.4 Area Co-ordinating groups

Two marine tourism and leisure co-ordinating groups, the Carlingford Lough Co-ordinating Group and the Lough Foyle Co-ordinating Group, will be established. The role of these groups will be to oversee the implementation of projects in their respective areas.

The co-ordinating groups will also work closely with the Development officers in bringing forward potential projects for consideration by the Management Board.

The co-ordinating groups will comprise representation from the following organisations:

- Loughs Agency
- Cross border groups (EBR/ NWR)
- Local Authorities
- Regional tourism organisations
- Port Authorities
- Private sector tourism businesses (x2)
- Foyle Area and Carlingford Advisory Forum (X1)

10.5 Staffing

Initially, it is proposed that three executives be employed on a full time basis. The positions proposed are as follows:

POSITION	RESPONSIBILITIES
Director - Marine Tourism and Leisure	<ul style="list-style-type: none"> ➔ Implement board policy/strategic plan ➔ Initiate and facilitate major infrastructural initiatives by public sector agencies ➔ Put in place programme of incentives and business supports designed to attract private sector investment liaison with Tourism Ireland and tourist boards ➔ Liaise with other advisory and support organisations ➔ Support area development officers in leisure products and clusters ➔ Develop and implement marketing campaigns (with tourist boards)
Marine Tourism Development Officer -	

The Director - Marine Tourism and Leisure and the Development Officer will be employed by the Loughs Agency.

The Development Officer will report to the Director - Marine Tourism and Leisure who in turn will report to the Chief Executive.

10.6 Next Steps

The next step in this project will involve the preparation of 5 year Development Plan for Marine Tourism Leisure no Lough Foyle and Carlingford Lough. The objective of Development Plan will be to identify and prioritize feasible projects.

This process will take the form of lobbying funding bodies for the release of the 12% of the estimated total capital costs. This will minimise the delays in the early stages of the funding period, and will avoid the ring fencing of public funding of projects not capable of being realised.

The early release of the (12%) in funding will be utilize for the preparation of feasibility studies/business plans/environmental impact statements and other investigations as required.

