

## A study of the Marine Tourism Development Potential in the Carlingford Lough Area

Prepared for Dundalk Chamber of Commerce

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## Table of Contents

	<b>PAGE</b>
<b>Chapter 1 Introduction</b>	<b>10</b>
1.1 Background and Objectives	10
1.2 Research Methodology	10
<b>Chapter 2: Marine Tourism – An Overview</b>	<b>12</b>
2.1 Marine Tourism – A Definition	12
2.2 Marine Tourism – Local Overview	12
2.3 Marine Tourism – National Overview	13
2.4.1 Northern Ireland – Marine Tourism Development Strategy	14
2.4.2 Republic of Ireland – Marine Tourism Development Strategy	15
<b>Chapter 3 Baseline Analysis / Product audit</b>	<b>17</b>
3.1 Marine Tourism Activities:	17
3.1.1 Swimming and Beach Activities	17
3.1.2 Angling	17
3.1.3 Adventure Activity Centres	18
3.1.4 Sailing & Boating	19
3.1.5 Sub Aqua Diving	20
3.1.6 Jet Skiing and Power Boating	20
3.1.7 Boat Cruises	20
3.1.8 Bird Watching	20
3.2 Other Tourist Activities	21
3.3 Visitor Attractions / Places of Interest	21
3.4 Visitor Infrastructure	22
3.5 Facilities / Activities Audit – Carlingford Lough	24
<b>Chapter 4: Gap Analysis and Development Opportunities</b>	<b>26</b>
4.1 Benchmarking	26
4.2 Events	26
4.3 Branding	27
4.4 Visitor Information	28
4.5 Clustering	28
4.6 Tourist Ferry	28
4.7 Cruise Ship Visits	28
4.8 Visitor Moorings	29
4.9 Marina Development	29
<b>Chapter 5 Market Overview</b>	<b>34</b>
5.1 Introduction	34
5.2 Marine Tourism – Global Analysis	34
5.3 International Tourism Analysis	34
5.4 National Tourism Analysis	35
5.5 Northern Ireland Tourism Analysis	37
5.5.1 Profile of Visitors to Armagh & Down Region	38
5.6 Republic of Ireland Tourism Analysis	38

5.6.1	Profile of Visitors to Midlands East Region	40
5.7	Key Target Markets	41
5.8	Tourism Ireland 2007 Marketing Plan	43
<b>Chapter 6</b>	<b>Vision / Development Directions</b>	<b>44</b>
6.1	Overview	44
6.2	Development Directions	44
<b>Chapter 7:</b>	<b>Summary &amp; Recommendations</b>	<b>52</b>

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## Executive Summary

This report examines the development potential for marine recreation and leisure tourism in the Carlingford Lough area. The report includes a study of the existing marine tourism product offering and future development plans and has been carried out by SMM Consulting on behalf of Dundalk Chamber of Commerce.

The report is aimed primarily at local stakeholders and influencers and it is envisaged that the information and findings within it may act as a catalyst to pushing forward projects that will assist in realising the tourism potential of Carlingford Lough. Securing funding will be central to any such projects and with the changing shape of INTERREG funding post 2007, which will see Western Scotland offering partner potential for the East Border Region, it is envisaged the findings of this report may prove timely for identifying suitable projects.

Analysis of tourism trends and consultation with numerous stakeholders clearly shows that Carlingford Lough area has huge potential to be developed and promoted as a leading marine tourism destination. The scenery around Carlingford Lough is breathtaking with the famous Mourne Mountains on the northern shore of the Lough and the Cooley Mountains on the southern shoreline. In addition, the opportunity to sail through the Lough and up to the city of Newry via the Newry Canal is regarded as a strong selling point.

The fact that responsibility for developing and promoting the tourism potential of the northern and southern shorelines of the Lough lies with two separate organisations, namely the Northern Ireland Tourist Board and Fáilte Ireland, has resulted in limited joint initiatives to date. As a result of this, the marine tourism product offering is extremely fragmented and lacks a cohesive approach to clustering the regions built and natural resource.

Marine activity tourism, special interest and wildlife tourism are all growth areas across the world that offer new alternatives to traditional beach holiday resorts. Activities such as kite flying, kite surfing, surfing, waterskiing, jet skiing, surf kayaking, sea kayaking, snorkeling and sub aqua, are increasingly taking place around the coasts, and recreational boat ownership (particularly fast powered craft) is also growing. Maritime events are also popular, drawing large numbers of people and boats.

A study conducted in 2004 valued the global marine tourism industry at €168bn. Marine tourism is forecast to grow substantially over the next five years and is now considered to account for 11% of the world tourism market. As an island nation with over 4,000 miles of coastline, marine tourism presents a significant growth opportunity for Ireland and is central to the overall visitor offering.

Although there are some statistics for individual activities there are no overall statistics for the marine tourism sector in Northern Ireland. With regards to the Republic of Ireland, the Marine Institute estimates for 2003 showed that 1.7m people (1.5m domestic / 240,000 overseas visitors) participate in water based tourism and leisure activities. The sector directly and indirectly employs approximately 8,600 people and generates annual revenue of €631m.

Marine tourism is regarded as a major growth area for Irish tourism and undoubtedly the key product that may help disperse tourism concentration away from the major urban centres, principally Dublin. The Marine Institute estimates the domestic

markets for marine based tourism can be grown to €565m by 2013 (+30% on 2003 figures). Furthermore, the Institute estimates the overseas market to Ireland can be grown to €335m by 2013, an increase of 110% on 2003 figures.

Tourism to the island of Ireland has experienced significant growth over the past decade, with visitor numbers almost doubling during this period. According to Tourism Ireland, the number of overseas visitors to Ireland has continued to increase in 2005, up 5% to 8.1 million. In terms of revenue, the tourism industry was worth almost €4billion to the Irish economy in 2005 (up 8% on 2004).

The home market continues to underpin tourism beyond Dublin and other major urban areas and is likely to increase further in 2006. In the Republic of Ireland the domestic market increased to 7.2million trips (49%) and €1,165m (21%) of total visitor revenue in 2005. In the same period, the Northern Ireland domestic market also increased to 1.4million trips (41%) and £146m (29%) of total visitor revenue.

Market segmentation analysis clearly shows that future marketing efforts should focus on the domestic market which provides 53% of all visitors and 26% of tourism revenue in Ireland. Britain is an important secondary market providing 28% of all visitors and 26% of tourism revenue in Ireland. Combined, these two markets provide 80% of Ireland's visitors.

Considering that 49% of all visitors to Northern Ireland and 53% of all visitors to the Republic of Ireland are from within Ireland, it is obvious that the Irish marketplace provides the best opportunity to attract prospective visitors to Carlingford Lough. Economies of scale would also dictate that the home market would also be the least expensive to target with a marketing campaign.

The importance of the British market must not be overlooked. In 2005 Britain provided 39% of all visitors to Northern Ireland and 50% of total visitor revenue. The British market is equally critical to the tourism industry in the Republic of Ireland providing 25% of all visitors and 23% of total visitor revenue in 2005. Tourism Ireland plan to spend €11.5m on promoting Ireland in the British marketplace during 2007. This is a significant marketing spend and it would be prudent to 'piggyback' this marketing effort by partnering with Tourism Ireland to promote Carlingford Lough.

Although there is no all-island strategy for marine tourism development in Ireland, both the Northern Ireland Tourist Board and Fáilte Ireland have recognised the importance of the sector in recent marketing and development strategies. Both jurisdictions have also recognised the need for an integrated approach to coastal zone management and sustainable marine based tourism.

In Northern Ireland the Department of the Environment (DOE) has undergone an extensive consultation process and is currently finalizing its strategy '*Towards an Integrated Coastal Zone Management Strategy for Northern Ireland (2006-2026)*'. A similar consultation process focusing on marine tourism is also underway in the Republic of Ireland led by the Marine Institute, which has formed a consultation panel to develop '*A National Development Strategy for Marine and Water-based Tourism and Leisure (2007-2013)*'.

The consultation exercise undertaken highlighted the considerable potential for developing the natural and built marine tourism resource in Carlingford Lough, particularly the recreation and leisure sectors, which are currently rather under-

developed. A general audit was conducted to assess the existing product offering and associated facilities, gaps in the product offering, constraining factors and opportunities for future development. It includes a description of the sector (the extent of the resource, related facilities, recreation and leisure use, accommodation and services), and proposals for a strategic plan to direct future development.

The research method used for conducting this report included an analysis of existing information available on the marine tourism, recreation and leisure resource; individual consultations with key informants; and benchmarking of the Carlingford Lough area against other marine tourism focused regions.

The consultation process with various stakeholders identified a willingness and desire for increased partnerships and joint initiatives that will bring people from both sides of Carlingford Lough together. There is widespread acknowledgement that efforts to develop the region and raise its profile to prospective visitors can only be achieved with a commitment from interested parties throughout the Carlingford Lough area to work cohesively to a common goal.

The report identified a number of factors which need to be urgently addressed in order to realise the Lough's true potential, which has been underexploited to date. The marine tourism product offering is extremely fragmented and lacks a cohesive approach to clustering the regions built and natural resource. Many assets are currently under utilised and there are clear gaps in the visitor offering. Key weaknesses facing development of the resource include a lack of appropriate infrastructure, the need for additional moorings and berths, lack of co-ordinated planning for development, fragmented provision of information, fragmented marketing and promotion, and the clear need for marina development.

The key points for consideration are summarised below:

***Branding and Promotion:*** There are a plethora of tourism brands in existence at the moment but the objective of developing Carlingford Lough as a destination for marine based tourism dictates that the area needs to have a strong identity. As such it may be advisable to commission a market research study to analyse visitor and local perceptions of the area.

It is imperative that Carlingford Lough is packaged and branded in a way that positions the area as a '*key tourism attractor*' with the 'must see/must do appeal'. Plans to designate the Mourne as a National Park and the potential to designate the entire Carlingford Lough region as a trans-national Geopark would undoubtedly create the must see/must do appeal in domestic and overseas markets.

It would seem logical to take advantage of and build on existing awareness of the area in the marketplace. In an effort to maximise the awareness of Carlingford Lough and the Mourne Mountains in key target markets such as Ireland and Britain it may be prudent to brand the region as "Carlingford Lough and the Mourne".

This would have a threefold benefit:

1. Exploit the existing awareness of both Carlingford Lough and the Mourne Mountains in key target markets
2. Maximise opportunities that will arise from the planned designation of the Mourne as a National Park
3. Create a feeling of inclusion for communities on both sides of the Lough

In short, a strong brand must be created promoting the entire product offering on Carlingford Lough in a cohesive manner to prospective visitors. There needs to be a clear vision for the future development of the Lough and a joint-up approach to marketing.

***Fáilte Ireland/Tourism Ireland – Influence needed:*** A lobbying approach should be adapted to strengthen relationships with both Fáilte Ireland and Tourism Ireland to develop initiatives which will encourage the regional dispersal of visitors. Considering that 81% of all visitors to Ireland arrive by air, the majority of which arrive via Dublin there is a huge challenge for Tourism Ireland and Fáilte Ireland to address the issue of regional dispersal.

***Visitor Information:*** The provision of information on and the marketing/promotion of Carlingford Lough must be improved. While there is already considerable published information available, it is fragmented and difficult for visitors to conveniently access. A more integrated, co-ordinated and accessible information and marketing/promotional effort would therefore be beneficial. All stakeholders agreed that the already developed brand of ‘*Experience Carlingford Lough*’ should be built upon in marketing efforts for the Lough.

***Clustering:*** The Carlingford Lough brand needs to be developed by all stakeholders around the Lough. Recent INTERREG funded projects have done much to bring people from both sides of the Lough together in a more formalised structure, particularly through event development. This ‘cluster’ approach needs to continue even after the funding period and facilitate a more ‘joined-up’ approach to the marketing and promotional efforts of the Lough. For example the promotion of angling may require guaranteed fishing and the packaging of other products/services including angling guides, accommodation (with suitable facilities such as wet changing and bait storage), boat hire and events. This should be accompanied by associated marketing and promotion.

***Events:*** Tourism organisations throughout the world have realised the significant benefits of hosting high quality events in terms of raising the profile of an area as a visitor destination and generating revenue for the local economy, particularly through bednight occupancy levels. The majority of events in the Carlingford Lough area tend to be quite small and cater more for the local community. There are some indigenous events with excellent potential to be developed as major drivers for developing visitors from outside the immediate catchment area of the Lough.

***Filling Gaps:*** Gaps in infrastructure and product development that hinder the development of marine tourism should be addressed. This includes the development of marina facilities on the northern and southern shores of Carlingford Lough providing increased berths and hence the opportunity to attract more visitors to the region.

***Visitor Moorings:*** Several stakeholders from the consultation process suggested there was a need to provide mooring points around the Lough in order to develop a ‘necklace’ of mooring points for visiting boats. A special set of mooring sites were recently installed as part of the National Network of Visitor Moorings project, a joint effort by Fáilte Ireland, the Department of the Marine and county councils. It must be noted that there has been serious issues around the ownership of these moorings in terms of accident liability and ongoing maintenance, which suggests a similar mooring development project in Carlingford Lough may not be a realistic objective.

**Marina Development:** The key finding to emerge from the report is the need for marina development on both the northern and southern shores of the Lough. There is substantial evidence showing that marina developments can act as a catalyst for significant growth in marine tourism and generally become the hub for on and off-shore recreation and leisure activities. The lack of marina berths is regarded as a major factor constraining growth of a sustainable marine tourism project in the Carlingford Lough area.

Without new marina development the marine leisure sector cannot grow and reach its full potential. Ireland needs an immediate increase in the number of marina berths to cater for the current number of boats. There are currently 25 marinas in Ireland, with approximately 3,800 marina berths in total, a concentration of which are in Dublin and Cork. As an island nation the marine leisure sector is central to Ireland's overall visitor offering. Ireland has 7,500 kilometres of coastline, 700 kilometres of navigable rivers and lakes, and 900 harbours and piers. Nobody is more than 75 kilometres from the sea.

It is estimated that a total of 8,000 marina berths spread around the coast of Ireland are required. Dublin alone needs 3,000 marina berths to cater for the current population if all boat owners kept their boats at the sea. There are an estimated 25,000 boats in Ireland, equating to a ratio of 1 boat per 172 people. This is well under the UK average of 1 per 106 and much lower than the European ratio of 1 boat per 46 people.

Considering the number of boats in Ireland and the shortage of marina berths it is clear that additional marina development is required for Carlingford Lough. There are several options for marina development on Carlingford Lough currently being assessed by a number of interested parties.

**Tourist Ferry:** A long-standing proposal for a 'tourism' ferry between Greenore on the southern shore and Greencastle on the northern shore remains active. However, strong resistance from residents continues to halt the establishment of such a linkage. A ferry link would provide a natural link from both sides of the Lough and would be an important link from the main Belfast to Dublin motorway to the proposed Mourne National Park. Recently a private operator has received funding to operate a foot passenger ferry between Omeath and Warrenpoint. A further proposal for a bridge at Narrow-water has also been made on a number of occasions and is still under review.

**Cruise Ship Visits:** Carlingford Lough is by its nature not an ideal destination for large cruise ships. However, the area has a sufficient mix of activities, attractions, restaurants, bars and entertainment venues to easily cater for smaller cruise boats from Scandinavia and Scotland for example. Both Greenore and Warrenpoint Harbour have expressed interest in facilitating the entry of small cruise liners into the Lough. The cruise line market offers substantial opportunity but will take time and effort to secure, requiring a dedicated business development staff resource.

