

QUESTIONS TO BE ADDRESSED

1. What is marine tourism potential?
2. How can we maximise the resource for local coastal communities whilst minimising the environmental impact?
3. What have been the limiting factors to date?
4. How can demands for space be reconciled?

WHERE CAN ANSWERS BE FOUND:

1. Look at experience on ground
 - Lack of national policy in marine tourism - business displacement a threat (e.g. need to apply State Aid Rules / need to avoid 'grant-driven' mentality)
 - Investors frustrated by long timelines (e.g. public services / foreshore / planning)
 - But, some planning and strategic thinking going on in sector
2. Need to look objectively at opportunities and set **POLICY**

**ACHIEVING CONSENSUS
IN DONEGAL?
EXAMPLES
OF
DIFFICULTIES & APPROACHES**

1. Experience on the Ground?

**DONEGAL
MARINE & WATER-BASED
LEISURE AND TOURISM
INITIATIVE**

Údarás na Gaeltachta

**Negotiations on Management of
State-owned Salmon Fisheries**

1. Leannan
2. Lackagh
3. Clady/Croilly
4. Gweebarra
5. Owenea *
6. Glen
7. Eany *
8. Eske *

* Already under direct NRFB management

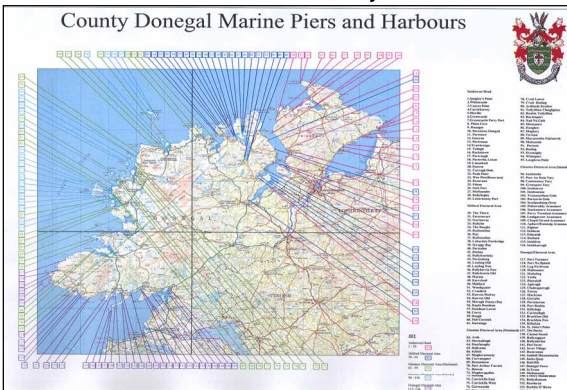
- Agencies
- Clubs
- Politics
- Tourism
- Investment
- Marketing

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DFP Construction Service Pier and Harbour Study

County Donegal Marine Piers and Harbours

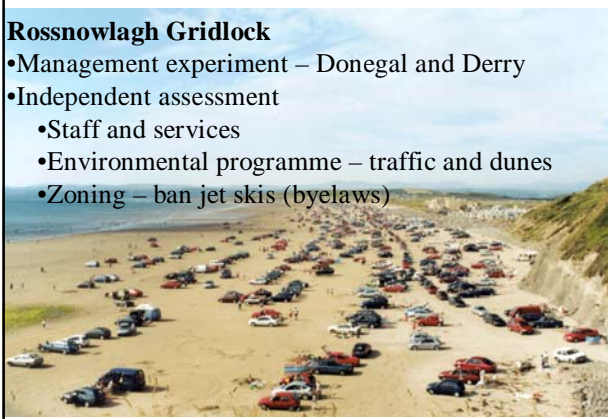


River Liffey Regeneration Strategy



Rossnowlagh Gridlock

- Management experiment – Donegal and Derry
- Independent assessment
 - Staff and services
 - Environmental programme – traffic and dunes
 - Zoning – ban jet skis (byelaws)

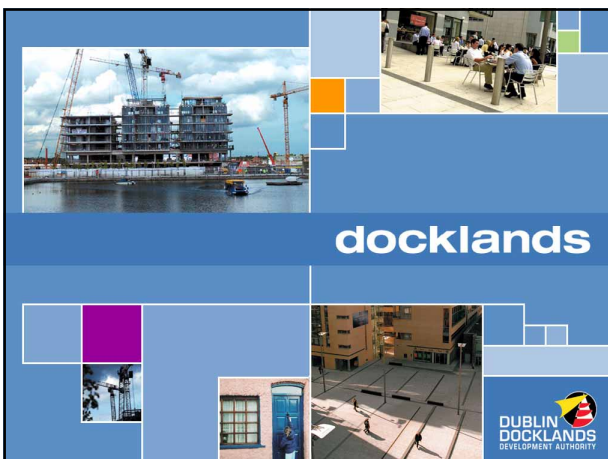


River Liffey Regeneration Strategy

Objective

Master Plan 4.7.5 "The importance of the riversides cannot be overstated. Through their progressive development as public realm the whole character of the area is changing."