Loughs Agency Stakeholder Group

Mr	Chris John	d' Margary	Glenmore Rivers	25 Elderfield Place	London
Mr	Francis	Keys	The Bungalow	Carrickmore	Lifford
Mr	Richard	Fowler	1 Sailsbury Crescent	Londonderry	
Mr	Tim	Gibbons	11 Killowen Road	Rostrevor	Newry
Mr	Charles	Cavanagh	Santa Maria	Greencastle	Co Donegal
Mr	James	McKinley	Realt na Mara	Carrowhugh	Greencastle
Mr	Robert	Rodgers	55 Dromore Road	Omagh	Co. Tyrone
Mr	Ken	Doherty	20 Dunhugh Park	Victoria Road	Londonderry
Mr	Daniel	Gallagher	8-10 Haw Road	Lisahally	Co. Derry
Mr	Frank	O'Brien	Old Schoolhouse	Carlingford	Co Louth
			Warrenpoint Harbour		
Mr	Ciaran	Cunningham	Authority	The Docks	Warrenpoint
Mrs	Elish	O'Kane	57 Thornhill Park	Culmore Road	Derry
				109 Airport Road	
Mr	Malcolm	Emery	NI Seafood	West	Belfast
Mr	Brian	Connolly	3 Great George's Avenue	Warrenpoint	Co Down
Mr	Harold	Henning	15 Melrose Pk	Manse Road	Kilkeel
Mr	Alan	Money Penny	21 Newton Heights	Belfast	
Mr	Brian	Larkin	18 Euston Street	Greenore	Co Louth
Mr	Barry	Ramsay	Buxton	41 Glencar Park	Letterkenny
Mr	Harry	McCarthy	The Highlands Irish Grange	Carlingford	Co Louth
Mr	Derek	Smyth	41 Belvedere Park	Castlerock	
Mr	Peter	Lynch	9 Meadowvale Park	Tollymore Road	Newcastle
Professor	Chris	Paris	8 Stoneywood	Prehen	Derry
Mr	Tom	Woods	190 Aghafad Road	Clogher	Co Tyrone
Mr	Ivor	McMonagle	1 Foyleview Crescent	Moville	Co Donegal
Mr	Keith	Doherty	The Village	Greencastle	Co Donegal
Mr	Sam	Mcgregor	15 Meadowvale Park	Limavady	Co Londonderry
Mr	Jack	McInerney	Crieve House	Crieve	Letterkenny
Mr	Ronan	O'Doherty	13 Pillar Park	Buncrana	Co Donegal
Mr	Jim	Saunders	11 Kilfeaghan Road	Killowen	Rostrevor
Mr	William	Kelly	Malin Road	Moville	Co Donegal
					Co
Mr	Eamon	Mullan	184 Drumrane Road	Limavady	Londonderry
Mr	Pat	McLaughlin	38 Craigbrack Road	Eglinton	Londonderry
Mr	Don	Brassil	Grange House	Mill Grange	Carlingford
Mr	Peter	Archdale	6 Tattynure Road	Omagh	
Mr	John	White	The Waters Edge	River Row	Moville
Mr	Jim	Haughey	39 Broughton Gardens	Belfast	
Mr	Mark	Breenan	9 Kilfeaghan Road	Killowen	Rostrevor
Mr	Oliver	Finnegan	25 Chestnut Grove	Newry	Co Down
Mr	Robbie	Marshall	14 Gleneden Park	Jordanstown	Co Antrim
Mr	Brian	Cunningham	62 Greencastle Pier Road	Kilkeel	Newry
Mr	Tony	French	4 Hillcrest	Derry Road	Strabane
Mr	Paul	Strawbridge	1 Kinnego Park	Foyle Springs	L'Derry
Mr	Tom	Banford	17 Newcastle Road	Kilkeel	
Mr	John	Steele	Giladuff	Moville	Co Donegal
Mr	Declan	Little	Cedar Lodge	Glenealy	Co Wicklow
				Enterprise Fund	
Dr	Tony	McNally	NS SHARE Project Office	Business Centre	Ballyraine
Mr	Raymond	Dougal	Greencastle Road	Moville	Co Donegal

11. ACTION PLAN

- 11.1 Each of the action outlined in this Master Plan will need to be subjected to economic appraisal, environmental impact statements, and full statutory approval and consultation. Cognisance should be taken of previous developments in marine tourism, both successful and unsuccessful.
- 11.2 The tables presented in this section set out the main actions that will be required to achieve the aims for the development of marine tourism and leisure in the two areas. ***Implementation responsibilities and estimated costs are for discussion at this stage.*** The abbreviations used are as follows:

LA:	The Loughs Agency
MI:	Marine Institute
NWR:	The North West Border Region Group
EBR:	The East Border Region Committee
NSMC:	The North South Ministerial Council
LC:	Local Councils (represented on NWR and EBR)
DCC:	Derry City Council
CDC:	County Donegal Council
LDC:	Limavady District Council
NMDC:	Newry and Mourne District Council
LCC:	Louth County Council
TIL:	Tourism Ireland
NITB:	Northern Ireland Tourist Board
FI:	Faile Ireland
DVCB:	Derry Visitor and Convention Bureau
MVB:	Moville Boat Club
NWT:	North West Tourism Regional Tourism Organisation
ITSL:	Inishowen Tourism Society Limited
ECM:	East Coast & Midlands Regional Tourism Organisation
EHS:	Environment and Heritage Service
Priv:	Private Sector
CNW:	Cruise North West
CCAG:	Causeway Coast and Glens (Regional Tourism Organisation)
PORT:	Port Authorities
NWRD:	North West Rural Development

- 11.3 This action plan is set out under three headings as follows:

- Actions relating to set-up of organisational structure
- Lough Foyle Actions
- Carlingford Lough Actions

- 11.4 This Action Plan will cover the period 2007 – 2013 and will coincide with timing of the Fáilte Ireland Tourism Product Development Strategy. The priority (in terms of time) placed on each action is shown as follows:

1. Indicates short term actions (2007)
2. Indicates medium term actions (2008-2010)
3. Indicates longer term actions (2011-2013)

11.5 Organisation Set Up Actions

Aims (1) and (2):

To take full advantage of the Loughs Agency's position as a body that can assist the development and promotion of marine tourism and leisure on and around Lough Foyle, on both sides of the border.