**INTERREG Funding 2007-2013:** The INTERREG IVA 2007-2013 funding programme includes Northern Ireland, border counties of the Republic of Ireland and the west coast of Scotland. It has been designed to encourage projects that can demonstrate interregional, cross border and trans-national co-operation. Regions within a maximum of 150km between border areas will be permitted to partner with each other, which will allow partnership working with Western Scotland.

Carlingford Lough is in a prime position to take advantage of these funding opportunities due to its geographical location, straddling both the Northern and Southern shorelines and therefore two states namely the UK and Republic of Ireland. Moreover, its close proximity to key areas in Scotland such as Dumfries and Galloway or Ayrshire and Arran will provide partnership opportunities for tri-national co-operation.

**Investment Needs:** There should be a comprehensive market-led assessment of the investment needs for developing marine tourism in the Carlingford Lough area. This should incorporate investment required for potential “gaps” such as marina development, infrastructure, specialist activities and services, and information/marketing and promotion.

**Need for Working Group and dedicated Project Manager/Team:** If the area is serious about realising its vision of establishing a sustainable marine tourism industry, it is envisaged that this cannot be achieved solely through a voluntary committee but must involve an employed dedicated staff resource.

**Integrated Planning:** Any effort to develop Carlingford Lough as a leading tourism destination for marine based recreation and leisure activities will have obvious benefits for the wider economy. A project such as this will need support from various stakeholders including local authorities, public bodies, tourism providers, activity providers, local tourism working groups, local traders, tourism organisations and community groups.

It is, therefore, imperative that any strategy or action plan devised is consistent with and easily integrated with strategies developed at a national level by organisations such as Northern Ireland Tourist Board, Fáilte Ireland, Tourism Ireland, the Marine Institute, the Loughs Agency, Armagh Down Regional Tourism Partnership, and East Coast and Midlands Tourism.

## **Chapter 1 Introduction**

### **1.1 Background and Objectives**

This report assesses the current marine based recreation and leisure product offering in the Carlingford Lough area and evaluates the potential for developing a sustainable marine tourism industry.

The Carlingford Lough area includes Carlingford Lough and the rivers flowing into it from counties Louth, Down and Armagh, a total area of about 900 km<sup>2</sup>. For the purpose of this report the Carlingford Lough area can be defined as the sea along the coast between the most southerly part of Cranfield in County Down to the most easterly point of Ballagan Point on the Cooley Peninsula in County Louth, and within a straight line of these points.

There have been a number of studies focussing on different aspects of marine tourism in the Carlingford Lough area in the past, many of which have sited the tourism potential of the area. Equally there is a general consensus amongst local communities and interested parties around the Lough that the area's natural assets have been under exploited to date and there is a need for a strategic approach to ensure this potential is realised.

The principal objectives of the report are to:

- Assess the current state of the natural and built marine tourism resource in Carlingford Lough
- Assess the level of marine tourism activities currently on offer
- Identify gaps in the product offering
- Identify factors constraining the development of Carlingford Lough's tourism potential
- Evaluate the true potential to develop and promote the area as a leading marine recreation and leisure focussed visitor destination
- Make recommendations that may form part of a future strategic development plan for the Carlingford Lough area

This report is aimed primarily at local stakeholders and influencers and it is envisaged that the information and findings within the report may act as a catalyst to pushing forward projects that will assist in realising the tourism potential of Carlingford Lough. Securing funding will be central to any such projects and with the changing shape of INTERREG's funding post 2007, which will see Scotland offering partner potential for this East Border Region, it is envisaged the findings of this report may prove timely for identifying suitable projects.

### **1.2 Research Methodology**

This plan is derived from a combination of desk research and one to one consultations with key stakeholders around Carlingford Lough. The method used for carrying out this report incorporated the following key research elements:

- Analysis of previous reports and studies on various aspects of marine tourism in Carlingford Lough and at national level
- Consultations with key informants with an interest in developing the marine tourism potential of Carlingford Lough, including local authorities, the Loughs Agency, regional tourism authorities, port authorities, marina proprietors, sailing clubs, adventure centres and key individuals
- Analysis of tourism statistics at regional, national and international levels, with specific focus on marine tourism sectors and trends

## Chapter 2: Marine Tourism – An Overview

### 2.1 Marine Tourism – A Definition

The growth of the tourism sector is increasingly being accompanied by demands for higher quality tourism experience and variation in tourism activities. This has spurred interests in what is often termed as ‘special interest tourism’, liberally interpreted to include educational travel, art and heritage tourism, ethnic tourism, nature-based tourism and sport and health tourism. One of these pursuits includes marine or sea-based tourism.

The most commonly used definition of tourism *“denotes a temporary short-term movement of people to destinations outside their normal environment and activities”*. This definition when extended to the marine tourism industry could therefore mean that marine tourism is *“a temporary short-term movement of people to destinations outside their normal environment and activities within a marine setting”*.

There has been much debate as to whether marine tourism activities should include on shore activities such as cycling and hiking or whether this should be limited to off-shore water-based activities such as angling and sailing. What is indisputable, however, is the fact that the economic benefits of water based recreational activities do not stop on the shoreline but extend well inland to accommodation providers, retailers, bars, restaurants and many other businesses.

### 2.2 Marine Tourism – Local Overview

Carlingford Lough has huge potential to be developed and promoted as a leading marine tourism destination, although this potential has not been exploited to date. The scenery is breathtaking with the famous Mourne Mountains on the northern shore of the Lough and the Cooley Mountains on the southern shoreline. The area has built a reputation as a popular day trip destination, particularly with the domestic family market. The small town of Warrenpoint on the northern shore and the village of Carlingford on the southern shore are the tourist hubs for the majority of visitors.

The fact that responsibility for developing and promoting the tourism potential of the northern and southern shorelines of the Lough lies with two separate organisations, namely the Northern Ireland Tourist Board and Fáilte Ireland, has resulted in limited joint initiatives to date. As a result of this, the marine tourism product offering is extremely fragmented and lacks a cohesive approach to clustering the regions built and natural resource.

There is widespread acknowledgement that efforts to develop the region and raise its profile to prospective visitors can only be achieved with a commitment from interested parties throughout the Carlingford Lough area to work cohesively to a common goal. Many assets are currently under utilised and there are clear gaps in the visitor offering. Key weaknesses facing development of the resource include a lack of appropriate infrastructure, the need for more moorings and berths, lack of co-ordinated planning for

development, fragmented provision of information, fragmented marketing and promotion, and the clear need for marina development on both sides of the Lough.

### 2.3 Marine Tourism – National Overview

Marine activity tourism, special interest and wildlife tourism are all growth areas that offer new alternatives to traditional beach holiday resorts. Activities such as kite flying, kite surfing, surfing, waterskiing, jet skiing, surf kayaking, sea kayaking, snorkeling and sub aqua, are increasingly taking place around the coasts, and recreational boat ownership (particularly fast powered craft) is also growing. Maritime events are also popular, drawing large numbers of people and boats.

Marine tourism is forecast to grow substantially over the next five years and is now considered to account for 11% of the world tourism market. As an island nation with over 4,000 miles of coastline, marine tourism presents a significant growth opportunity for Ireland and is central to the overall visitor offering.

Although there are some statistics for individual activities there are no overall statistics for the marine tourism sector in Northern Ireland. With regards to the Republic of Ireland, the Marine Institute estimates from 2003 showed that 1.7m people (1.5m domestic / 239,000 overseas visitors) participate in water based tourism and leisure activities. The sector directly and indirectly employs approximately 8,600 people and generates annual revenue of €631m.

Marine tourism is regarded as a major growth area for Irish tourism and undoubtedly the key product that may help disperse tourism concentration away from the major urban centres, principally Dublin. The Marine Institute estimates the domestic markets for marine based tourism can be grown to €565m by 2013 (+30% on 2003 figures). Furthermore, the Institute estimates the overseas market to Ireland can be grown to €335m by 2013, an increase of 110% on 2003 figures as shown in the table below:

Product	Domestic Value €m 2003	Domestic Value €m 2012	Overseas Value €m 2003	Overseas Value €m 2012
<b>Seaside &amp; Coastal Trips</b>	290	380 (+31%)	(no overseas figure available)	50
<b>Angling</b>	59	65 (+10%)	55	80 (+45%)
<b>Boating &amp; Sailing</b>	50	70 (+40%)	19	40 (+110%)
<b>Water Sports</b>	35	50 (+43%)	19	35 (+84%)
<b>Cruise Ships</b>	N/A	N/A	66	130 (+97%)
<b>Total:</b>	<b>€434</b>	<b>€565 (+30%)</b>	<b>€159</b>	<b>€335 (+110%)</b>

Source: Marine Institute

Unfortunately there is no all-island strategy for marine tourism development in Ireland, although both the Northern Ireland Tourist Board and Fáilte Ireland have recognised the importance of the sector in recent marketing and development strategies. Both jurisdictions have also recognised the need for an integrated approach to coastal zone management and sustainable marine based tourism.

In Northern Ireland the Department of the Environment (DOE) has undergone an extensive consultation process and is currently finalising its strategy '*Towards an Integrated Coastal Zone Management Strategy for Northern Ireland (2006-2026)*'. A similar consultation process focusing on marine tourism is also underway in the Republic of Ireland led by the Marine Institute, which has formed a consultation panel to develop '*A National Development Strategy for Marine and Water-based Tourism and Leisure (2007-2013)*'.

#### **2.4.1 Northern Ireland – Marine Tourism Development Strategy**

The coast of Northern Ireland is highly valued for its scenic beauty, rich in wildlife and economic importance to local communities. However, there are increasing pressures being placed on this natural resource and a growing recognition within the European Commission that coastlines should be managed in a strategic, integrated and sustainable way.

The DOE led strategy '*Towards an Integrated Coastal Zone Management Strategy for Northern Ireland (2006-2026)*' is intended to set out long-term objectives for achieving sustainable coastal management, through improvements to existing management systems, the development of new management systems and identifying and dealing with potential areas of conflict. The overarching objective of the strategy is to ensure that the economic, social and environmental future of the Northern Ireland coastal area is secured for both local communities and visitors alike.

Much of Northern Ireland's tourism activity is focused around the coastline and several key resorts rely to some degree on seasonal tourism income. The Northern Ireland Tourist Board (NITB) has recognised the importance of the coastline to the Northern Ireland economy in its own strategy and in an advisory capacity assists to maintain the visual appeal of Areas of Outstanding Natural Beauty (AONBs) in Northern Ireland, including their coastlines.

To date, however, there has been no strategic planning for marine or coastal tourism on a Northern Ireland wide basis and little reference within tourism planning to the interface with other coastal zone sectors.

One of the most important tasks for ICZM is the development of a shared vision about the coastal zone. This strategy proposes a vision for:

*A coastal zone which through an ecosystem approach and the sustainable management of natural resources supports a vibrant, viable and informed population, and which contributes strongly to the overall economy...*

## 2.4.2 Republic of Ireland – Marine Tourism Development Strategy

The Marine Institute has been requested by the Department of Communications, Marine and Natural Resources to advise on the development of marine and water-based tourism and leisure. As such, a '*National Development Strategy for Marine and Water-based Tourism and Leisure (2007-2013)*' is being prepared under the guidance of a High Level Working Group with members drawn from key Departments, national and regional tourism agencies and Local Authorities.

The working group has been asked to consult closely with Fáilte Ireland and Tourism Ireland to ensure that final proposals dovetail with those being put forward for the general development of tourism in the forthcoming National Development Plan 2007-2013. Following recent consultation with key stake holders the group have identified the key issues and challenges facing the sector and have set out a development vision for the year 2020 and proposed a set of development objectives to be pursued during the period 2007-2013.

### Vision for Marine Tourism 2020

Stakeholders consider that marine and water leisure will be a major component of the Irish tourism product suite, comprising the following main elements:

- Exciting experiences and activities set in a pristine natural environment
- Strong market recognition for key signature products that have wide appeal to holidaymakers
- Fully packaged holidays linked to first class niche products of international repute
- Integrated web-driven marketing of product themes and clusters

Quality will be more important than price to overseas visitors and Ireland will have a range of high value added products around angling, beach holidays, water sports, coastal and inland boating, visiting cruise liners, all contributing to a much greater regional distribution of tourism revenue.

### Objectives for 2013

- 1) Increase domestic and overseas tourism revenue from €630m to €900m by focussing on the development of :
  - *Key signature products* linked to an international marketing campaign
  - *Highly attractive niche products* to contribute to increasing the demand for holiday experiences in regional / rural Ireland
- 2) Develop *innovative approaches to commercial investment* in this sector, taking account of the unique situation arising from public ownership of much of the asset (e.g.: rivers, foreshore, beaches, harbours etc.) and the opportunity to attract private investment for its development
- 3) Support the development of *resource access and management policies* that will lead to the creation of sustainable tourism and recreational opportunities
- 4) *Support environmental and resource management and protection strategies*, which will lead to the optimal use of marine / inland water resources for tourism and leisure
- 5) Establish a strong *marine tourism brand* to effectively market marine and water based tourism products and services, which meet agreed national/international standards

In relation to the aforementioned objectives the identification of signature and niche products will become the 'packaged offerings' through which all marketing activity is driven. As such, it is imperative that Carlingford Lough is packaged and branded in a way that positions the area as a 'key tourism attractor' with the 'must see/must do appeal'. Plans to designate the Mourne as a National Park and the potential to designate the entire Carlingford Lough region as a trans-national Geopark would undoubtedly create the must see/must do appeal in domestic and overseas markets. A strong lobbying approach must also be adapted with key influencers such as the Marine Institute, Loughs Agency, Northern Ireland Tourist Board, Fáilte Ireland and Tourism Ireland to ensure Carlingford Lough is high on the agenda when considering Ireland's key marine tourism destinations.

Five indicative signature product themes are proposed for the marine tourism sector:

- 1) *Escape to the Islands* – and island experience linked to culture, language, nature, traditional boats, fishing, and walking
- 2) *Themed Cruising Routes on the Inland Waterways* – (potentially and all-island initiative), taking in family activities, historical and cultural sites and events, restaurants and other places of interest
- 3) *Tour of the Irish Coast* – driving, cycling, walking routes themed around visiting small ports and harbours, places of special beauty and noted seascapes, and quality seafood
- 4) *Signature Seaside Resorts* – linked to blue flag beaches, family activities, watersports and activity centres
- 5) *Cruise the South West Coast* – leisure boating along the South West coast, taking in bays, harbours, islands, marinas, pubs and restaurants, festivals and events

## Chapter 3 Baseline Analysis / Product audit

An audit of the current marine-related tourism product offering was undertaken, involving five key phases:

- A review of relevant documentation
- In-depth consultations with marina managers, ports, sailing clubs, activity centres, accommodation providers and other stakeholders
- Consultations with relevant authorities (Loughs Agency, Newry & Mourne, Louth County Council, Chambers of Commerce)
- Site visits around the Carlingford Lough coastline
- Technical analysis

The information provided by the audit is summarised in this chapter, organised by type of marine leisure activity and infrastructure.