Policy 6.3.9.8 "The Authority will maximise the amenity potential of the water bodies".



Reusing the River

- Cruise Liners
- Itinerary of visiting "special attraction" vessels
- Moorings for yachts/cruisers
- Public leisure uses in attractive static vessels
- Modern, fast, high quality coastal commuter ferry service
- Tourist trip boat ventures
- River taxi service
- Slipway/landing stages to encourage small craft

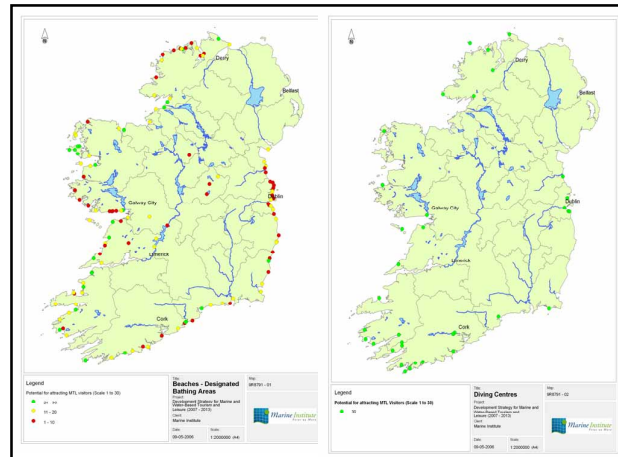


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Events and Profile

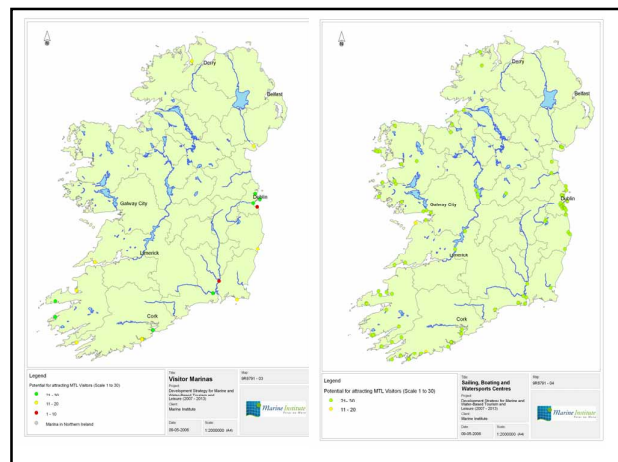
- Direct the Docklands Festival to the river
- Manage moorings to permit major displacement events eg 1720's racing and Irish Coastal Rowing Championships etc
- Host Skyfest and similar
- Encourage the various Dublin tour buses etc to bring visitors in



Riverside – Public Realm

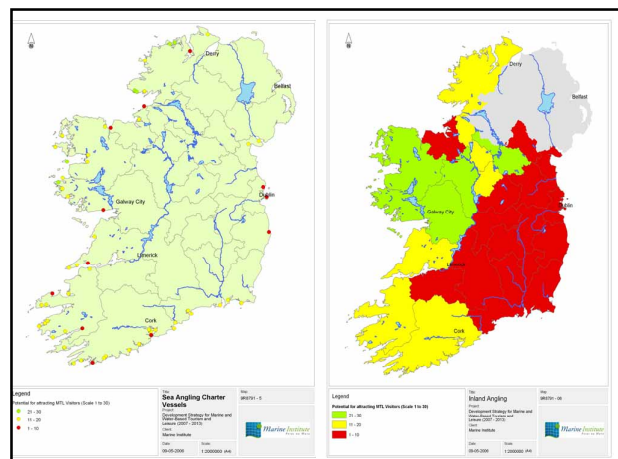
Public Realm
Environmental
Development

Creation of new public
areas and routes



2. WHAT IS OPPORTUNITY MAPPING ?

- Dutch Spatial Planning Approach
 - What are key marine tourism activities?
 - Where are they located?
 - Map / Score them.... Quantitative + Qualitative Audit
 - Map / Score External Factors
 - Tourism Services & Access (affect visitor decisions)
 - Factor in weights
- Output Maps= Opportunities / Gaps