To take forward an agreed version of this vision and strategy as the basis for a programme of action for the Loughs Agency, to be implemented in association with its partner bodies from the public and private sectors.

Actions	Lead Body	Support	Priority	Indicative Cost
Conduct wide consultation on the proposals of this Strategy and Action Plan	LA	NWR/ EBR	1	£ 10,000
Present Strategy and Action Plan to NSMC and Sponsoring Departments for approval (after taking account of consultation process)	LA	NWR/ EBR	1	*
Adopt the approved Action Plan as the action-oriented agenda for the LA Advisory Forum and Focus Group	LA	NWR/ EBR	1	*
Undertake consultations with Tourism Ireland and Tourist Boards regarding set up of organisational structure.	LA	NWR/ EBR	1	*
			Total	£10,000

*** Loughs Agency and Partners staff time only.**

Aim (3):

To develop and adopt an inter-agency integrated/inter country management structure for Lough Foyle and Carlingford Lough that will provide a medium (1) to ensure that this Marine Tourism Strategy is implemented in a sustainable and well-managed manner; (2) to establish a sustainable relationship between tourism and leisure, fishing and aquaculture; (3) to maintain the nature conservation interest and biodiversity of the Lough; (4) to assist with the management of user conflicts; and (5) to ensure adherence to bye laws, regulations and other legislation.

Actions	Lead Body	Support	Priority	Indicative Cost
Set up Stakeholder Group and Area Co-Ordinating Groups.	LA	NWR/ EBR/TIL/ NITB/FI	1	*
Set up procedures through which the Stakeholder Group would have a key role in overseeing proposals for the development and management of marine tourism.	LA	NWR/ EBR/TIL/ NITB/FI	1	*
Establish procedures to bring together the key statutory, industry, safety and recreational interests on a periodic basis to discuss and resolve issues of mutual concern (eg Strangford Lough Management Committee and Lough Neagh Coordinating Committee)	LA	NWR/ EBR/TIL/ NITB/FI	1	*
Seek powers to regulate and manage aspects of marine tourism and leisure within the operational area of the Loughs Agency, which would place operators and participants N&S on the same footing (eg. Launching, speed limits, essential equipment outside Harbour Authority areas)	LA	NWR/ EBR/TIL/ NITB/FI	1	*
Develop monitoring procedures that would be used to inform all interested parties of progress with the development of the Marine Tourism Strategy and its impact.	LA	NWR/ EBR/TIL/ NITB/FI	1	*

*** Loughs Agency and Partners staff time only.**

11.6 LOUGH FOYLE ACTIONS

Aim (4):

To achieve a substantial improvement in the availability, accessibility and quality of boat-based activities in Lough Foyle (including new infrastructure; permanent arrangements for dredging and maintenance; and actions to minimise hazards)