### 3.1 Marine Tourism Activities

#### 3.1.1 Swimming and Beach Activities

Cranfield beach is the most popular beach in the Carlingford Lough area, having gained Blue Flag status in 2004. The gently sloping, mainly sandy beach is located at the entrance to Carlingford Lough and has been designated as being of Special Scientific Interest. Facilities include parking, children's play area, toilets and showers. It has an adjacent caravan site and attracts many caravan residents during the summer period.

Warrenpoint beach is popular during summer months with the family day-trip market and is used for general family activity, swimming, jet-ski launches and windsurfing. Carlingford Town beach (beside the harbour access) is popular with local people for wind surfing, canoeing and dinghy access.

#### 3.1.2 Angling

Although the Carlingford area has good fishing opportunities for anglers it is not particularly well known compared with other regions in Ireland. A recent report undertaken by the Loughs Agency concluded that little was known about its level of fish stocks and fish catches.

Angling services are limited in the area, with very few tackle and bait shops or professional ghillies/guides. Carlingford Lough hosts a variety of over 50 specimens of fish, including ray, turbot, dogfish, mullet, flounder, sea bass, and currently holds the Irish record for tope (66½ lbs). Sea angling trips are popular in the area and boat trips are currently available through two privateers, namely Oliver Finnegan (proprietor of the Sharon Michéle) and Peter Cunningham (proprietor of The Piscies II).

Shore fishing is most popular at Carlingford pier with dogfish, flatfish, occasional ray, and conger. Around the edges of the Lough from Ballagan point south of Greenore to Cranfield point on the eastern side there are a number of locations where bass and sea trout can be found. The fish will find herring and mackerel fry as well as sand eels and crabs to feed on. This combined with a powerful tide rip makes for an exciting shore

fishing venue. There is also the opportunity to fish the wrecks just outside the Lough for pollack, ling, whiting, codling, conger etc.

Game and coarse fishing is provided on the rivers Whitewater and Clanrye (game) and on the Newry Canal (coarse). Game fishing is mainly for trout, while coarse fishing on the Canal provides pike, roach and bream. The Newry Canal provides year-round coarse fishing and has an international reputation, once hosting the World Coarse Angling Championships.

Overall the angling product on Carlingford Lough is not particularly strong and needs significant development, particularly in how the product is packaged. To successfully target anglers the trip needs to be made as simple as possible. The lack of hire and bait shops throughout the Carlingford Lough area is a major issue which needs addressed.

Sports fishing is one of the latest additions to the marine-based recreation market. There is potential for development in this area, and sports fishing market may even be able to support the establishment of small to medium scale industries to support the need of anglers in areas such as the production of fishing equipment, provision of tackles and baits and small crafts construction.

The successful promotion of angling may require guaranteed fishing and the packaging of other products/services including angling guides, accommodation (with suitable facilities such as wet changing and bait storage), boat hire and events. This should be accompanied by associated marketing and promotion. It is essential to realise the importance of promoting an areas angling assets and ensuring the following aspects of an angling trip are available:

- Availability of good information in appropriate locations
- Availability of good accommodation (with wet change facilities & bait storage)
- Availability of tackle shops (rod hire, equipment & bait purchase etc...)
- Availability of local angling guides/ghillies

The domestic market for angling is considerable with at least 200 angling clubs or associations operating in Ireland. A Marine Institute Study carried out in 1996 found that 190,000 people in the Republic of Ireland participate in angling on a regular basis, with game angling having about 75,000 participants and shore/sea angling having some 90,000 participants. Angling is also popular in Northern Ireland, with approximately 11,000 members in the main representative angling body, the Ulster Angling Federation.

### **3.1.3 Adventure Activity Centres**

Carlingford is particularly well known for activity sports and has three adventure centres offering activity programmes and accommodation, namely Carlingford Adventure Centre, Táin Adventure Centre and Killowen Outdoor Education Centre. Each of the centres provide a range of activities for the education, visitor and corporate markets including water based activities such as yachting, dinghy sailing, water skiing, canoeing/kayaking and windsurfing; as well as land-based activities such as archery, horse riding, rock climbing. Carlingford is also known as a yachting location, with a marina and yacht charter/sailing school.

Each of the outdoor activity centres offer sea-kayaking training, although this is normally conducted in sheltered waters in proximity to the centres. Sea kayaking is of most

interest around the Haulbowline Lighthouse, limestone reefs, and Blockhouse Island for more experienced kayakers.

A number of stakeholders suggested that the reputation of the area as an adventure sports destination would be greatly enhanced if a section of the harbour in Carlingford was suitably developed and zoned for use by individual and commercial water sports users in a safe environment.

### **3.1.4 Sailing & Boating**

Sailing takes place primarily from yacht clubs and the privately operated marina at Carlingford. There are four boat clubs in the in the Carlingford Lough area, namely:

- Carlingford Lough Yacht Club, based in Killowen
- Carlingford Sailing Club, based in Carlingford
- Warrenpoint Boat Club
- Rostrevor Boat Club

Sailing and boating has been defined by the Irish sailing Association (ISA) as:  
*“A recreation involving either a sail or engine powered boat, irrespective of size, used in a variety of activities ranging from high performance Olympic competition to cruising at a leisurely pace.”*

The main forms of sailing and boating can be categorised as:

- Dinghy sailing
- Cruiser sailing
- Motor cruising (Coastal and Inland Waterways)
- Power boating
- Windsurfing
- Personal watercraft

Traditionally the core activity of sailing clubs has centred on racing activities. There is a growing focus on recreational and non-competitive sailing and clubs have had to change in recent years to address the shift in this direction. The two main sailing clubs on Carlingford Lough, namely Carlingford Lough Yacht Club (based in Killowen) and Carlingford Sailing Club (based in Carlingford) have taken great steps to modernise their structures and strategies in order to meet this challenge.

Various research studies indicate a growing participation in sailing and boating outside the existing club structures. Growth in the sales of marine craft and the development of new marinas and shore-based facilities throughout Ireland provide further evidence of this trend of casual participation in sailing and boating activities. There is concern that this growth must be managed in a progressive and safe fashion in the wider interest of all involved in sailing and boating activities.

Many clubs are experiencing significant demand for change to meet the needs of both existing and potential members. Both clubs for example have introduced more formal training structures and deliver regular training and coaching programmes through dedicated personnel with professionally recognized training qualifications. Both clubs are committed to growing their membership base and emphasise that the club has an open door policy to new members wishing to take up the sport.

### **3.1.5 Sub Aqua Diving**

Carlingford Lough has a range of dive sites and has two active sub-aqua clubs in the area, namely Newry and Mourne Sub-Aqua Club and Dundalk Sub-Aqua Club. The area is not as popular with divers as the north or west coast although local angling boat providers do offer their boat for dive charter.

Dundalk sub-aqua club has a fully trained and active search and recovery unit, which has assisted on various search and recovery operations in the north east region of Ireland. The Club is currently in negotiations with Carlingford Sailing Club with a view to move their operations to the Carlingford sailing club site. This would be an important development for the Lough in terms of safety as the Club could form part of search and rescue strategy.

### **3.1.6 Jet Skiing and Power Boating**

Jet skiing has become increasingly popular in recent years. The most popular area for jet skiing is at Cranfield beach, which has been used as a competition venue in the past. Jet skiing also takes place at Warrenpoint and Carlingford. Cranfield is among the busiest locations in Ireland for jet skiing and is managed by Newry & Mourne Council. A special zone has been set up for jet skiers to ensure the safety of swimmers.

Power boating has become increasing popular in recent years and has now become an integral part of many sailing clubs. There are two recognised powerboat schools in the area at Carlingford Sailing Club and Carlingford Lough Yacht Club. High speed RIBs (rigid inflatable boats) have become very popular and currently represent the largest category of new boat sales. Both speedboats and high speed RIBs are capable of travelling to large distances relatively quickly.

Events known as 'RIB Raids' regularly take place throughout Ireland, although there are no such events held in Carlingford Lough. The biggest RIB raid event in Europe takes place from Donaghadee in County Down to Portpatrick in Scotland and attracts up to 100 RIB enthusiasts. There is an excellent opportunity to organize a RIB Raid event or high speed cruise event around Carlingford Lough to showcase the area's scenery and attract significant numbers of visitors to the area as part of a larger festival.

### **3.1.7 Boat Cruises**

There is considerable potential for an operator to provide scenic boat cruises around Carlingford Lough stopping off at various points, similar to the Toucan 1 boat operated by Foyle Cruise Line on Lough Foyle. Although there is currently no dedicated provider of boat cruises on Carlingford Lough, some sea angling and dive boats diversify at times to provide scenic boat trips.

Carlingford Marina plans to operate a 'sea safari' type service in 2007 on high speed boats with a capacity to carry 12 people. Numerous trips will be on offer, including trips to the Isle of Man.

### **3.1.8 Bird Watching**

Carlingford Lough contains Special Protection Areas for Birds (SPA) designated under the EU Birds Directive, Areas of Special Scientific Interest, and Ramsar sites. The area is an ideal place to watch birds, both for beginners and for experts. The combination of

habitats include the wide area of mudflat and sand-flat in Carlingford Bay, the Loughs' estuarine character, beaches of both shingle and sand to the south, mountain and woods in the surrounding countryside, hedgerows, reed beds, marsh, streams and small ponds along the shore. The receding tides of Carlingford Lough expose vast mudflats inland from the town of Warrenpoint, an area which sustains a large and diverse population of waterfowl and waders.

A wide variety of bird species can be found all year round, but is probably best during the winter months (September to April). Species include 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. The National Trust owns Green Island off Greencastle on the northern shore and manages the island as a refuge for the large population of tern.

### **3.2 Other Tourist Activities**

Golf, cycling, walking and equestrian activities are popular in the area. Golf is particularly well developed on the northern side of the Lough as the area is particularly well placed as a destination for golf, being part of the well regarded Co. Down golf product.

The area surrounding Carlingford Lough make the area a superb walking or cycling destination, offering a wide range of walks that cater for a broad range of fitness, ability and experience, from flat easy coastal routes to testing slopes and mountains. The famous Táin Way - a national waymarked walking route covers a 40km circuit of the Cooley Mountains on forest tracks, mountain paths and country roads. The majestic mountains of Mourne and the Ring of Gullion areas provide an outstanding backdrop for walkers of all types.

### **3.3 Visitor Attractions / Places of Interest**

There are no leading visitor attractions located in the Carlingford Lough area, but there are a number of small visitor attractions and popular forest parks. The main visitor attractions are listed below:

- Newry & Mourne Museum - Currently located in the Arts Centre, the museum will relocate to Bagenal's Castle in early 2007.
- Kilbroney Park – The forest park offers riverside walks, arboretum and a two-mile forest drive to panoramic views over Carlingford Lough.
- Narrow Water Castle - Excellent example of a tower-house and bawn built about 1568 at a point where the Newry River meets Carlingford Lough. In the care of the Environment and Heritage Service.
- Greencastle Royal Castle - This royal castle guarded the entrance to Carlingford Lough in medieval times. It was besieged by Edward Bruce in 1316 and maintained later as a garrison for Elizabeth I.
- Holy Trinity Heritage Centre - The beautifully restored medieval church of the Holy Trinity is home to Carlingford's history from Viking Times to the present day.
- Carlingford Village – It is considered to be Ireland's best-preserved medieval village, with 3 castles and 2 abbeys. A guided tour is available and includes an

easy walk to numerous Norman ruins including King John's Castle (1210), the 15th century Mint and the Dominican Friary (1305).

### **3.4 Visitor Infrastructure**

#### Accommodation

A key requirement for developing an area as major tourism and recreational centres is availability of visitor accommodation. There are over 800 rooms available for visitors to the Carlingford Lough area.

Accommodation: Northern Shore

Bed spaces in Newry: (481 hotels, B&Bs, self-catering), Bed spaces in Warrenpoint: (51 B&Bs, self-catering), Bed spaces in Rostrevor: (90 B&Bs, self-catering)

Accommodation: Southern Shore

Bed spaces: 150 serviced rooms (mixture of approved hotel and B&Bs only)

Overall, the accommodation base in the area is limited. Rostrevor and Omeath are mainly hostel and caravan/camping centres, while some hotels are found in Newry and Carlingford, the two major ones being the Canal Court Hotel in Newry and the newly built Four Seasons Hotel in Carlingford. There are plans to develop a small hotel in Warrenpoint which will be a major boost to the industry on the northern shore.

There is a limited amount of accommodation available tailored specifically for marine tourism visitors, specifically activity/budget type accommodation, such as the Foy Centre or Carlingford Adventure Centre. There is also a limited amount of accommodation available tailored for angling visitors, e.g. 'fishing lodge' type accommodation.

#### Public Transport

For travel within Ireland, the Carlingford Lough area is relatively well served by road but not by rail however. The nearest station is Newry or Dundalk Railway station. Public transport to and from Carlingford is quite poor.

#### Roads Infrastructure

The Carlingford area is virtually equidistant between Dublin and Belfast on the M1/A1 road route as well as being served by the Dublin-Belfast rail service (at Newry and Dundalk). The ongoing motorway improvement programme linking Belfast and Dublin via dual carriageway has greatly enhanced the area's connectivity to both cities and has considerably lessened travel times for visitors. Much has been done to upgrade the link road from Dundalk to both Greenore and Carlingford over the past decade and it is now above the standard of many primary roads in other parts of the country. There are also good road links to Armagh, Dungannon, Cookstown and Portadown. There is a reasonable level of access to the major air and sea ports on the east coast of Ireland (Dublin, Belfast).

A long-standing proposal for a bridge at Narrow-water has been made on a number of occasions and is still under review. In addition, a proposal has been made for a Newry Southern Bypass to improve connection from Warrenpoint Port, South Down and the Mourne to the main M1/A1 transport corridor. The proposed Newry Southern Bypass

involves the construction of a single carriageway road linking the A2 Warrenpoint Road trunk road to the A1 a key link corridor.

### Evening Economy

The popularity of towns and villages on the shores of Carlingford Lough, particularly Warrenpoint, Rostrevor, Omeath and Carlingford has led to the development of a strong evening economy with a good selection of quality restaurants and pubs. The city of Newry has attracted huge levels of investment over the past decade and is now a popular destination for nightclubs and disco bars.

Many publicans provide musical entertainment throughout the week and at weekends, which has considerably improved the overall visitor experience. There are numerous events throughout the year which attract thousands of people from the local area and visitors alike, including leading events such as the Blues on the Bay Festival in Warrenpoint, Fiddlers Green Festival in Rostrevor and the Carlingford Oyster Festival.