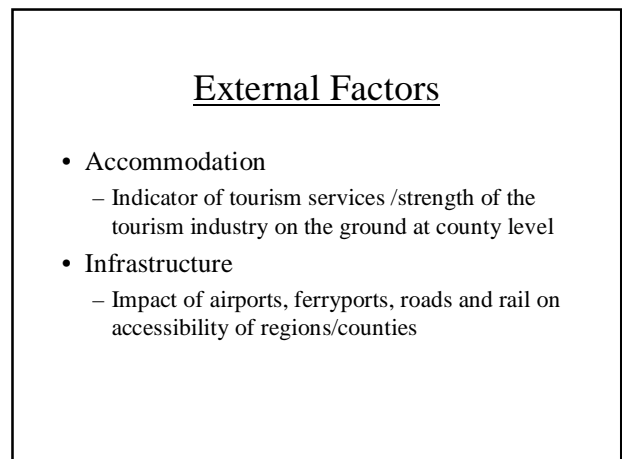
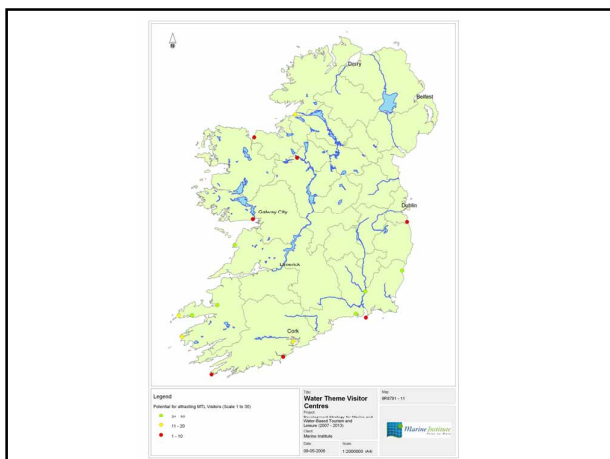
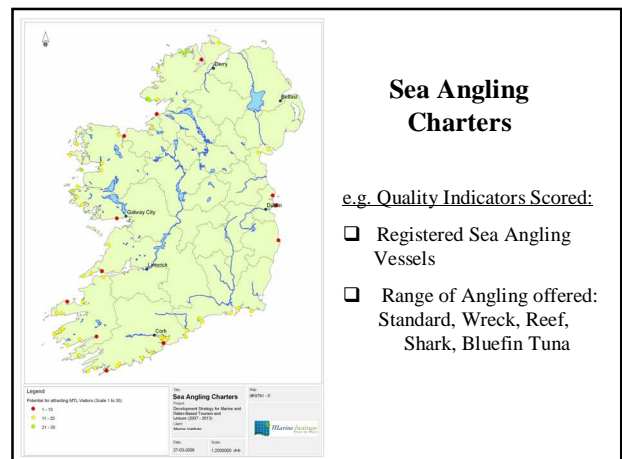
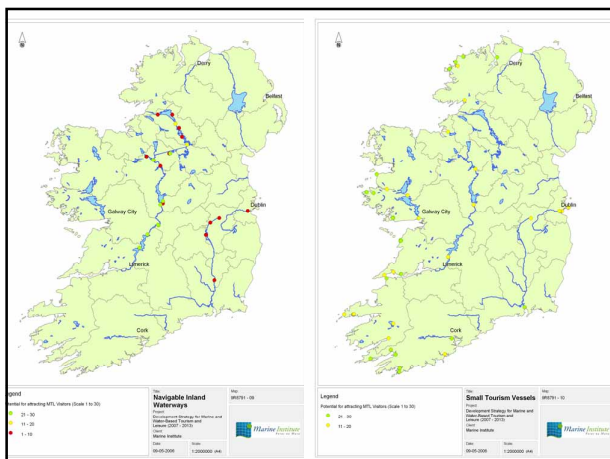
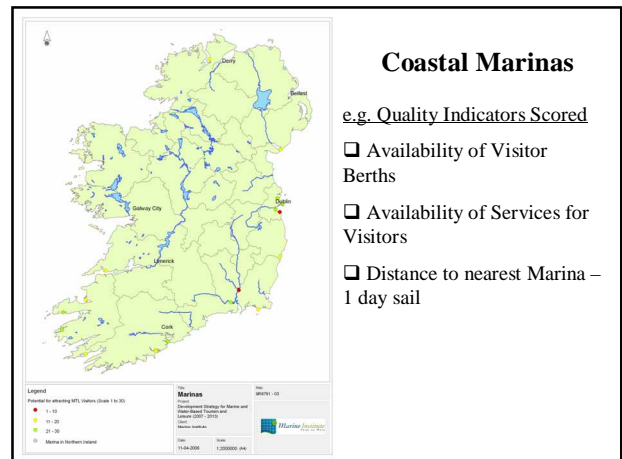
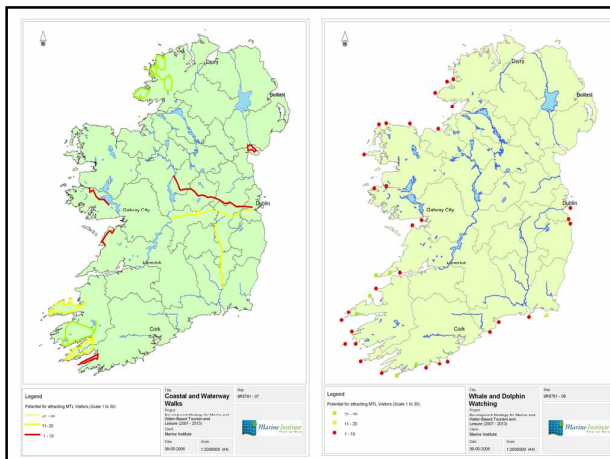