Actions	Lead Body	Support	Priority	Indicative Cost
Support current proposals to develop the 1 st phase of a marina at Carrickarory.	MVB/ et al	LA/ CDC	1	£2,100,000
Encourage development of more berthing space and facilities as part of the redevelopment of Derry waterfront	ILIX/ DCC	LA/ Priv	2	Note 2
Support extension of boat berthing at Bunagee Harbour (Culdaff), improved facilities at Culmore and visitor moorings at other locations on the Inishowen coast	CDC/ Priv	LA	1	£200,000
Establish permanent arrangements for the dredging and regular maintenance of facilities that are key to leisure boating (eg. harbour entrances and basins, small piers)	LDC	LA	1	
Implement range of measures to minimise hazards and improve information for boat-based activity (eg. comprehensive survey of the bed and shores of the Lough; update of admiralty charts; physical marking of key sandbanks and rocks; provision of a pilot book for small craft; introduction of zoning based on good practice elsewhere; regular monitoring of training standards)	LA	PORT	1-2	
Provide business development assistance to increase the number of boats providing trips associated with marine tourism activities (including river cruising/dining, excursions, adventure boating, sea angling, diving and wildlife watching).	LA	LCs	1	£25,000
Provide incentives to the private sector to invest in the marine tourism product (ie. grants, tax breaks/business expansion scheme etc - 10 Projects).	LA	NSMC	1	£500,000
Encourage relationships between pleasure boat trip providers, tour operators and accommodation providers	LA	DVCB/ Priv.	1	*
Ensure implementation of a licensing system for wildlife boat trip providers	LA	LA	1	*
Improve harbour access for the Lough Foyle ferry to facilitate ferry passengers and fishermen	DCC	Private	2	£500,000
Consider the provision of floating dry dock facilities on the Foyle to assist in the maintenance of the Foyle ferry.	DCC/CDC	Private	2	£1,000,000
			Total	£4,325,000

*** Executive Staff time only**

Note 1: based on costs given by MBC for floating breakwater and 64 berth pontoons (£600-800k). They already have £600 from Interreg.

Note 2: It is not possible to cost this until more details are known about the waterfront redevelopment (eg. Queen's Quay)

Aim (5):

To enhance the quality and availability of beach-based activities in the most appropriate locations in the Lough Foyle Area.

Actions	Lead Body	Support	Priority	Indicative Cost
Identify and agree the areas where beach-based activities will be concentrated (ie. on land and water) eg. Benone as the main one but with other beaches playing complementary roles. (Feasibility study)	LCs / LA	EHS	1	£25,000
Establish spatial and temporal zoning system and access management for activities in these areas (based on agreed hierarchy). (Sustainable Management Plan.)	LCs	EHS	1	£25,000
Work closely with conservation bodies to avoid adverse environmental impacts	LCs	EHS	1	*
Provide infrastructure to support additional beach-based activities in these areas (eg. 5 locations- toilets and changing, parking, shelter, new access routes)	LCs	LA	2	Toilets and changing £250,000 Parking £500,000
Encourage the provision of more facilities for visitors to certain special natural areas(eg. 5 locations- parking, hides, paths, interpretation, behaviour codes)	LCs	LA	2	£250,000
Provide business development assistance to increase the number of operators providing hire services, tuition, guided walks and short breaks.	LA	NWR	1-2	£25,000
Ensure full management and monitoring procedures	LCs	LA	2	*
Publicise the suitability of water quality in these areas	LCs	LA	1	£20,000
Establish programme of events involving beach-based activities	LA	LCs	1	£30,000
Encourage relationships that will develop activity breaks (eg between tuition/hire operators and accommodation providers)	LA	DVCB/ NWT	1	*
				£1125000

*** Executive Staff time only.**

Aim (6):

To develop and promote the area's attractiveness for "achievement seekers."

Actions	Lead Body	Support	Priority	Indicative Cost
Review, refine and endorse the local group's tourism development plan for the Malin Head area .	BOARD	CDC	1	£10,000
Help to implement the plan to capitalise on Malin Head's superlative status (most northerly, sunniest) eg the proposed tourist/community centre, improvements to the Tower, path development, guided walks, Signage, Lay Bys etc.)	CDC	NWT	1-2	£300,000
Promote the significance of Malin Head (a unique tourism asset of the area)	LA	TIL/FI/ NWT	1	£25,000
Develop adventure packages based on appropriate water/land-based activities (eg. RIB trips, dolphin spotting, rock climbing, long distance walking, wreck viewing)	LA	NWT/ Priv.	1	*
Promote the development of long-distance walking/cycling within the area (eg. along the east coast levels) and in connection with outside areas.	LA	LCs	2	MARKETING COST
Promote the area specifically as one for challenge, self-fulfilment and achievement.	LA	DVCB/ CCAG/ NWT	1	MARKETING COST
Develop a range of "awards" merchandise (eg. certificates, T shirts, trophies) relating to adventures/achievements.	LA		2	£15,000
Provide training for operators in marine safety	FI	FI	1	£25,000
				375000

*** Executive Staff time only.**

Aim (7):

To contribute to the development of the area's city-based tourism product.