### 3.5 Facilities / Activities Audit – Carlingford Lough

The table below provides a breakdown of marine tourism activities on offer in Carlingford Lough:

	Angling guides	Boat building / maintenance	Boat Sales	Club / Association Fishing	Charter / Hire	Engineering / electronics	Ferry Trips / Boat cruises	Harbours	Jet Skiing	Land tuition / safety	Maintenance / repair	Marina	Moorings	Pontoons	Quays	Retail / Chandlery	Rigging / sail maker	Slipways	Tackle shops	Training – canoe / kayak	Training / Diving	Training sail/power	Watersports / outdoor	Wildlife & bird watching
Carlingford Marina		√		√										√		√		√						
Carlingford Sailing Club		√		√												√		√				√		
Carlingford Adv Centre																					√		√	
Táin Adventure Centre							√																√	
Carlingford Lough YC				√												√		√				√		
Killowen Outdoor Centre																		√		√			√	
Warrenpoint Boat Club				√														√						
Rostrevor Boat Club				√														√						
Sharon Michélé					√																			
Piscies II							√																	
Oriel Angling	√																							
Carlingford								√				√	√					√						
Rostrevor													√		√									
Warrenpoint								√					√	√				√						
Greenore Port								√																
Omeath																		√						
Cranfield																		√						
Greer's Quay (Táin Centre)															√									
Greencastle													√		√									
Albert Basin														√	√									

The following table summarises the capacity and potential to meet the requirements of marine tourism visitors under the main priority headings:

Key Component	Evaluation	Carlingford Lough Potential offer / Current suitability rating
<b>Accommodation</b>	<ul style="list-style-type: none"> <li>➤ Overall range is limited</li> <li>➤ Very limited self-catering</li> <li>➤ Little packaging of activities &amp; accommodation</li> <li>➤ No obvious focus on marine tourism</li> </ul>	<b>Medium</b>
<b>Attractions</b>	<ul style="list-style-type: none"> <li>➤ No major visitor centres or renowned attractions</li> <li>➤ Scenery – mountains &amp; water key</li> <li>➤ Carlingford village has much historical interest</li> <li>➤ Newry appeal for retail</li> <li>➤ Small boutiques in Carlingford</li> </ul>	<b>Medium / High</b>
<b>Activities</b>	<ul style="list-style-type: none"> <li>➤ Strong activity centre base</li> <li>➤ Increased interest in canoeing / kayaking</li> <li>➤ Potential for motor-boat cruising</li> <li>➤ Important activity centres for waterskiing &amp; jet skiing (some conflict)</li> <li>➤ Power boating activity is strong</li> <li>➤ Since arrival of mussel fishing – quality of shore based sea angling has reportedly diminished</li> <li>➤ Sea angling has potential to develop</li> <li>➤ Limited wildlife / bird watching</li> <li>➤ Walks linked to Táin Trail and Mournes</li> <li>➤ Cranfield good for watersports but congested</li> <li>➤ Potential to develop diving / eco-tourism trips</li> <li>➤ Activity summer &amp; training programmes</li> <li>➤ Competition &amp; events (currently INTERREG funded)</li> </ul>	<b>Medium</b>
<b>Facilities</b>	<ul style="list-style-type: none"> <li>➤ Not enough visitor berths</li> <li>➤ Lack of visitor moorings</li> <li>➤ Limited beach offering (with exception of Cranfield)</li> </ul>	<b>Low</b>
<b>Hire facilities</b>	<ul style="list-style-type: none"> <li>➤ No hire facilities available – potential to develop hire facilities for various activities e.g.: angling, cycling, diving</li> </ul>	<b>Low</b>
<b>Management</b>	<ul style="list-style-type: none"> <li>➤ No management team in place to initiate or oversee cross border projects throughout the Lough</li> <li>➤ No management team/staff resource to promote the Lough as a visitor region</li> <li>➤ No integrated coastal zone management strategy</li> </ul>	<b>Low</b>
<b>Marketing</b>	<ul style="list-style-type: none"> <li>➤ Lack of integrated marketing approach</li> <li>➤ Responsibility for promotion lies with two different organisations in separate jurisdictions, namely NITB and Fáilte Ireland</li> <li>➤ Area has not been strongly branded or promoted as a single region</li> </ul>	<b>Medium</b>
<b>Transport</b>	<ul style="list-style-type: none"> <li>➤ Limited parking spaces in Carlingford village</li> <li>➤ No ferry</li> <li>➤ Public transport very limited and does not serve activity sites</li> </ul>	<b>Low</b>

## Chapter 4: Gap Analysis and Development Opportunities

This section examines the gaps in infrastructure and product development hindering the development of marine tourism in Carlingford Lough. A number of development opportunities are also highlighted which may act as catalysts to realising the marine tourism potential of the area.

### 4.1 Benchmarking

There is no doubt that Carlingford Lough has the scenery and natural assets to become a leading marine tourism visitor destination, but this will require the correct branding, promotion, packaging and development of market-led product offerings. The '*Atlantic Drift*' project in North West Ireland is an example of how a region can be packaged to promote its marine tourism product. The project links the areas of the Donegal Gaeltacht & the Islands, North Donegal & Inishowen, and Limavady & the Roe Valley by promoting the visitor attractions and activities in these areas under the '*Atlantic Drift*' brand.

It is always useful to benchmark against leading destinations to gain an insight into how an area becomes successful. Over the past 30 years Kinsale Tourism have taken their natural resources and platform what has now become the Kinsale brand onto the radar of overseas visitors. Products such as the Good Food Circle, which is promoted in the US on Saint Patrick's Day when twelve Kinsale based chefs take over the kitchens of Newport, Rhode Island, have the effect of placing Kinsale and its reputation for seafood in front of the US public.

Similarly the French town of Lorient in Brittany has transformed itself into a leading European centre for marine tourism. Lorient is a town of 60,000, smaller than the Greater Newry and Dundalk area. A total of €48m has been invested in leisure in the past decade. The bay now boasts five large marinas in public ownership and six major event centres, which has resulted in marine leisure now becoming the major employer and contributor the local economy.

### 4.2 Events

Regional tourism organisations throughout the world have realised the significant benefits of hosting high quality events in terms of raising the profile of an area as a visitor destination and generating revenue for the local economy, particularly through bednight occupancy levels. The majority of events in the Carlingford Lough area tend to be quite small and cater more for the local community. There are some indigenous events with excellent potential to be developed as major drivers for developing visitors from outside the immediate catchment area of the Lough. A small number of key indigenous events across the Lough should be selected to receive priority development and promotion so as to act as 'hooks' to attract visitors in the main target markets beyond the local community. The main annual events are listed below:

- Ceol Chairlinn (January) - The Carlingford Traditional Music Winter School each January, with workshops in fiddle, button accordion, flute, banjo & tin whistle by expert tutors: Saturday night concert of Irish music & dance.
- Warrenpoint Blues on the Bay Festival (May) – Weekend event attracts quality Blues & Jazz performances for workshops and performances.

- The Mourne International Walking Festival (June) – A wide variety of walks ranging from excellent road and track walks to guided mountain rambles and hikes.
- Oyster Pearl Regatta (June) – The regatta and its feeder races are an annual yacht racing series based out of Carlingford Marina and organised by Carlingford Sailing Club.
- Fiddler's Green Festival (July) – An established annual celebration of Irish music and culture with an international flavour, which takes place in the scenic village of Rostrevor.
- Warrenpoint International Maiden of the Mourne Festival (Mid July-Mid August) - A two-week summer festival with numerous events including concerts, outdoor entertainment and The Maiden of the Mourne Competition.
- Carlingford Lough Endurance Challenge (July) – Event involving mountain running, mountain biking and sometimes sea kayaking or swimming. (triathlon type event lasting 4-8 hours)
- Carlingford Triathlon (August) - Olympic distance triathlon. Premier league event hosting a 1500m swim, 40km bike and 10km run.
- Warrenpoint Regatta (August) - Organised by Warrenpoint Boat Club, racing for cruisers, lasers, and Flying 15s.
- Carlingford Oysters, Jazz & Blues Festival (August) - Proposed oyster festival for 2007 with leading jazz and blues musicians.
- Killowen Regatta (September) - Organised by Carlingford Lough Yacht Club.
- Kilbroney 2000 - Kilbroney Park hosts this day long event of motor memorabilia each September with a large selection of vintage cars on view.
- Harbour Sunday (September) - Family fun day based at Carlingford Harbour and with water based fun events.
- Táin Walking Festival (October) - A weekend festival for walkers to explore the spectacular landscape of the Cooley Mountains.

### 4.3 Branding

There are a plethora of tourism brands in existence at the moment but the objective of developing Carlingford Lough as a destination for marine based tourism dictates that the area needs to have a strong identity. As such it may be advisable to commission a market research study to analyse visitor and local perceptions of the area.

Without wishing to prejudice the outcomes of such a study it would seem logical to take advantage of and build on existing awareness of the area in the marketplace. In an effort to maximise the awareness of Carlingford Lough and the Mourne Mountains in key target markets, principally Ireland and Britain, it may be prudent to brand the region as “Carlingford Lough and the Mournes”.

This would have a threefold benefit:

- 1) Exploit the existing awareness of both Carlingford Lough and the Mourne Mountains in key target markets
- 2) Maximise opportunities that will arise from the planned designation of the Mournes as a National Park
- 3) Create a feeling of inclusion for communities on both sides of the Lough

In short, a strong brand must be created promoting the entire product offering on Carlingford Lough in a cohesive manner to prospective visitors. There needs to be a

clear vision for the future development of the Lough and a joint-up approach to marketing.

#### **4.4 Visitor Information**

The provision of information on and the marketing/promotion of Carlingford Lough must be improved. While there is already considerable published information available, it is fragmented and difficult for visitors to conveniently access. A more integrated, co-ordinated and accessible information and marketing/promotional effort would therefore be beneficial. All stakeholders agreed that the already developed brand of 'Experience Carlingford Lough' should be built upon in marketing efforts for the Lough.

#### **4.5 Clustering**

The Carlingford Lough brand needs to be developed by all stakeholders around the Lough. Recent INTERREG funded projects have done much to bring people from both sides of the Lough together in a more formalised structure, particularly through event development. This 'cluster' approach needs to continue after the funding period to facilitate a more 'joined-up' approach to the marketing and promotional efforts for the Lough. For example the promotion of angling may require guaranteed fishing and the packaging of other products/services including angling guides, accommodation (with suitable facilities such as wet changing and bait storage), boat hire and possibly events. This should be accompanied by associated marketing and promotion.

#### **4.6 Tourist Ferry**

A long-standing proposal for a 'tourism' ferry between Greenore on the southern shore and Greencastle on the northern shore remains active. However, strong resistance from residents continues to halt the establishment of such a linkage. Residents in Greencastle have challenged the proposal on a number of grounds, namely;

The areas status as a special protection area for birds and seals, the unsuitability of the roads and the listed bridge from the village to the main road, the upsetting of cattle movement due to increased traffic congestion and the increased traffic disturbing the peace of a small rural village. A recent economic appraisal conducted by Campbell Conway on behalf of Dundalk Chamber of Commerce and funded by INTERREG IIIA, highlighted the economic feasibility of establishing the link. Much interest has also been shown from a well established private operator.

A ferry across the lough would form a circular touring route around Carlingford Lough and would contribute to the development of marine tourism in the area. It would also provide an important link from the main Belfast to Dublin motorway to the proposed Mourne National Park. Recently a private operator has received funding to operate a foot passenger ferry between Omeath and Warrenpoint.

#### **4.7 Cruise Ship Visits**

Carlingford Lough is by its nature not an ideal destination for large cruise ships. Larger cruise liners would have to anchor in Dundalk Bay up to eight miles from the entrance to the Lough, and it would be impractical to ferry passengers from this point into the Lough. However, the area has a sufficient mix of activities, attractions,

restaurants, bars and entertainment venues to easily cater for smaller cruise boats from Scandinavia and Scotland for example.

Both Greenore and Warrenpoint Harbour have expressed interest in facilitating the entry of small cruise liners into the Lough. Greenore has recently been acquired by Dublin Port Company. Dublin Port is Ireland's busiest freight and passenger port, and has become a favoured port for cruise lines in recent years. A growing trend in recent years has seen passengers embarking and disembarking at Dublin. In 2005 a total of 70 cruise liners visited Dublin Port, with a total of 60,000 high spending visitors, contributing €45m to the Irish economy. There is a significant opportunity for Greenore Port Authority to maximize the contacts through Dublin Port Company and attempt to attract small cruise liners to the area.

The cruise line market offers substantial opportunity but will take time and effort to secure, requiring a dedicated business development staff resource. Tourism interests in Belfast recognised the economic benefits off attracting cruise liners and have built its cruise line market from a base of just two cruises in 1999 to successfully attracting seventeen cruise ships in 2005/06, attracting 38,000 visitors and £10m revenue.

There has over the past few years been some visits from the Tall Ships, namely the 'Artemis' from the Netherlands organised by Dundalk Chamber of Commerce and which berthed at Warrenpoint Harbour. The Tall Ships were extremely well received and could now form part of the annual events calendar for the Lough.

#### **4.8 Visitor Moorings**

Several stakeholders from the consultation process suggested there was a need to provide mooring points around the Lough in order to develop a 'necklace' of mooring points for visiting boats. Moorings are usually comprised of a concrete (or other heavy material) anchor base, a rope and a floating buoy. They are the simplest kind of berthing facility and can be associated with a marina, managed by the relevant council, port authority or sailing club. They are usually located near to services, either at a marina itself or a nearby town or village.

A special set of mooring sites were recently installed as part of the National Network of Visitor Moorings project in the Republic of Ireland, a joint effort by Fáilte Ireland, the Department of the Marine and county councils. The project was developed as a network for safe travel and convenience of sailing along the southern and western coasts of Ireland. Their locations complement static marina facilities and adjacent moorings, providing for a secure haven at intervals along the coast. The moorings are large, coloured bright yellow and labeled 'VISITOR - 15 Tons'. A daily charge of £5 is levied at some locations. It must be noted that there has been serious issues around the ownership of these moorings in terms of accident liability and ongoing maintenance, which suggests a similar mooring development project in Carlingford Lough may not be a realistic objective.

#### **4.9 Marina Development**

Without new marina development the marine leisure sector cannot grow and reach its full potential. Ireland needs an immediate increase in the number of marina berths to cater for current boat numbers. There are currently 25 marinas in Ireland, with approximately 3,800 marina berths in total, a concentration of which are in Dublin

and Cork. The map below shows the location of marinas and visitor moorings in Ireland.

As an island nation the marine leisure sector is central to Ireland's overall visitor offering. Ireland has 7,500 kilometres of coastline, 700 kilometres of navigable rivers and lakes, and 900 harbours and piers. Nobody is more than 75 kilometres from the sea.

It is estimated that a total of 8,000 marina berths spread around the coast of Ireland are required. Ideally there should be one marina for every 20 nautical miles, but currently there are large stretches of the coast with no marina or harbour of refuge. Dublin alone needs 3,000 marina berths to cater for the current population if all boat owners kept their boats at the sea.



There are an estimated 25,000 boats in Ireland, based on the number of marina berths, number of swinging moorings, boats on the Shannon, sailing dinghies, and estimated number of fishing boats. The boat ratio in Ireland is approximately 1 boat per 172 people. This is well under the UK average of 1:106 and much lower than the European ratio of 1 boat per 46 people.

Considering the number of boats in Ireland and the shortage of marina berths it is clear that additional marina development is required for Carlingford Lough. At present there is one private marina on the outskirts of Carlingford and the general consensus from the stakeholder consultations indicates there is a clear need for additional berths. Representatives from both Carlingford Lough Yacht Club and Carlingford Sailing Club stated that there was a lack of berthing facilities for both resident and visiting sailors. In fact Carlingford Marina is the only marina on a 58 nautical mile stretch of coastline between Malahide Marina and Ardglass Marina.

The key finding to emerge from the report is the need for marina development on both the northern and southern shores of the Lough. There is substantial evidence showing that marina developments can act as a catalyst for significant growth in marine tourism and generally become the hub of on-shore and off-shore recreation and leisure activities. The lack of marina berths is seen as one of the main factors constraining growth of a sustainable marine tourism industry in the Carlingford Lough area.