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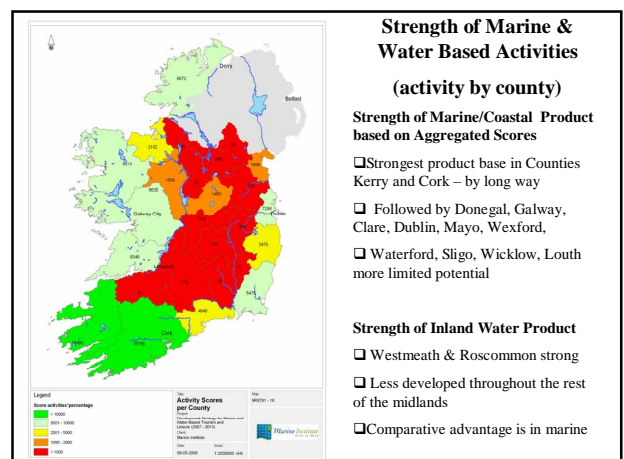
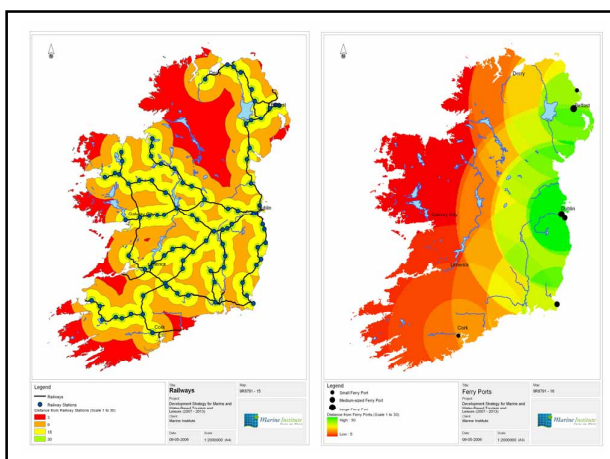
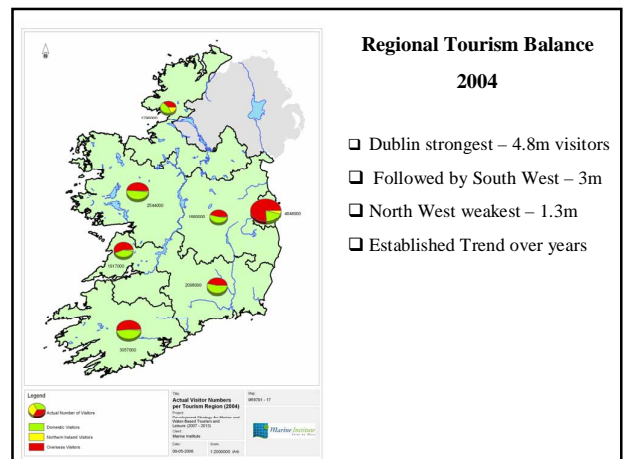
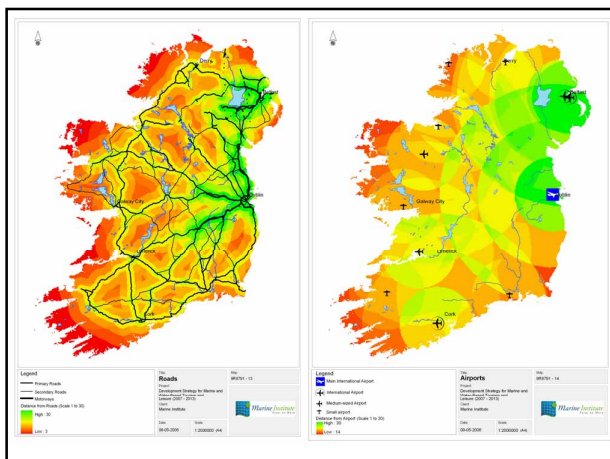
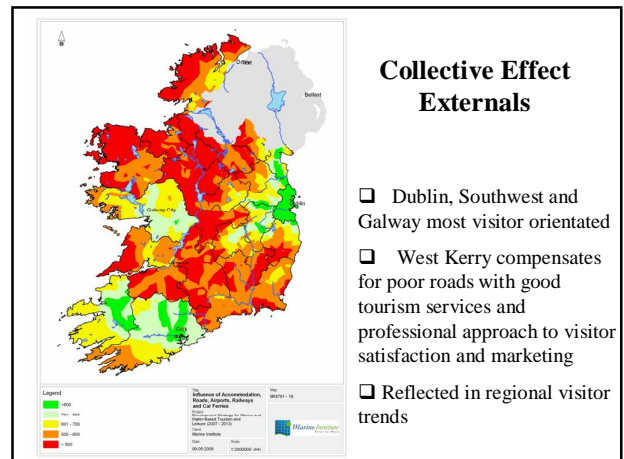
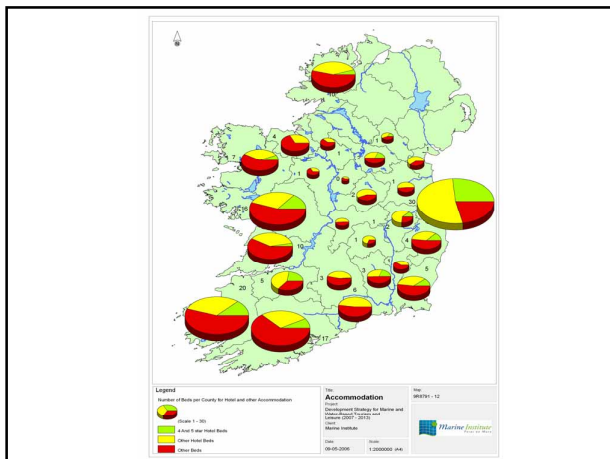
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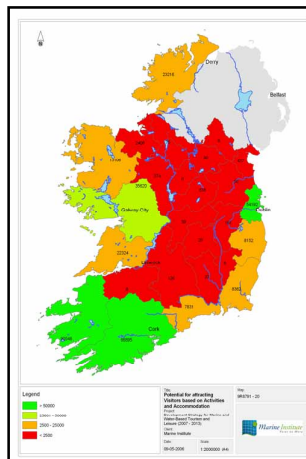
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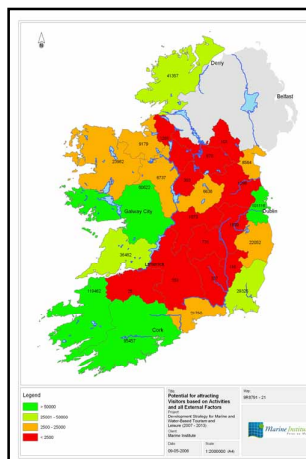
Packaging Marine & Water Activities with Mainstream Tourism Services at County Level