Actions	Lead Body	Support	Priority	Indicative Cost
Promote the marine tourism product as part of the city-break offer (once above actions have improved the availability of boat trips etc)	DVCB	LA/ TIL	2	*
Develop business relationships and packages involving co-operation between the city's accommodation providers and marine tourism activity operators	LA	DVCB/ NWT	1	*
Continue to attract visiting cruise ships and	CNW/	LA /	1	Within CNW

Actions	Lead Body	Support	Priority	Indicative Cost
offer more Lough Foyle experiences to these visitors (eg. coastal trips, visits to Malin Head)	DVCB/ NWT	TIL		budget
Identify and develop marine tourism events that will attract overnight spectators into the area (eg. historic ship visits, traditional craft events, international competitions - Events Strategy)	CNW/ DVCB/ NWT	LA / TIL	2	£20,000
				20000

*** Executive Staff time only.**

Foyle Aim (8):

To improve and consolidate the area's position as a destination for activity tourism breaks, by encouraging the development of a fully integrated set of services for activities in key localities (ie. developing co-operation amongst service providers in "clusters").

Actions	Lead Body	Support	Priority	Indicative Cost
Encourage the development of more accommodation for tourists (especially self-catering, guest houses and B&Bs- eg: 10 establishments.)	Priv.	LA / NITB/FI	2-3	£250,000
Encourage the development of other key support facilities (eg. seafood restaurants)	Priv.	LA / NITB/FI	2	£50,000
Support the development of activity opportunities (as in Aims 4 and 5), including those that are neither boat nor beach based (ie. coastal walking, rock climbing, activities in country parks)	Priv. /LC	LA / NITB/FI	2	£100,000
Develop co-operation between existing and new accommodation providers and businesses involved in marine tourism activities (ie. clusters of facilities and services that can be packaged together and offered to tourists in advance of or during their visit).	LA	NWT/ DVCB/ Priv.	1-2	*
Support the development of birdwatching hides on east side of Lough Foyle.	Limavady BC	LA/EHS	1	£300,000
				700000

*** Executive Staff time only.**

Foyle Aim (9):

To establish a reputation for the area as a venue for exciting and unique events.

Actions	Lead Body	Support	Priority	Indicative Cost
Support the proposed Celtic Maritime Festival for 2006 (Marketing)	LA	LA/ NWRD DCC/ NWT	1	£50,000
Seek to establish an annual event of its type, based in the Foyle	LA	LA/ DCC/ NWT	1	*
Identify and pursue other marine tourism-based events that could be staged regularly in the area (Round Inishtrahull Race; an annual boating event to Strabane; and "cruise in company" events/trips between Carlingford Lough and Lough Foyle, and from Bangor/Carrickfergus to both Loughs)	LA	LA/ DCC/ NWT	1	* £10,000 pa
Support the Inishowen Maritime Museum as the principal 'hub' of the Celtic Maritime Festival.	LA	LA/ DCC/ NWT	1	*
				60000

*** Executive Staff time only.**

Aim (10):

To help to establish the Lough Foyle Area as a focal point for organised and independent tours.

Actions	Lead Body	Support	Priority	Indicative Cost
Work with tour operators to enhance the area's popularity as a place to stay at least one night, including offers of boat trips and other specialist visits (eg. up to Malin Head, viewing the beauties of Benone, sampling seafood)	DVCB/ NWT	LA	1	*
Develop scenic driving opportunities that encourage a circular tour of the area (eg. enhance the Inishowen 100 signing system, more viewpoints/stopping places on both side, on-site interpretation and stronger promotion of the Ferry)	LA	LC/ NITB/FI	2-3	Coach Parks(x5) £250,000 Lay Bys(x10) £500,000 Signage £50,000
Support recommendations for the establishment of the North Atlantic Trail as recommended in the Causeway Coast and Glens Master Plan.	LA	LC/ NITB/FI	1	*
Establish railway halt at Benone Beach. Run special excursion trains with commentaries along the coastline.	Limavady BC	Translink	3	£ 2 million
				2800000

Aim (11):

To develop beneficial links between the core maritime area, other parts of the Foyle catchment and further afield, by encouraging linkages, interaction and the spread of tourism activity.