Additional marina development would create a much needed 'necklace' of berthing points around the Lough and would help encourage movement of boats and visitors around the Lough. This would have the knock on affect of attracting increasing numbers of visitors and would keep visiting boats in the area longer.

A good marina should have:

- Excellent Transport Access
- Sound Pontoons and Breakwaters
- Good Shore Facilities
- A Safe Haven
- Easy Navigation

There are several options for marina development on Carlingford Lough currently being assessed by a number of interested parties. The main options are detailed below:

1) Marina Development at Carlingford Harbour

Carlingford harbour is an ideal location for potential marina development and would have the benefit of providing direct access to the village for visiting boats. The area inside the harbour is approximately 20 acres and is currently used for water sports by individuals, Carlingford Adventure Centre and Carlingford Sailing Club. The harbour is also used by local fishermen for mooring.

The harbour dries at low tide and would need to be dredged to allow boats to enter and exit the harbour at certain tide levels. Depending on the level of dredging, it would be possible to create a deeper pool to float visiting boats throughout the tide, although there may not be all-tide access. Dredging the harbour may be a project which the Loughs Agency would consider funding or part funding as part of a wider marine tourism development strategy. There are two piers either side of the harbour, but a breakwater would need to be built as part of any marina development plans to provide shelter.

Carlingford Sailing Club has recently built an impressive new purpose built sailing club beside Carlingford harbour. Facilities include a clubhouse bar, function room, sailing school and internet zone. The Club has no berthing or mooring facilities for club members or visiting boats and have made this a priority action. The Club believe there is a significant market for a marina in Carlingford Lough and have aspirations to build a 300-500 berth marina in Carlingford. The preferred location for the marina is inside the harbour, but there is an option to build a marina in front of the harbour, as the Club owns this land. Depending on the scale of any proposed marina development Club members estimate that the project could cost in the region of €15million to build, and would require 50% match funding in a public private partnership.

Any plans to develop a marina facility in Carlingford harbour will inevitably involve a public/private partnership and may involve providing private investors with an agreed amount of land reclaimed from the sea to develop mixed retail leisure facilities as part of the project.

#### 2) Further development of Carlingford Marina

Carlingford Marina is the only marina in Carlingford Lough at present. The marina has 280 fully serviced berths and facilities include a shower Block, Laundry, Fuel (Diesel available during open hours), water (available at pontoons), electricity at the majority of berths, boatyard with hoist facility, secure access control, Carlingford Sea School & Yacht Charter, restaurant and bar. At present the marina is operating almost to capacity and has a small number of berths available for visiting boats.

The main issue with the marina is the fact that it is on the outskirts of Carlingford and is somewhat isolated from the main village. The marina proprietors are keen to build a promenade which would link the marina with the village, but this would require public support and backing from Louth County Council.

It may also be prudent to assess the possibility of reclaiming land between Carlingford Marina and the harbour to develop a promenade, car parking facilities and a suitable retail/leisure mix that would enhance the overall visitor offering.

#### 3) Marina Development at Warrenpoint

Plans to build a marina in Warrenpoint have been discussed for a number of years. Warrenpoint Harbour Authority has recognised the potential for marina development and has established a clear vision for future development of a marina in the popular seaside town. The Harbour Authority is currently in discussion with Newry and Mourne Council about the possibility of developing a marina with approx 200 berths. There are 15 permanent berths at present during the summer season. There is already a breakwater on the front shore in Warrenpoint, although marina walls would need to be built and some dredging undertaken to provide suitable water depth for berths. The fact that Warrenpoint Port has an existing license for off-shore dumping would speed up the dredging process.

Any plans to develop a marina facility in Warrenpoint will inevitably require a public/private partnership and may involve providing private investors with an agreed amount of land reclaimed from the sea to develop mixed retail leisure facilities as part of the project.

#### 4) Pontoon development at Killowen

Lack of critical mass to support a marina development at Killowen determines that any plans to develop boat berths should be limited to building pontoons at Carlingford Lough Yacht Club. The club has built a clubhouse facility in Killowen, but have no berthing or mooring facilities for club members or visiting boats and have made this a priority action. The Club believe building a relatively small number of pontoons at Killowen would help create the 'necklace' of mooring points around the Lough and encourage the movement of boats throughout the area. A small amount of dredging would be required to build up to 15 pontoons along the shore at the Yacht Club. If the development of pontoons at Killowen is not achieved in the short-term the club would support the development of a marina in Warrenpoint.

#### 5) Marina Development at Greenore Port

Greenore Port occupies a strong strategic position for a potential marina development on the mouth of Carlingford Lough. At present the port is strictly commercial and does not cater for leisure crafts. Greenore Port has been recently acquired by Dublin Port Authority. The company has begun to realise the potential of the tourism market in recent years, particularly in Dublin Port. There are no current plans to develop a marina at Greenore Port, but future plans may include the re-location of the existing commercial port operation to another site in Greenore thus providing an opportunity to transform the current deep sea port to cater for small cruise liners and leisure crafts. This plan would obviously not involve any dredging as the existing port could easily cater for leisure boats.

#### Marina Development – Economic Impact Assessment

There are numerous examples of how marina developments can act as a catalyst for significant growth in marine tourism and generally become the hub for on-shore and off-shore recreation and leisure activities. The economic benefits of marinas are clear with visiting boats spending an average of €120-€150 per night, with an average three night stay. In addition to resident boats marina development would attract new business to the Lough through rallies of both sailing and power boat classes, where they had opportunities to berth in Carlingford, Warrenpoint and Newry at the very least. This would generate substantial revenue for the local economy, considering a weekend event attracting 30 cruisers would typically spend in the region of €15,000.

A recent socio-economic study of three marinas undertaken by the Marine Institute evaluated the economic impact of marinas at Malahide, Dun Laoghaire and Kilmore Quay. In Malahide 34% of businesses surveyed attributed growth due to the marina. In Dun Laoghaire 33% of business surveyed attributed growth due the marina and in Kilmore Quay 50% of business surveyed attributed growth due to the development of the marina. Dun Laoghaire Marina welcomes more than 1,200 visitors per year, generating €650,000 for the local tourism industry.

The total economic impact of the 3 marinas surveyed is detailed below:

- Berth Holder Direct Spend: €8,138,136
- Visitor Spend : €1,230,824
- Secondary Benefits: €3,255,254
- Boat Sales approx. €22,000,000
- Total Number of Jobs Supported 237

The potential market for attracting visiting boats to proposed marinas in Carlingford Lough is substantial when the current number of marina berths in the Irish Sea is analysed. Carlingford Lough is within sailing distance of all 46 marinas along the coastline of the Irish Sea and considering there is a total of 8,176 available marina berths along the coast of the Irish Sea the potential to attract Irish and British visitors, the two key markets for the area, is significant. The marina berths are broken down as follows, Scotland – 642, Isle of Man – 70, England – 2135, Wales – 1476, Northern Ireland – 1600 and the republic of Ireland - 2253. (See Appendix 1)

In addition, there is substantial boat traffic through the Caledonian Canal from Scandinavia passing down the Irish Sea, which represents a great opportunity to devise visionary integrated projects such as marina development coupled with themed touring routes which would substantially increase the amount of visitors to the area.

## **Chapter 5 Market Overview**

### **5.1 Introduction**

Market intelligence is the indispensable basis for effective marketing and should be at the heart of any tourism organizations efforts to identify market trends and needs. Today's increasingly competitive tourism marketplace with many emerging competitors has made it essential to have very clear strategies concerning which markets to target. There is not an infinite amount of funding for promotional activity so market segmentation and prioritising has become critical.

Over the past three decades, the tourism sector has grown significantly both in terms of tourist arrivals and revenue. The growth is reflective of the importance of the tourism sector within the global economy and also of changing social and economic profiles of the world's population; namely increased spending power per capita, greater leisure time, better informed and traveled (and thus more discerning) public, and major demographic changes in the developed and to a certain extent developing world leading to major changes in travel and leisure demand characteristics.

### **5.2 Marine Tourism – Global Analysis**

A study conducted in 2004 valued the global marine tourism industry at €168bn, approximately 11% of the total tourism revenues. In the same period, the world cruise liner market was valued at €12bn and is projected to grow 4.4% annually to €14.8bn by 2009. The report indicated that the global market for angling, coastal and inland leisure boating and watersports is forecast to enjoy continuing long term growth to €198bn by 2009.

### **5.3 International Tourism Analysis**

World tourism has grown rapidly over the past 30 years and is now considered to be the world's largest industry and service sector, contributing over 10% of world gross domestic product and employing more than 10% of the global workforce. According to the World Tourism Organisation the global tourism industry was worth €548billion in 2005 and is expected to more than double by 2020.

The global tourism industry again proved to be resilient to crisis and disaster in 2005, despite threats from terrorism, natural disasters, health scares, oil price rises, exchange rate fluctuations, economic and political uncertainties. Yet, international tourist arrivals worldwide beat all expectations exceeding 800 million and achieving an all time record. The estimated increase represents a staggering 42 million additional arrivals: more than 17 million of which were to Europe. The 2005 results represent a worldwide increase of 5.5%, and consolidate the bumper growth achieved in 2004 (+10%). Although world tourism growth was more moderate in 2005, it was still almost 1.5% above the long term average annual growth rate of 4.1%.

In 2005, the majority of international tourist arrivals related to trips for the purpose of leisure, recreation and holidays (50%) reaching a total of 402 million. Business travel accounted for some 16% of the total (125 million) and another 26% consisted of

travel for other motives, such as visiting friends and relatives (VFR), religious purposes/pilgrimages, health treatment, etc (212 million).

Just under half of all international tourists arrived over land by road (43%) or rail (5%) to their destination in 2005. Air transport represented 45% of arrivals and transport over water accounted for 7%. For the past two years the trend has been for air transport to grow at a faster pace than transport over land or water.

According to the latest issue of the *UNWTO World Tourism Barometer*:

- In the first eight months of 2006 international tourist arrivals totaled 578 million worldwide (+4.5%), up from 553 million in the same period of 2005.
- Growth is expected to continue in 2007 at a pace of around 4% worldwide.

The expected 4% growth for 2007, though slightly slower than in previous years, is much in line with the UNWTO long-term forecast growth rate of 4.1% a year through to 2020.

UNWTO considers that there is an important market potential for rural tourism. With an expected growth rate of around 6% rural tourism is developing faster than the overall growth rate for international tourism arrivals.

#### 5.4 National Tourism Analysis

Tourism to the island of Ireland has experienced significant growth over the past decade. Visitor numbers have almost doubled despite a very challenging environment which included declining global airline travel after the September 11<sup>th</sup> terrorist attacks, SARS, 'Foot and Mouth' disease, the conflict in the Middle East and a slowdown in the global economy. According to Tourism Ireland, the number of overseas visitors to Ireland has continued to increase in 2005, **up 5% to 8.1 million**, generating revenue of **€3,975m (+8%)** with a strong performance from Mainland Europe, a modest recovery from Britain and a late recovery from North America.

To meet the aims of both jurisdictions, ambitious targets of 5.2% increase in visitor numbers were set for 2006. Current market intelligence suggests a **growth of 8.5%** will be achieved, as shown in the table below:

Visitors	2005 Actual		2006 Target		2006 Forecast		2007 Target	
	000's	Change %	000's	Change %	000's	Change %	000's	Change %
Great Britain	4,810	+1%	4,954	+3%	5,014	+4%	5,164	+3%
Mainland Europe	1,991	+21%	2,158	+8%	2,338	+17%	2,595	+11%
North America	993	+0%	1,077	+9%	1,101	+11%	1,156	+5%
New and Developing Markets	319	-7%	351	+10%	347	+9%	375	+8%
<b>All Island</b>	<b>8,114</b>	<b>+4.8%</b>	<b>8,541</b>	<b>+5.2%</b>	<b>8,801</b>	<b>+8.5%</b>	<b>9,291</b>	<b>+5.6%</b>

The challenge now is to build on this growth and achieve revenue and holidaymaker growth in line with visitor growth. In addition, it will be important to deliver incremental growth for Northern Ireland beyond that which is targeted for the island of Ireland as a whole, while ensuring the distribution of visitors to all Regions of the island of Ireland.

In terms of revenue, the forecast is for growth of 6.4%. This does, however, represent a reduced spend per visitor. The source of this growth will be slightly different than originally envisaged i.e. there will be stronger growth from Great Britain, North America and Mainland Europe with strong growth from the non-traditional European markets where there is a heavier visiting friends and relatives component. The growth from New and Developing Markets will be marginally behind target.

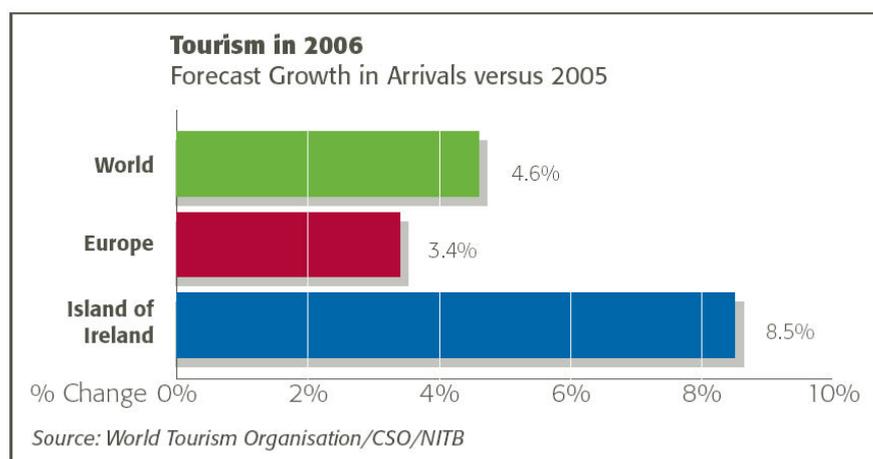
The table below shows that visitor revenue is forecast to increase by 6.4% in 2006, slightly under the target of 6.9%.

Revenue	2005 Actual €		2006 Target €		2006 Forecast €		2007 Target €	
Euros (€)	Million	Change %	Million	Change %	Million	Change %	Million	Change %
Republic of Ireland	3,487	+7.8%	3,717	+6.6%	3,718	+6.6%	3,988	+7.3%
Northern Ireland	488	+13.1%	531	+8.9%	512	+5.0%	558	+9.0%
<b>All Island</b>	<b>3,975</b>	<b>+8.4%</b>	<b>4,249</b>	<b>+6.9%</b>	<b>4,230</b>	<b>+6.4%</b>	<b>4,546</b>	<b>+7.5%</b>

Revenue	2005 Actual £		2006 Target £		2006 Forecast £		2007 Target £	
Sterling (£)	Million	Change %	Million	Change %	Million	Change %	Million	Change %
Republic of Ireland	2,336	+7.8%	2,490	+6.6%	2,491	+6.6%	2,672	+7.3%
Northern Ireland	327	+13.1%	356	+8.9%	343	+5.0%	374	+9.0%
<b>All Island</b>	<b>2,663</b>	<b>+8.4%</b>	<b>2,846</b>	<b>+6.9%</b>	<b>2,834</b>	<b>+6.4%</b>	<b>3,046</b>	<b>+7.5%</b>

'Promotable visitors', too, will show growth over the targets set – this includes holidaymakers, those studying English as a foreign language and conference and incentive visitors. The increase in promotable visitors for 2006 is forecasted to be 10%, which is ahead of expected growth levels and a reversal of recent trends. Tourism Ireland is forecasting above-target growth from Great Britain, North America and Mainland Europe – helped by strong access increases.