- Using accommodation as an indicator of the strength of tourism industry at county level
- Combined with the strength of the marine tourism product base (activity scores)
- Indication of relative potential to package and promote MTL activities
- Most of western seaboard counties have the resources and accommodation stock to develop a strong product base which is attractive to domestic tourists
- Kerry, Cork & Dublin – Immediate potential for enhanced packaging & promotion - Galway also attractive
- Donegal, Clare, Mayo Wexford, Waterford, Wicklow and Sligo – immediate potential for product investment but have product gaps in activities / services

Next Step: Development Blue Print

Table 4: Identification of Marketable Products and Product / Service Gaps by Coastal County.

Order of Existing Product Strength	Coastal Counties	Beaches	Diving	Visitor Marinas	Sailing, Boating, Water Sports	Sea Angling	Inland Angling	Coastal Walking	Whale & Dolphin Watching	Inland Waterways	Small Tourism Vessels	Marine / Water Theme Visitor Centres
1	KERRY	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
2	CORK	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
3	DONEGAL	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
4	GALWAY	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
5	CLARE	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
6	DUBLIN	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
7	MAYO	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
8	WEXFORD	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
9	WATERFORD	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
10	WICKLOW	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
11	SLIGO	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
12	LOUTH	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
13	LEITRIM	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
14	MEATH	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
15	LIMERICK	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap	Product Gap
KEY		Product not developed / insufficient quality / relatively low tourism demand / relatively small element of county tourism product	Excellent or very good product that can be brought to market immediately. Requires promotion / packaging / service links	Good product that can be developed in short term. Requires improvement in quality and organization to complete	Potential to grow subject to investment in product development / infrastructure / links to tourism industry / accommodation							

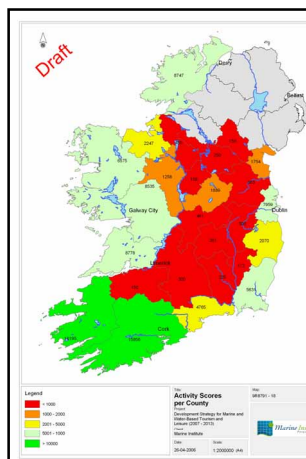


Attractiveness of Marine & Water Activities to Overseas Visitors

- Impact of access infrastructure
- Strength of tourism industry in each county
- Combined with strength of marine and water tourism product base
- To provide an indicator of relative potential to package and promote activities to the overseas market.
- Most of western seaboard counties have the potential to attract overseas tourists
- Kerry, Dublin, Cork and Galway in order have the greatest potential.
- Followed by Donegal, Clare, Wexford
- Mayo and Waterford also have quite strong potential.

Next Step: Strategic Investment

Product / Service	Key Department / Agency	Investment Source € million			Total Investment € million	Total Public Investment € million
		Public	Private Invest.	State Aids		
Beaches	Environment & Local Govt. / Gaeltache & Rural Affairs / Local Authorities	30.0m			30.0m	
Visitor Marinas / Safe Havens		2.4m	18.0m	2.0m	22.4m	41.2m
Coastal Walking Routes		6.8m			6.8m	
Diving			9.0m	4.3m	13.3m	
Marine Visitor Centres	Sports & Tourism / Fáilte Ireland	10.0m			10.0m	29.7m
Sailing/Boating/Watersports			6.0m	2.9m	8.9m	
Small Tourism Vessels			7.5m	4.1m	11.6m	
Product Clustering & Signature Products			19.6m	8.4m	28.0m	
Inland/Sea Angling	DCMNR / Fisheries Boards	3.5m	2m		5.5m	35m
Totals		€ 84.2m	€ 62.1m	€ 21.7m	€ 168m	€ 105.9m