Actions	Lead Body	Support	Priority	Indicative Cost
Establish closer links between accommodation and activities available in the Foyle Area and those that can be pursued further afield (eg. links with Lough Swilly and Trawbreaga Bay activities and the proposed Donegal Marine Leisure Zone; gold panning in the Sperrins; other walking routes; and visits to special places like the Giant's Causeway, Dunluce Castle, etc)	LA	NWT/ DVCB	1	Product Familiarisation Programme. £30,000
				£3,0000

11.7 CARLINGFORD LOUGH ACTIONS**Aim (4):**

To achieve a substantial improvement in the availability, accessibility and quality of boat-based activities in Carlingford Lough (including new infrastructure; permanent arrangements for dredging and maintenance; and actions to minimise hazards).

Actions	Lead Body	Support	Funding	Indicative Cost
Identify the feasibility of providing a full access/disembarkation point for a Carlingford Lough boat trip at Carlingford Village	LCC	LA / EBR	1	£30,000
Investigate the feasibility of improved public access to the water via the harbour at Rostrevor to complement visitor interest in the country park and forest park (eg. tide dependent landing opportunities for boat trips, access points for moorings)*	NMDC	EBR	1	£30,000
Encourage the development of a marina at Warrenpoint to provide improved shelter and berthing for leisure craft, sea angling boats and visitors (thereby increasing marine interest in the town centre)*	Priv.	LA / EBR/ NMDC	2	
Renew the pontoon at the Warrenpoint breakwater to provide a full access/disembarkation point for a Carlingford Lough boat trip*	NMDC	EBR	2	
Encourage introduction of a Carlingford Ferry from Greenore to an appropriate location on the eastern shore (preferably without damaging the cultural heritage, ambiance and scenic quality of Greencastle)	Priv.	LA / EBR	1	*
Encourage the provision of scenic/dining boat trips on the Newry Ship Canal between the Victoria Lock and the Quays Commercial Centre	NMDC/ NITB/ Priv.	LA	2	£20,000 grant for provider

Actions	Lead Body	Support	Funding	Indicative Cost
Establish permanent arrangements for the dredging and regular maintenance of facilities that are key to leisure boating (eg. harbour entrances and basins, small piers)	LC		2-3	
Implement range of measures to minimise hazards and improve information for boat-based activity (eg. comprehensive survey of the bed and shores of the lough; update of admiralty charts; physical marking of key sandbanks and rocks; provision of a pilot book for small craft; introduction of zoning based on good practice elsewhere; regular monitoring of training standards)	LC	PORT	2-3	
Provide business development assistance to increase the number of boats providing trips associated with marine tourism activities (including pleasure cruising, excursions, adventure boating, sea angling, diving and wildlife watching).	LA	MI	1-2	£25,000
Provide incentives to the private sector to invest in the marine tourism product (ie. grants, tax breaks/business expansion scheme etc - 10 projects).	LA	NMSC	1	£500,000
Encourage relationships between pleasure boat trip providers, tour operators and accommodation providers	LA	ECM/ NMDC/ Priv.	1	*
Ensure implementation of a licensing system for wildlife boat trip providers	LA	LA	1	*
				£605,000

***Initiatives already underway**

*** Executive Staff time only.**

Aim (5):

To enhance the quality and availability of water and beach-based activities in the most appropriate locations in the Carlingford Lough Area.