The strength of visitor growth to the island of Ireland in 2006 can be viewed as a significant achievement when compared to the more modest global growth rates of 4.6% anticipated by the World Tourism Organisation, and even more moderate growth of 3.4% to Europe in 2006, as shown in the graph below:



## 5.5 Northern Ireland Tourism Analysis

The Northern Ireland tourist industry earned £503m in 2005, of which £357m came from staying visitors in Northern Ireland and £146m from domestic spending. Large increases were evident for bednights (+12%) and consequently spend (+14%) in 2005, despite an overall decline in visitor numbers (-1%).

<b>Summary Information of Visitor Tourism</b>		
	<b>(million)</b>	<b>% change with 2004</b>
TRIPS	1.972	-1
NIGHTS	9.561	+12
REVENUE	£357	+14 (+12 in real terms)

\*Source – Northern Ireland Tourist Board

With the exception of the GB market, which suffered a decline largely due to greater choice of short break destinations and low cost access, as well as a reduction in the number of sea routes from GB to Northern Ireland, visitor numbers from the other main markets increased. Republic of Ireland (+8%); Europe (+32%); North America (+19%) and Australia/New Zealand (+12%).

Holiday/leisure/recreation visitors accounted for 18% (345,000) of all visitors. Increases in direct access from Europe and North America to Northern Ireland have undoubtedly contributed to the strong growth in these markets, as shown in the table below:

<b>Northern Ireland's Key Markets</b>		
	<b>Trips (000s)</b>	<b>% change with 2004</b>
Great Britain	1,308	-7
Republic of Ireland	271	+8
Europe	176	+32
North America	145	+19
Australia/New Zealand	47	+12
Other Overseas	24	-11

The table below shows how reliant the Northern Ireland tourist industry relies on the British and Republic of Ireland markets, which account for 80% of out of state visitors.

<b>What percentage of the market did each country take?†</b>						
<b>Trips (000s)</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>
	1,672	1,676	1,741	1,896	1,985	1,972
England	40	43	44	50	50	46
Scotland	16	19	21	21	20	19
Wales	1	1	1	2	1	1
(Great Britain)	(57)	(63)	(66)	(73)	(71)	(66)
Republic of Ireland	23	22	19	12	13	14
North America	9	6	6	5	6	7
Europe	8	6	6	7	7	9
Australia/New Zealand	3	2	2	2	2	2
Other Overseas	1	1	1	1	1	1

The domestic market continues to underpin the Northern Ireland tourism industry with 1,390,000 trips (41%), slightly under the 1,972,000 out of state visitor trips, underlining the importance of the home market.

Historically, the Northern Ireland tourist industry has struggled to attract significant numbers of out of state visitors and has relied heavily on domestic visitors, mainly due to the troubles. While there has been a major increase in the number of overseas visitors visiting Northern Ireland, 41% of all visitors came from within Northern Ireland, resulting in the domestic market accounting for £146m (29%) of total tourist revenue. The table below shows that 1,390,000 trips were made from the domestic market in 2005.

	<b>Trips (000s)</b>	<b>Nights (000s)</b>	<b>Revenue £m</b>
Total domestic trips	1,390	3,500	146
Domestic holiday trips	950	2,600	99

### **5.5.1 Profile of Visitors to Armagh & Down Region**

The northern shore of Carlingford Lough lies within Newry and Mourne Council area, which is a partner of the Armagh Down Regional Tourism Partnership (RTP). According to statistics issued by Armagh Down RTP in 2005 over two-thirds of those visiting the Armagh and Down area were from Northern Ireland, while one in ten came from the Republic of Ireland (10%). A further 29% of visitors originated from Great Britain, while 20% were from international countries of origin.

During 2005, slightly over half of those visiting Armagh and Down were on a 'pure' holiday visit, while 22% were visiting friends or relatives. A further 20% were on a day trip from home, with a small proportion (3%) on a business trip. Equal proportions were on holiday with their partner or family (20% each), while 13% were with a friend(s).

The majority of visitors to the area who were on holiday were on a short break (60%). Slightly less than a quarter described their holiday as their main holiday of the year (23%), while 16% stated that they were on a secondary or additional holiday. People visiting the area were more likely to spend the night at the home of a friend or relative than in any other form of accommodation. The second most likely was a night in a touring caravan with hotels the third most popular form of accommodation.

## **5.6 Republic of Ireland Tourism Analysis**

In 2005, out-of-state tourist expenditure, including spending by visitors from Northern Ireland, amounted to €3.7 billion. With a further expenditure of €0.6 billion by overseas visitors on fares to Irish carriers, total foreign exchange earnings were €4.3 billion. Domestic tourism expenditure amounted to €1.16 billion making tourism in the Republic of Ireland a €5.4 billion industry in 2005.

Overseas visitors to the Republic of Ireland increased by 6% in 2005 to 6.8million. Tourist numbers from Britain increased by 3%, Mainland Europe recorded substantial

growth of 20%, however, the volume of North American tourists fell by 2% and remains well below the record level of 958,000 achieved in 2000. Visitors from the other long haul markets fell by 11%, following a strong increase in 2004. Poland has been included in overseas markets for the first time and according to estimates is now the sixth largest market in Mainland Europe with 125,000 visitors in 2005.

The estimated total number of people employed in the Irish tourism and hospitality industry in 2005 was 245,959, little changed on the numbers employed in 2004.

The domestic market continues to underpin the Irish tourism industry with 7.2m trips (49%), slightly under the 7.3m out of state visitor trips. This underlines the importance of the domestic market to the Irish tourism industry, particularly in non-urban areas such as Carlingford Lough. In terms of out of state visitors Britain remains the key market for the Republic of Ireland providing 36% of all out of state visitors.

The table below shows a breakdown of visitors to the Republic of Ireland in 2005:

Where did Ireland's tourists come from?					
Numbers (000s)	2001	2002	2003	2004	2005
Britain	3,340	3,452	3,553	3,526	3,640
Mainland Europe	1,336	1,378	1,484	1,582	1,903
Germany	285	288	302	298	402
France	280	298	321	297	310
Italy	157	157	176	186	190
Netherlands	182	162	146	151	157
Belgium	75	96	85	92	84
Sweden/Denmark	81	67	78	72	98
Spain	100	113	133	157	171
Poland	11	13	17	39	125
Switzerland	38	42	51	65	54
Other Europe	127	141	174	224	312
North America	903	844	892	956	937
USA	829	759	809	867	854
Canada	74	85	84	89	83
Rest of World	261	245	249	319	284
Australia	111	96	92	125	111
New Zealand	26	19	20	24	26
Japan	22	22	22	31	19
Other Asia	58	64	62	79	71
Africa	32	29	32	42	39
Other Overseas	12	16	21	19	19
<b>Total Overseas</b>	<b>5,840</b>	<b>5,919</b>	<b>6,178</b>	<b>6,384</b>	<b>6,763</b>
Northern Ireland	513	557	586	569 <sup>1</sup>	570
Out-of-State	6,353	6,476	6,764	6,953	7,333
Domestic Trips	6,307	6,452	6,657	7,001	7,173

Regional economic growth is currently one of the most pressing issues in the South. The regionalism issue is now beyond an 'East v West' concern and incorporates a clear 'Urban v Rural' dimension. Consumer patterns have influenced this shift as evidenced by the increase in the volume of Internet bookings made by visitors for short breaks to key cities and towns with direct access.

The table below shows the dispersal of visitors to regions across the Republic of Ireland. The table shows that the Midlands East area attracted approximately 10% of total visitors.

Where did tourists go and how much did they spend in 2005?				
Regional Numbers (000s) and Revenue (€m)				
Numbers (000s) Revenue (€m)	Overseas Tourists	N. Ireland	Domestic	Total
Dublin	3,937 1,281.8	178 55.7	1,054 168.1	5,169 1,505.6
Midlands/East	843 295.0	35 8.4	900 112.7	1,778 416.1
South-East	943 252.3	9 2.8	1,099 180.6	2,051 435.7
South-West	1,717 733.3	46 19.0	1,525 275.6	3,288 1,027.9
Shannon	1,002 293.3	31 11.5	713 102.0	1,746 406.8
West	1,235 441.1	60 27.1	1,232 230.1	2,527 698.3
North-West	489 190.1	211 54.2	650 95.4	1,350 339.7
<b>Total Revenue</b>	<b>3,486.8</b>	<b>178.8</b>	<b>1,164.5</b>	<b>4,830.2</b>

### 5.6.1 Profile of Visitors to Midlands East Region

The southern shore of Carlingford Lough lies within Louth County Council area, which is a partner in the Midlands East Regional Tourism Organisation (RTO). The Midland East area is promoted as a single region covering the counties of Kildare, Laois, Longford, Louth, Meath, North Offaly, Westmeath and Wicklow.

The tables below show a breakdown of visitors and revenue from the main tourist markets to the Midlands East region in 2005:

#### Tourism to Midlands East

Number of Tourist Visits	(000s)					Tourism Revenue	(€m)				
	2001	2002	2003	2004	2005		2001	2002	2003	2004	2005
Britain	421	437	436	441	474	111.6	161.8	144.2	118.6	140.1	
Mainland Europe	164	166	176	194	216	69.5	73.5	77.4	64.9	99.8	
North America	138	112	119	107	116	63.3	35.8	41.9	52.7	37.5	
Other Areas	45	44	44	35	37	54.5	37.8	15.4	12.2	17.6	
<b>Total Overseas Tourists</b>	<b>768</b>	<b>759</b>	<b>775</b>	<b>777</b>	<b>843</b>	<b>298.9</b>	<b>308.9</b>	<b>278.9</b>	<b>248.4</b>	<b>295.0</b>	
Domestic Tourism	691	755	802	873	900	66.1	74.9	90.6	90.3	112.7	
Northern Ireland	36	37	42	30	35	6.7	9.5	9.2	7.1	8.4	
<b>Total Tourists</b>	<b>1,495</b>	<b>1,551</b>	<b>1,619</b>	<b>1,680</b>	<b>1,778</b>	<b>371.7</b>	<b>393.3</b>	<b>378.7</b>	<b>345.8</b>	<b>416.1</b>	

**Total Overseas Tourists 2001–2005** (000s)

**Total Tourism Revenue 2001–2005** (€m)

\*Source Fáilte Ireland

The table below shows a breakdown of visitors from the main markets to each county in the Midlands East region. County Louth attracted a total of 92,000 overseas visitors in 2005, 59% of which were from Britain.

Overseas Tourists to Counties (000s)					
	Total	Britain	M. Europe	N. America	Other Areas
Kildare	185	114	40	22	9
Laois	41	28	5	5	3
Longford	33	23	5	4	1
Louth	92	54	22	12	4
Meath	117	66	29	18	4
Wicklow	267	124	88	42	13
Offaly East	48	31	10	5	2
Westmeath	117	58	35	19	5

As with the tourism industry on the northern shore of Carlingford Lough, domestic tourism is equally important on the southern shore. A total of 900,000 domestic visitor trips were made to the Midlands East area in 2005 representing 51% of total visitors and 27% of total tourism revenue, as shown in the table below:

### Domestic Tourism to Midlands East

Trips and Revenue					
	2001	2002	2003	2004	2005
Domestic Trips to Midlands East (000s)	691	755	802	873	900
Proportion of all domestic trips (%)	11	12	12	12	13
Domestic Revenue (€m)	66.1	74.9	90.6	90.3	112.7

Source: CSO Household Travel Surveys 2001-2005.

## 5.7 Key Target Markets

The home market continues to underpin tourism beyond Dublin and other major urban areas and is likely to increase further in 2006. However, there are significant competitive pressures on this market - low cost airlines have increased the competition for Irish holidaymakers. In addition, the marked increase in the level of holiday home ownership, both in Ireland and abroad, has drawn Irish holidaymakers away from paid accommodation.

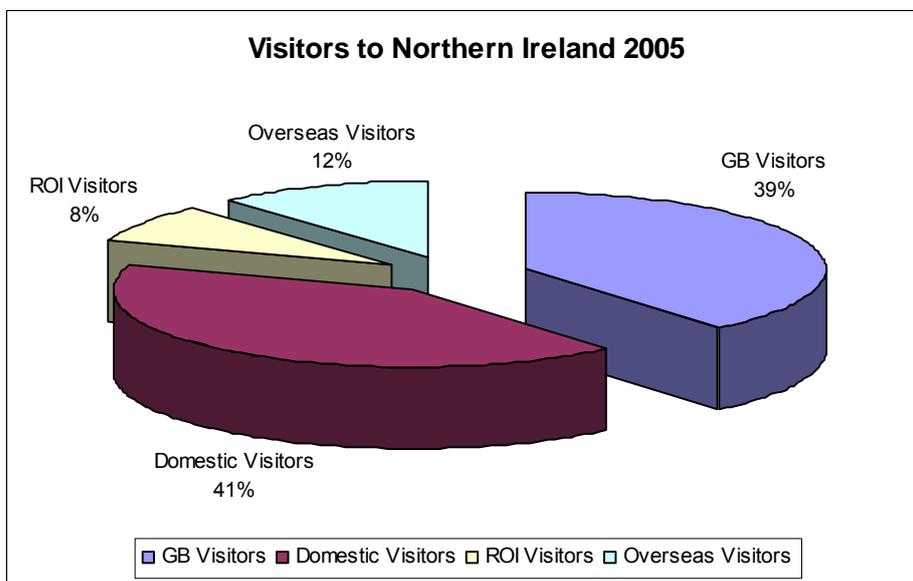
In the Republic of Ireland the domestic market increased to 7.2million trips (49%) and €1,165m (21%) of total visitor revenue in 2005. In the same period, the Northern Ireland domestic market also increased to 1.4million trips (41%) and £146m (29%) of total visitor revenue.

There is little doubt that the domestic market should be the primary focus of any future marketing campaigns promoting Carlingford Lough, with the British market being an important secondary target market. Considering that 49% of all visitors to Northern Ireland and 53% of all visitors to the Republic of Ireland are from Ireland (all-island), it is obvious that the Irish marketplace provides the best opportunity to

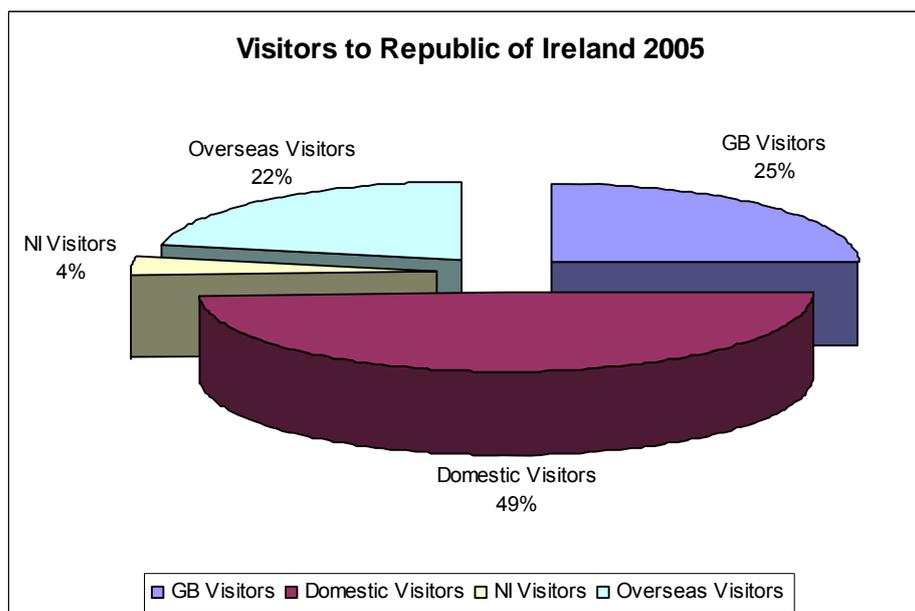
attract prospective visitors to Carlingford Lough. Economies of scale would also dictate the home market is the least expensive to target with a marketing campaign. In addition, the consumer is changing, the trend towards short, urban-based breaks continues, drawing the overseas leisure visitors away from rural areas.