Analysis of Product Gaps

- Beach resort facilities and coastal walking routes right around coastline
- Absence of visitor marinas between South Clare and North Donegal
- Sea angling access via small piers and harbours on Southeast/Northwest coasts
- Sea trips/small tourism vessels on East and Southeast Coast and Clew Bay to Donegal Bay
- Water themed visitor centres Mayo, Donegal and Louth – need new ideas
- Activity gaps identified in all of weaker coastal counties
- Island visits linked to Irish culture/language
- Harbour visits linked to local cuisine/seafood
- Inland waterways – themed routes
- Inland angling – reorganisation underway around stocks and tourism access
- Build on Ireland's distinctive location as Europe's most westerly island – "wet and wild" and "passive" activities

Next Step: Strategic Marketing

Table 4.2: Identification of Target Markets and Promotional Platforms (based on maps 18 and 20 to 25 - activity by county)

Order of Map	Map 18: Overall Product Strength (All Activities)	Map 20: Potential to Attract Domestic Visitors (All Activities)	Map 21: Potential to Attract Overseas Visitors (All Activities)	Map 22: Marketing Platform "Spirit of Adventure" (Adventure Potential)	Map 23: Marketing Platform "Trails and Ways" (Recreation Potential)	Map 24: Marketing Platform "Family Adventure" (Recreation Potential)	Map 25: Marketing Platform "Balanced Living" (Recreation Potential)
1	KERRY	KERRY	KERRY	CORK	CORK	CORK	KERRY
2	CORK	CORK	DUBLIN	KERRY	KERRY	KERRY	CORK
3	DONEGAL	DUBLIN	CORK	MAYO	CLARE	DONEGAL	GALWAY
4	GALWAY	GALWAY	DONEGAL	DONEGAL	GALWAY	GALWAY	CLARE
5	CLARE	DONEGAL	DONEGAL	DUBLIN	DONEGAL	DUBLIN	DONEGAL
6	DUBLIN	CLARE	CLARE				
7	MAYO	MAYO	WEXFORD				
8	WEXFORD	WEXFORD	MAYO				
9	WATERFORD	WICKLOW	WICKLOW				
10	WICKLOW	WATERFORD	WATERFORD				
11	SLIGO	SLIGO	SLIGO				
12	LOUTH	LOUTH	LOUTH				
13	LEITRIM	LEITRIM	MEATH				
14	MEATH	MEATH	LEITRIM				
15	LIMERICK	LIMERICK	LIMERICK				
KEY: (Visitor's Perspective)							
				Excellent or very good product that can be brought to market immediately. Requires promotion / packaging / service links / some product development.			
				Basis for excellent product that can be brought to market in short term (requires organisation / promotion / packaging / service links / some product development).			
				Good product that can be developed in short term (requires improvement in quality and organisation to complete / some product development).			
				Access to product reasonable / accommodation suitable / some weaknesses in underlying product need to be addressed.			
				Potential to grow subject to investment in product development / infrastructure / links to tourism industry / accommodation.			

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Final Step: Co-ordinating Framework

1. Interdepartmental leadership on POLICY
 - Marine / Envir & Local Govt / Tourism / Transport / Community
2. Involve key tourism and statutory bodies
3. Local Authorities – key implementation agency on ground
 - County or inter-county marine tourism development plans
 - Involving all public agencies in county
 - Formal links with tourism industry
 - Development of marine spatial planning
4. Framework for Product Investment (key issues)
 - Environmental Sustainability
 - Business Potential
 - Business Displacement
 - State Aid Rules
 - Marine Spatial Planning framework – landside and foreshore.

Crystal Ball: 50 Years From Now?

POSITIVE VIEW:

- Ireland is viewed as an internationally recognised brand for marine tourism
- Conservation of the underlying natural environment is the first priority in the 'National Marine Tourism Policy'
- Local Authorities employ experienced marine spatial planners working to a national policy on ICZM
- 'Coastal Environment Studies' is a mainstream subject in the national schools curriculum
- All 'Marine Visitor Centres' in Ireland focus strongly on public education about fish, mammals, aquaculture, pollution, uses of the marine / coastal environment, coastal protection and spatial planning
- The average Irish person is very conversant with marine and coastal issues.

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