Actions	Lead Body	Support	Priority	Estimated Cost
Identify and agree the areas where beach-based activities will be concentrated (ie. on land and water, with Cranfield as the main location within the whole area Feasibility Study)	LCs/ LA	LA/ EHS	1	£25,000
Enhance the opportunities for sheltered water sports participation within Carlingford Harbour (including shared use of the harbour by leisure craft and fishing boats)	LCC	LA/ EBR/ PORT	2	
Establish spatial and temporal zoning system and access management for activities in these areas-(Sustainable Management Plan)	LCs	EBR/ LA	2	£25,000
Work closely with conservation bodies to	LCs	EHS/	1-2	*

Actions	Lead Body	Support	Priority	Estimated Cost
avoid adverse environmental impacts. Upgraded sewage treatment works for the area a priority.		MI		
Provide infrastructure to support additional beach-based activities at Cranfield (eg. toilets and changing, parking, shelter) Manage beach to protect use by non motorised sports.	LCs	LA	2	Toilets and changing £500,000 Parking £250,000
Provide business development assistance to increase the number of operators providing hire services, tuition, guided walks and short breaks.	LA	EBR	1-2	£25,000
Ensure full management and monitoring procedures	LCs	LA	2	*
Publicise the suitability of water quality in these areas	LCs	LA	1	£20,000
Establish programme of events involving beach-based activities	LA	LCs/ EMC	1	*
Encourage relationships that will develop activity breaks (eg between tuition/hire operators and accommodation providers)	LA	NMDC/ ECM	1	*
				£845,000

***Initiatives already underway**

*** Executive Staff time only.**

Aim (6):

To improve and consolidate the area's position as a destination for activity tourism breaks by encouraging the development of a fully integrated set of services for activities in key localities (ie. developing co-operation amongst service providers in "clusters").

Actions	Lead Body	Support	Priority	Estimated cost
Encourage the development of more marine related accommodation for tourists (especially hotels, self-catering, guest houses and B&Bs- ie. 10 establishments)	Priv.	LA / NSMC	2-3	£250,000
Encourage the development of other key marine tourism support facilities (eg. seafood restaurants)			2-3	£50,000
Support the development of activity opportunities (as in Aims 4 and 5), including those that are neither boat nor beach based (ie. coastal walking/cycling/driving, activities in park areas)	Priv./ LC	LA/ NITB/ FI	1	£100,000
Develop co-operation between existing and new accommodation providers and businesses involved in marine tourism activities (ie. clusters of facilities and services that can be packaged together and offered to tourists in advance of or during their visit).	LA	ECM/ NMDC/ Priv.	1	*
Provide training for operators in marine	FI	EBR	1-2	£25,000

safety (eg Failte Ireland Marine and Countryside Programme)				
Develop cycle/walking route on North side of Lough between Newry and Warrenpoint.	NMDC	EHS	1	£80,000
Develop birdwatching hides at Mill Bay near Cranfield	NMDC	EHS	2	£150,000
				£655,000

*** Executive Staff time only.**

Aim (7):

To establish a reputation for the area as a venue for exciting and unique events.

Actions	Lead Body	Support	Priority	Indicative Cost
Support the proposed Carlingford Maritime Festival (Marketing)	LA	LA/ NMDC/ ECM	1	£50,000
Seek to establish an annual event of its type, based in the Carlingford Area (especially yacht racing with Carlingford Lough as a starting or ending point)	LA	LA/ NMDC/ ECM	1	£20,000
Identify and pursue other marine tourism-based events that could be staged regularly in the area	LA	LA/ NMDC/ ECM	1	*
				£70,000

*** Executive Staff time only.**

Aim (8):

To help to establish the Carlingford Lough Area as a focal point for organised and independent tours.

Actions	Lead Body	Support	Priority	Indicative Cost
Work with tour operators to enhance the area's popularity as a place to stay at least one night, including offers of boat trips and other specialist visits (eg. the medieval village of Carlingford, shopping in Newry, the Mountains of Mourne, South Armagh)	NMDC/ ECM	LA	1	*
Develop scenic driving opportunities that encourage a circular tour of the area (eg more viewpoints/stopping places on both side, on-site interpretation and strong promotion of the new Ferry)	LA	LC/ NITB/ FI	2-3	Coach Parks(x5) £250,000 Lay Bys(x10) £500,000 Signage £50,000
Ensure that any future proposal for a bridge at Narrowwater incorporates a swing bridge or a lifting bridge to facilitate boat access to Newry Canal.	NMDC/ LCC		1	*

Promote the area to potential hotel investors to address the shortfall in this type of accommodation.- (Prospectus)	NMDC/ ECM	LA / EBR	2-3	£35,000
				£385,000

*** Executive Staff time only.**

Aim (9):

To develop beneficial links between the core maritime area, other parts of the Carlingford catchment and further afield, by encouraging linkages, interaction and the spread of tourism activity.