Day-trippers to coastal areas are probably the largest untapped source of revenue for the marine tourism industry. A substantial increase in revenue could be expected if these tourists were to increase their length of stay at tourist locations, through events for example. Providing suitable facilities in coastal areas may make coastal seashores more attractive for longer stays, therefore increasing the average visitor expenditure.

The table below clearly shows how important the home market is, providing 49% of all visitors to Northern Ireland:



Similarly, the following table shows the importance of the home market in the Republic of Ireland, providing 53% of all visitors:



The previous tables also highlight how important the British market is to Irish tourism. In 2005 Britain provided 39% of all visitors to Northern Ireland and 50% of total visitor revenue. The British market is equally critical to the tourism industry in the Republic of Ireland providing 25% of all visitors and 23% of total visitor revenue in 2005.

Britain has consistently been the largest market to Ireland and contributed €1.6/£1.1 billion in revenue to the island of Ireland in 2005. The British take over 59 million outbound trips worldwide every year. Ireland is the third most popular destination for the British and over 5 million visitors are expected in 2006. In 2007, visitors are targeted to grow by an additional 150,000 visitors. Tourism Ireland plan to spend €11.5m on promoting Ireland in the British marketplace during 2007. This is a significant marketing spend and it would be prudent to 'piggyback' this marketing effort by partnering with Tourism Ireland to promote Carlingford Lough.

### 5.8 Tourism Ireland 2007 Marketing Plan

Tourism Ireland expects to receive a core budget of €67/£46 million in 2007 to carry out overseas marketing and operational activity on the island of Ireland and overseas, the highest ever level of funding for frontline marketing from the Governments both North and South. Tourism Ireland will also receive additional funding from Fáilte Ireland and the Northern Ireland Tourist Board for overseas marketing services provided on an agency basis.

Factors such as price sensitivity, the continuance of the later booking pattern, changing consumer demands and the increased demand for authentic holiday experiences will pose challenges for the industry on the island.

Ambitious growth targets have been set for 2007 to generate €4.5/£3 billion in tourism revenue (+7.5%) driven by 9.3 million visitors (+5.6%) and 9.3 million promotable visitors (+6.9%). GB and Mainland Europe are expected to be the largest contributors to growth.

## Chapter 6 Vision / Development Directions

### 6.1 Overview

The previous chapters identified a number of key findings about the current marine-tourism based offering in Carlingford Lough and opportunities to further develop this potential. These findings will help to shape an overall Development Plan which has the capacity to make best use of the area's current assets and provide a future roadmap for infrastructural product and brand development.

Sourcing funding will be a critical element of realising the potential of the area and will involve public/private sector partnerships. The next round of European funding administered through the INTERREG Programme 2007-2013 will provide a huge opportunity for coastal based areas such as Carlingford Lough. However this funding programme is expected to be extremely competitive which reinforces the need for key stakeholders in the area to assess the recommendations in this plan and to take steps to best position Carlingford Lough to maximise this funding opportunity.

### 6.2 Development Directions

The key development directions to be considered in any plan to develop the marine tourism potential of Carlingford Lough are outlined below:

- **Market-led Development:** Development of the resource for tourism, recreation and leisure purposes must be market-led (i.e. responding to the market requirements and needs of the user) rather than supply-driven (i.e. driven solely by the existence of the resource). Development plans must be based on a thorough and realistic assessment of what the potential market for the resource is, and how much of this market it is likely to attract.

The absence of up-to-date information concerning the scope and performance of the marine tourism industry is a constraint to those wishing to invest in facilities or services in this area at present. This situation should be examined, the scope of essential information identified and measures put in place to monitor the industry and publish regular data and analysis relating to its performance.

Markets – local resident, Northern Ireland visitor, Republic of Ireland visitor, British visitor, other overseas visitors – should also be prioritised according to their relative potential (in the short-term, this most likely means a focus on the local resident, domestic and British visitor markets).

- **Visitor Profiling:** A Market Research Survey should be commissioned focussing on the following key areas:
  - Profile of visitor to Carlingford Lough
  - Nature and reason of visit to the area
  - Length of stay / Spend in the area
  - On shore facilities used
  - On shore and off-shore activities engaged in
  - Usage of marinas during trip
  - Satisfaction with facilities/activities/services used
- **INTERREG Funding 2007-2013:** The INTERREG IVA 2007-2013 funding programme includes Northern Ireland, border counties of the Republic of Ireland and the west coast of Scotland. It has been designed to encourage projects that

can demonstrate interregional, cross border and trans-national co-operation. Regions within a maximum of 150km between border areas will be permitted to partner with each other, which will allow partnership working with Western Scotland.

Carlingford Lough is in a prime position to take advantage of these funding opportunities due to its geographical location, straddling both the Northern and Southern shorelines and therefore two states namely the UK and Republic of Ireland. Moreover, its close proximity to key areas in Scotland such as Dumfries and Galloway or Ayrshire and Arran will provide partnership opportunities for tri-national co-operation. There is substantial boat traffic through the Caledonian Canal from Scandinavia passing down the Irish Sea, which represents a great opportunity to devise visionary integrated projects such as marina development coupled with themed touring routes which would substantially increase the amount of visitors to the area.

- **Brand Development:** A strong brand must be created promoting the entire product offering on Carlingford Lough in a cohesive manner to prospective visitors. There needs to be a clear vision for the future development of the Lough and a joint-up approach to marketing.

As such it may be advisable to commission a market research study to analyse visitor and local perceptions of the area. Without wishing to prejudice the outcomes of such a study it would seem logical to take advantage of and build on the awareness of the area in the marketplace. In an effort to maximise the awareness of Carlingford Lough and the Mourne Mountains in key target markets such as Ireland and Britain it may be prudent to brand the region as “*Carlingford Lough and the Mournes*”.

- **Clusters and Critical Mass:** It has been recognised that the clustering of activity can yield essential synergies and economies of scale. Such opportunities are present amongst the existing accommodation base, pubs, restaurants, leisure activities, activity centres etc.. Packaging of these offerings will enhance its attractiveness for potential visitors to the area.
- **Package / Activity Holidays:** The tourism product offering in the Carlingford Lough area is extremely fragmented and lacks a ‘packaged’ approach. The increasing importance of the internet in travel arrangements and bookings has led to a decrease in coach tour trade and increase in FIT visitors (Free Independent Traveller). As such it is imperative that the local tourism industry form suitable ‘clusters’ to provide packaged product offerings to prospective visitors. These packaged offerings may include, for example:
  - Rod hire, boat trip and lunch (e.g. for day trip angling visitors)
  - Sailing lessons, accommodation and evening meal (e.g. for overnight visitors)
  - Guided tours, events and accommodation (e.g. for overnight visitors)

Packaged product offerings must be market-led, price sensitive and well promoted to succeed. Such initiatives will help to increase the number of visitors to the area and will raise the profile of Carlingford Lough as an excellent destination for leisure/activity outings and short breaks.

- **Business Development Focus:** The Carlingford Lough area must be more actively promoted to organised groups and independent touring companies.

Encourage relationships between pleasure boat trip providers, tour operators and accommodation providers. A greater effort must be made to 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 (e.g. the medieval village of Carlingford, shopping in Newry, dining in Warrenpoint etc..)

- **Gaps in infrastructure and product development that hinder the market for the resource should be addressed:** There are many examples of product development needs, such as identifying ways to make the wider tourism product more “angler-friendly” (e.g. provision of hire facilities and incentives to encourage B&Bs to provide facilities for anglers) should also be explored.
- **Marina Development:** Findings from the consultation process with various stakeholders indicated that marina development is an essential development consideration for the future development of marine tourism in Carlingford Lough. However investment in a breakwater/marina walls and dredging is required to facilitate the construction of any potential marina developments in both Carlingford and Warrenpoint. The fact that the best potential marina development sites are in state ownership dictates that any plans must involve a public/private partnership. Several private investors have already expressed an interest in progressing marina development on both sides of the Lough, but an element of European/State funding would act as a catalyst to progress development.

In any case, investors will need to fully consider the possible costs and benefits involved in marina development. The justification in spending public or private funds on marina development therefore needs to be very clear, and there are a number of questions to consider:

- What size is the market for the marina and proposed services?
- What will be the development cost? What is the scale of development proposed? Does it require major infrastructural improvements (e.g. breakwaters, dredging)? Are there substantial planning costs involved (e.g. feasibility studies, environmental impact assessments, planning and foreshore licence)? Will the development compliment other suitable infrastructures and activities/services that are already available (water-based or otherwise)?
- What are the developer's likely direct, indirect and induced effects on the economy? Does it have the right product/location to attract the right markets? Is it filling a development “gap” in its area? Will it compete with/take business from other similar developments in the area or will it generate new business?
- What impact will the development have on other activities in the area (e.g. port activity/angling)? Will this impact be positive or negative?

A formal economic appraisal or cost-benefit analysis is therefore needed to fully appreciate the costs and benefits of marina development and if justified, then there should be a strong case for public investment. This action should constitute the first step in the marina development plan and it is vital that the major

interested parties/main players present the best possible case for why such investment should take place.

It should be noted that within the 'Greater Vision Plan for Newry', the development of a marina at Warrenpoint as a partnership between the public and private sectors, is one of the key development priorities in leisure and tourism.

Even relatively small-scale developments will arouse State interest if the likely benefits are worth it. The marina in Kilmore Quay for example, received approximately €420,000 in funding under the 1994-99 Operational Programme for Tourism but research carried out by the Marine Institute suggests that the marina generates spending of about €550,000 per annum for the local area.

- **Coastal Moorings Study:** Several stakeholders suggested that a visitor moorings study should be conducted to identify suitable sites for visitor moorings to enable more boats to visit the Carlingford Lough area. Additional mooring points around the Lough would help to create a 'necklace' of mooring points for boats to move around the Lough from. The perceived benefits of additional moorings are; increased visitors visiting the area; achieve a coordinated approach to sustainable tourism in the area; spread the benefits of the visits attracted by the Lough to a wider geographical area; encourage movement around the Lough and develop an integrated tourism offering.

Consideration points:

- To undertake market research to establish the level of demand (both existing and potential) for additional coastal visitor moorings within Carlingford Lough;
- To review coastal visitor mooring provision within other regions and identify best practice most applicable to Carlingford Lough;
- To identify optimum locations for additional coastal visitor moorings within the area;
- To identify potential funding sources for the implementation of a coastal visitor moorings programme within the Carlingford Lough area;
- Who will manage and pay for insuring and maintaining the moorings?

Furthermore, it is recommended that, after a period of two years, research is undertaken into the economic benefit, direct or indirect, accruing from the provision of the moorings

- **Scope for Public/Private Partnerships (PPPs):** There is strong Government interest in using PPPs in Ireland, and in PPPs' potential for funding development projects. In many cases PPPs have developed between Local Authorities and privately owned ports.

In Carrickfergus, strategic planning by the Town Council catalysed regeneration of the harbour area. The PPP-Maritime Area Partnership, responsible for implementing the strategy succeeded in attracting over £25m sterling investment in development of mixed-used infrastructure, a range of leisure and amenity facilities and the creation of 335 jobs in the area.

- **Role of Local Authority:** Because such projects are likely to involve the use of public assets, the role of the local authority is therefore central to the development of the marine tourism offering in Carlingford Lough. A key finding of this report

identifies the importance of adopting a partnership approach to development in which the local authority, in partnership with community and private interests, works to secure the future of the marine tourism offering and to maximise the area's current assets.

It is often the case whereby local yachting clubs or private developers will initiate projects such as the proposals for small to large marinas at Rosses Point, Skerries and Greystones for example. The degree to which local Government will become involved will depend upon the nature of the project. If the project is a small marina with the potential of visitor berths it is quite possible that local government will help in the project funding. However, if the project has a more significant public benefit, local government may play a greater role (e.g. Waterford Marina). Alternatively if the project is commercially focused e.g., a private marina and an apartment development, the government tends not to get involved.

- **Loughs Agency Advantage:** The local tourism industry and key influencers should recognise the considerable advantage the area enjoys through having the Loughs Agency based in the area. As a cross border organisation with a remit to develop recreational and leisure based tourism in Carlingford Lough and Lough Foyle, the Lough's Agency will be a key partner in efforts to attract funding for marine tourism based projects. There is also an opportunity to encourage the Loughs Agency to establish an interpretative centre in the area for educational visits and bird watching, pollution etc.. similar to the River Watch Centre in Derry, which has welcomed over 28,000 visitors to centre in the past three years.
- **Fáilte Ireland/Tourism Ireland – Influence needed:** A lobbying approach should be adapted to strengthen relationships with both Fáilte Ireland and Tourism Ireland to develop initiatives which will encourage the regional dispersal of visitors. A key objective identified in the East Coast and Midland's Regional Tourism Partnership marketing Strategy for 2006 is to work with Fáilte Ireland and Tourism Ireland on the issue of regional dispersal of tourists. This is a critical issue which needs addressed.

Considering that 81% of all visitors to Ireland arrive by air, the majority of which arrive via Dublin there is a huge challenge for Tourism Ireland and Fáilte Ireland to address the issue of regional dispersal. Fáilte Ireland provides significant funding to the regional tourism authorities who are responsible for the administration of the regional tourism marketing fund. Increased funding will be available for intra-regional marketing initiatives. In addition, the Festivals and Cultural Events Initiative and the Sports Tourism Development Fund aim to encourage the spatial spread of visitors throughout the country.

- **The Mourne National Park:** The dramatic mountains, farmland and coastline of the Mourne area forms one of the most captivating landscapes in Northern Ireland. The area is renowned as one of the most picturesque mountain districts in Ireland and was designated an Area of Outstanding Natural Beauty (AONB) by the Department of the Environment in 1986 in recognition of the quality of its landscape.

In 2002, the Environment and Heritage Service (EHS) commissioned a study on the potential benefits of establishing one or more National Parks in Northern Ireland. The study concluded that the Mourne area was best suited for designation as Northern Ireland's first National Park. Consequently, designation

of the Mournes has been recognised as one of five signature projects identified by the Northern Ireland Tourist Board (NITB) Strategic Framework for the Development of Tourism.

An independent Working Group has been established and is currently undergoing a period of Public Consultation due to complete in January 2007. Although current Northern Ireland legislation allows for the creation of National Parks, it does not provide an adequate basis for their management. Therefore, in order to designate a Mourne National Park, new primary legislation is required. Draft legislation is expected to be put to parliament in autumn 2007 with a view to establishing the 'Mourne National Park' by 2009/2010.