Actions	Lead Body	Support	Priority	Indicative Cost
Establish closer links between accommodation and activities available in the Carlingford Lough Area and those that can be pursued further afield (eg. links with the rest of Cooley, Louth, the Mourne, South Armagh)	LA	ECM/ NMDC/ LC/ EBR	1	
Provide electronic gates at Victoria Locks.	NMDC	DCAL	1	£ 150,000
Develop promenade along the town end of the town deck at Warrenpoint.	NMDC	Warrenpoint Harbour Authority	1	£100,000
Channel markers for recreational boats to access Newry Ship Canal	NMDC			
				£250,000

***Initiatives already underway**

APPENDIX 1 - ILLUSTRATION OF AUDIT

APPENDIX 2

WORKSHOP - ATTENDEE LISTINGS

**LOUGHS AGENCY
MARINE TOURISM WORKSHOP
21st September 2004
FOYLE AREA**

NAME	ORGANISATION
Peter Harper	Causeway Coast & Glens Heritage Trust
Richard Gillen	Limavady Borough Council
Anne Wilkinson	Marine Institute
Aideen Corr	Cruise North West
Kevin O' Connor	Donegal Maritime Leisure
Gemma Havlin	Inishowen Maritime Museum
Charles Cavanagh	Irish Coast Guard
Jack Mc Inerney	Foyle Ferry Co. Ltd
Jim Mc Clenaghan	Foyle Ferry Co. Ltd
Bill Mc Cann	Londonderry Port
Brian Mc Grath	Londonderry Port
Seamus Bovaird	L.A. Advisory Panel
Marian Mc Donald	Donegal Co Council
Paul Mc Laughlin	Lough Foyle Oyster Sub Committee
John White	B.O.M Chairman Moville College
Eamon Mullan	Advisory Forum
Patti holly	North West Institute
Rita Brady	North West Institute
Fergal Kearney	N.I.T.B.
Catherine O'Connor	Derry Visitor & Convention Bureau
Kevin O' Connor	Donegal County Council
Bernard McGuinness	Donegal County Council
Terry Mc Keown	Dept. Agriculture & Rural Development
Eamon Molloy	NWRCBG
Herbie Lusby	Port Hall Co Donegal
Tony French	Foyle Draft Net Association
Patrick Barrett	Foyle Draft Net Association

Don Mc Glinchey	City of Derry Sub- Aqua Club
Garry Smith	City of Derry Sub- Aqua Club

**LOUGHS AGENCY
MARINE TOURISM WORKSHOP
22nd September 2004
CARLINGFORD AREA**

NAME	ORGANISATION
Aubrey Irwin	Tourism Ireland
Oliver Finnegan	Carlingford Lough Sea Angling
Martin Cunningham	N. M. D. C.
Michelle Boyle	N. M. D. C
Seamus Crosse	N. M. D. C
David Bartes	N. M. D. C.
Séamus Kelly	D. A.RD.
Liam Higgins	Fjordlands
Jim Lindsay	Fjiordlands
Owen V Woods	Fjordlands Carlingford
Michael Carr (cllr)	Newry & Mourne
Peter Conway	Loughs Agency Advisory Forum
Colette Murney	Carlingford Lough Boating Association
Roisin Garland	Department of Communications, Marine and National Resources
Alison Condra	Louth Co. Council
Dette Hughes	East Border Region
Cliffs Rankin	Cranfield Caravan/ Boat Owners
Kate Hutchinson	Ulster Wildlife Trust & WWF NI.
Terry Brennan	Chairman Louth Co.