National Park designation represents a major opportunity for improving the visibility of the Mournes in Britain and overseas tourism markets. The 'National Park' brand has worldwide recognition and confers approval of a landscape as a must see attribute of a country. National Park status will provide a strong selling point to tour operators and will attract additional visitors to the area bringing new employment opportunities for its communities both directly and indirectly.

In April 2005 the Mourne Heritage Trust, in conjunction with the NITB, commissioned an economic appraisal to assess the current and potential economic impact of tourism in the Mournes. The report highlighted that tourism currently contributes some £72M to the local economies of Banbridge, Down and Newry and Mourne Council areas, approximately £38m of which is attributed to the Mourne AONB

If National Park designation is not achieved, by 2020, the potential economic impact across the three Council areas may increase by 94% to £140M, with the AONB accounting for £74M of this growth. With National Park designation, a growth of 207% to £221M could be realised across the three Council areas with the AONB's share of this amounting to £118M.

*\* Source: Report by Colin Buchanan and Partners Ltd, 'Tourism in Mourne - Current and Potential Economic Impact'*

It is evident that if the Mournes achieve National Park designation the benefit to the tourism industry within the AONB and further a field will be substantial. National Park designation will also help to attract national and international funding to strengthen the environment, culture and economy of the local area.

Carlingford Lough provides a natural link between the Mournes, Cooley Peninsula and Slieve Gullion. The Mournes and Ring of Gullion have already been designated as areas of Outstanding Natural Beauty (AONB) and considering the close proximity between each it may be prudent to consider seeking UNESCO Global Geopark status as a trans-national park. There is currently much debate ongoing in both Northern Ireland and the Republic of Ireland as to how national parks should be approached and managed so it may prove very timely to make recommendations to form a trans-national Geopark in the wider Carlingford Lough area. This would undoubtedly attract significant investment and would provide an excellent opportunity to raise the profile of the region in the domestic and key overseas markets.

- **Visitor Information:** The provision of information on and the marketing/promotion of the resource must be improved. While there is already considerable published information available on the product it is fragmented and difficult for

visitors to conveniently access. A more integrated, co-ordinated and accessible information and marketing/promotional effort would therefore be beneficial.

The marketing and promotion effort should also focus on generating awareness of the benefits of the resource for local residents, and demonstrate its potential usefulness to them both as an economic and a social/recreational tool.

- **Events:** It is essential to create a 'hook' for visitors to the area by establishing an annual event based in the Carlingford Lough area e.g. an annual Maritime Festival. The arrival of the Tall Ships in recent years has created much interest in maritime activity in the area. This should become an annual event in the maritime calendar.
- **Roads Infrastructure:** Much has been done to upgrade the link road from Dundalk to both Greenore and Carlingford over the past decade or so and it is now above the standard of many primary roads in other parts of the country. Significant funds have also been spent on other roads in the general Cooley Peninsula area, including grants under the CLAR programme.

Development of the Southern Relief Road: The Greater Newry Vision Plan supports the development of a southern bypass linking the Newry-Warrenpoint A2 route to Cloghogue Junction on the A1 from Belfast to Dublin.

- **Provision of a Ferry:** The provision of a car ferry from Greenore to Greencastle would offer a great attraction and facility for tourists in the area. Similar operations in Donegal, Clare, Kerry, Down and Western Scotland have shown that ferry operations can act as powerful levers for local development.

The Newry Dundalk Joint Chamber Forum applied for funding and was approved for funding from the INTERREG IIIA – European Structural Funds 2000-2006, administered by The East Border Region, to develop a business case analysis for the proposed car ferry service. In September 2004, Campbell Conway Consulting was commissioned to undertake the study. East Border Region has been involved over many years in promoting the advancement of this project.

Whilst a recent study undertaken by Kirk Mc Clure Morton on behalf Dundalk Chamber of Commerce identifies potential sites and the likely costs for construction of land based works connected with provision of a ferry service, it will be necessary to carry out environmental scoping to determine possible impacts and mitigation measures required. This would allow a refinement of the structure types and locations to be completed so that the optimum design and location may be determined.

Future project promoters must note that both coastlines have environmental designations which should be considered in the future planning of possible ferry services. The Greencastle coastline including Mill Bay to Soldiers Point is designated under the European Commission Directive on conservation of wild birds. The same stretch of coastline is included in the Carlingford Lough ASSI (Area of Special Scientific Interest) covering mainly the coastal salt marsh and intertidal mud/sand.

The Greenore coastline has been designated NHA (Natural Heritage Area) and recently also been designated as Carlingford Shore SAC (Special Area of Conservation). This SAC designation falls under the European Commission Directive on natural habitats covering mainly the perennial vegetation along the coastal stony banks and drift lines of Carlingford Lough.

The Greater Newry Vision plan supports the concept of a bridge at Narrow Water as maximising the potential for tourism in the region.

- **Improvement of Safety Standards:** The culture of safety that currently exists within the participants and organisations associated with sailing and boating activities commands a deserved respect from other adventure sporting bodies. The challenge is to develop initiatives that serve to make participation in the sport safe, whilst at the same time retaining the allure of its adventurous nature. Measures to minimise hazards and improve information for boat based activity must be implemented (e.g. provision of a pilot book for small craft; markings on key sandbanks and rocks; complete survey of the bed and shores of the Lough).
- **Automation of gates at Victoria Lock:** The opportunity to sail into the heart of a city centre is a major advantage and strong selling point for any marine tourism focused destination. At present the gates at Victoria Lock are manually operated and require significant resources to open and close to allow passage for visiting boats. A lengthy notice period of up to four weeks is currently required to access the Newry Canal via the Locks, which is impractical from a tourism perspective. However the gates at Victoria Lock will be completely automated from May 2007, greatly improving accessibility from Carlingford Lough to Newry Canal.

Vessels wishing to gain access to Newry Canal via Victoria Lock must radio through to the Harbour Authority in Warrenpoint Port to request the gates to be opened. A similar system is in operation in Preston, England. Visiting boats will then be able to sail up Newry Canal and moor in the Albert Basin, which currently has 15 berths but has considerable potential to develop additional pontoons and mooring facilities for both resident and visiting vessels.

- **The appointment of a working group and dedicated project Manager/Team:** If the area is serious about realising its vision of establishing a sustainable marine tourism industry, it is envisaged that this cannot be achieved solely through a voluntary committee but must involve directly employed dedicated staff resource.

## Chapter 7: Summary and Recommendations

The sustainable growth of the marine tourism industry in the Carlingford Lough area will depend very much on pragmatic development policies, which take into account the relationship between the industry and the surrounding environment.

Any effort to develop Carlingford Lough as a leading tourism destination for marine based recreation and leisure activities will have obvious benefits for the wider economy. Future projects will need support from various stakeholders including local authorities, public bodies, tourism providers, activity providers, local tourism working groups, local traders, tourism organisations and community groups.

It is therefore imperative that any strategy or action plan devised is consistent with and easily integrated with strategies developed at a national level by organisations such as Northern Ireland Tourist Board, Fáilte Ireland, Tourism Ireland, the Marine Institute and the Loughs Agency, Armagh Down Regional Tourism Partnership, and East Coast and Midlands Tourism.

The development directions outlined in this report can only be achieved if, as well as securing the commitment of key local stakeholders to implement individual projects and actions, complementary financial support and technical guidance is provided by Government and the European Union.

It is hoped that a management team be set up from which will be launched a series of action teams to draw on support from funding bodies and private sector enterprises. At a strategic level, the management team will provide the co-ordination necessary to secure the funding and political support which is required if Carlingford Lough is to fulfil its potential.

The management team will not be a delivery body and will not duplicate activities carried out by other organisations. Its role will be to act as a facilitator to influence the speed of implementation actions and ultimately to realise the potential of Carlingford Lough for marine tourism.

The main recommendations identified in this report are outlined below:

- Ensure the development of the marine tourism resource is *market-led* rather than supply-driven.
- A '*visitor profiling*' market research survey should be commissioned focussing on type of visitor, purpose of visit, length of stay, activities undertaken and facilities/services used.
- *Market segmentation analysis* clearly shows that future marketing efforts should focus on the domestic market which provides 53% of all visitors and 26% of tourism revenue in Ireland. Britain is an important secondary market providing 28% of all visitors and 26% of tourism revenue in Ireland. Combined, these two markets provide 80% of Ireland's visitors.
- *Identify key projects and prospective partners*, particularly trans-national partners in Western Scotland, in preparation for *INTERREG Funding 2007-2013*.

- *Develop a strong brand* to promote the entire product offering on Carlingford Lough in a cohesive manner. To maximise the awareness of Carlingford Lough and the Mourne Mountains in key target markets it may be prudent to brand the region as “*Carlingford Lough and the Mournes*”.
- *Form appropriate clusters* of service and product providers to achieve critical mass and economies of scale.
- *Products and activities should be packaged* in a market-led, price sensitive way for each target market sector to enhance its appeal to prospective visitors.
- *A sales and marketing campaign should be undertaken* to raise the profile of the area as a visitor destination once the new brand has been agreed. A business development focus is required to pro-actively promote Carlingford Lough to organised groups and independent touring companies.
- *Gaps in infrastructure* and product development that hinder the marine tourism potential of the area should be addressed, e.g. marina development, incentives to encourage accommodation providers to provide facilities for anglers, etc...
- *Identify suitable public/private partnerships* to undertake economic assessments and progress marina development on both the northern and southern shores of Carlingford Lough.
- *Commission a ‘coastal moorings’ study* to assess the need, potential sites and costs of developing additional moorings which would create the much needed ‘necklace’ of mooring points for boats to move around the Lough .
- *Seek the support of Local Authorities* as any major capital development projects are likely to involve the use of public assets, therefore requiring a partnership approach in which the local authority, in partnership with community and private interests, works to secure the future of the marine tourism offering and maximise the area’s assets.
- *Maximise the advantage of having the Loughs Agency* based in the area. As a cross border organisation with a remit to develop recreational and leisure based tourism in Carlingford Lough and Lough Foyle, the Lough’s Agency will be a key partner in efforts to attract funding for marine tourism based projects.
- A lobbying approach should be adapted to strengthen relationships with both Fáilte Ireland and Tourism Ireland to develop initiatives which will encourage the regional dispersal of visitors. Considering 81% of all visitors to Ireland arrive by air, the majority of which arrive via Dublin there is a huge challenge for Tourism Ireland and Fáilte Ireland to address the issue of regional dispersal.
- Maximise the ‘must see’ attribute of the National Park brand if the planned *designation of the Mournes as a National Park* proceeds. As Carlingford Lough provides a natural link between the Mournes, Cooley Peninsula and Slieve Gullion it may be prudent to seek UNESCO Global Geopark status for the area as a trans-national park.
- A more integrated, co-ordinated approach must be adapted to providing marine tourism related *product information*.

- *Establish an event strategy* which supports a number of key high profile indigenous events with the capacity of grow and have international appeal, thus attracting considerable visitors to the area, particularly overnight visitors.
- *Support the development of the proposed Southern Relief Road* linking the Newry-Warrenpoint A2 route to Cloghogue Junction on the A1 from Belfast to Dublin, which would considerably enhance the touring route around the Lough.
- *Commission an environmental scoping study for the provision of a car ferry* from Greenore to Greencastle to determine possible impacts and mitigation measures required. The proposed car ferry across the Lough would form a circular touring route and provide an important link from the main Belfast to Dublin motorway to the proposed Mourne National Park.
- *Measures to minimise hazards and improve information for boat based activity* must be implemented (e.g. provision of a pilot book for small craft; markings on key sandbanks and rocks; complete survey of the bed and shores of the Lough).
- *Raise awareness of the automation of gates at Victoria Lock* from May 2007 onwards and promote the opportunity to sail into the heart of Newry City centre. The development of additional moorings at the Albert Basin in Newry must be considered in any overall marina/moorings plan for Carlingford Lough.
- *A working group and dedicated project Manager/Team should be appointed* to realise the vision of establishing a sustainable marine tourism industry for Carlingford Lough.

## APPENDIX 1

Country	Name	Berths	Area
Scotland	Clyde Marina	292	Ardrossan, Ayrshire
Scotland	Troon Yacht Haven	300	Troon
Scotland	Portpatrick Harbour	50-60	Portpatrick
Scotland	Kirkudbright Marina	50	Kirkudbright
Isle of Man	Douglas Harbour Marina	70	Isle of Man
England	Maryport Marina	170	Cumbria
England	Whitehaven Marina	200	Cumbria
England	Glasson Dock Marina	240	Lancaster
England	Fleetwood Marina	300	Fleetwood
England	Preston Marina	125	Preston
England	Liverpool Marina	400	Liverpool
England	Milford Marina	280	Milford Haven, Pembrokeshire
England	Neyland Yacht Haven	420	Neyland, Pembrokeshire
Wales	Deganwy Quay Marina	165	Conwy
Wales	Conwy Marina	500	Conwy
Wales	Holyhead Marina	20	Gwynedd
Wales	Port Dinorwic Marina	260	Gwynedd
Wales	Victoria Dock Marina	46	Caernarfon, Gwynedd
Wales	Hafan Pwllheli Marina	400	Pwllheli
Wales	Aberystwyth Marina	85	Ceredigion
N. Ireland	Lough Swilly Marina	406	Inishowen, Donegal
N. Ireland	The Foyle Pontoon		Derry
N. Ireland	Coleraine Marina	45	Coleraine
N. Ireland	Seatons Marina	70	Coleraine
N. Ireland	Ballycastle Marina	74	Ballycastle, Co. Antrim
N. Ireland	Glenarm Marina	35	Glenarm, Co. Antrim
N. Ireland	Carrickfergus Marina	280	Carrickfergus, Co. Antrim
N. Ireland	The Lagan Weir	0	Belfast
N. Ireland	Bangor Marina	560	Bangor, Co. Down
N. Ireland	Copelands Marina	60	Donaghadee, Co. Down
N. Ireland	Portaferry Marina	15	Portaferry, Co. Down
N. Ireland	Phennick Cove Marina	55	Ardglass, Co. Down
Ireland	Carlingford Marina	280	Carlingford, Co. Louth
Ireland	Malahide Marina	350	Malahide, Co. Dublin
Ireland	Howth Yacht Club & Marina	350	Howth, Co. Dublin
Ireland	Dublin City Moorings	25	Dublin
Ireland	Poolbeg Marina	100	Ringsend, Dublin
Ireland	Dun Laoghaire Marina	475	Dun Laoghaire, Co. Dublin
Ireland	Arklow Marina	72	Arklow, Co. Wicklow
Ireland	Kilmore Quay Marina	35	Kilmore, Co. Wexford
Ireland	Three Sisters Marina	66	New Ross, Co. Wexford
Ireland	Waterford City Marina	100	Waterford
Ireland	East Ferry Marina	85	Cobh, Co. Cork
Ireland	Salve Marine	45	Crosshaven, Co. Cork
Ireland	Crosshaven Boatyard Marina	100	Crosshaven, Co. Cork
Ireland	Royal Cork Y.C. & Marina	170	Crosshaven, Co. Cork

Total: **8176**

*\*Source- Irish Sea Cruising Route Guide 2006.*