

# TOURISM MASTERPLAN FOR THE SHANNON

## VOLUME 3: BASELINE REPORT



Supported By

**Fáilte Ireland**



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by SLR Consulting Ireland in association with our partners  
TellTale, Alan Hill and AECOM.**

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*Cover Photo: Cruising and Angling on the Upper Shannon*

*Sarah McCarthy, Fáilte Ireland*

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## 1.0 Introduction

Waterways Ireland is one of six North-South Implementation Bodies established in 1999 under the British – Irish Agreement Act, 1999, and the supplementary North/South Co-operation (Implementation Bodies) (Northern Ireland) Order 1999. Waterways Ireland is charged with the management, maintenance, development and restoration of the inland navigable waterway systems under its remit throughout the island of Ireland, principally for recreational purposes.

Waterways Ireland and Fáilte Ireland have formed a strategic partnership to further enhance and promote the Shannon Region. This partnership has recently commissioned a **Tourism Masterplan for the Shannon Region**, to be developed by SLR Consulting and partners TellTale and Alan Hill Tourism, respectively, whose primary focus will be an assessment of the strategic tourism potential along the Shannon Corridor, from Limerick City northwards to Lough Allen, Lough Arrow and the Shannon-erne Waterway, respectively. See Figure 1 overleaf which identifies the Masterplan area.

The Masterplan will be a key step in the evolution of the new Fáilte Ireland strategy for ‘Ireland’s Hidden Heartlands’ which is one of the four key regional tourism experience brands. The ‘Hidden Heartlands’ promise to bring to life the Irish midlands’ rich natural assets including its many lakes, walkways and blueways, leveraging a growing tourism trend for soft activities by encouraging visitors to be ‘active in nature’.

The development of the *Beara Breifne Way*, Ireland’s longest inland way-marked way, and the *Shannon Region* have been identified as two transformative signature projects of scale that will unlock the region’s tourism potential. This Tourism Masterplan will identify strategic initiatives and projects within the Shannon Region and aims to identify sustainable tourism opportunities both on- and off-water, stimulating enterprises in the towns and villages surrounding it.

### 1.1 Aims of the Tourism masterplan

The key aims of this masterplan are to:

1. Identify **Products and Themes** with the most potential and offering a unique differentiator
2. **Destination Vision** – establish a shared view of the destination’s desired qualities (and profile) in the long-term, including land-based activities and attractions that will complement the water-based activities, and suggest best options to deliver on this.
3. Make **recommendations on other influencing factors** that will stimulate a varied product offering and quality experience e.g. Policy changes (Bye laws), innovative programmes to support private sector (tax incentives) or investment in infrastructure.

In implementing the Masterplan for the Shannon navigation, the objectives are to:

- Increase the distinctiveness and visitor appeal of the area and diversify the offer;
- Attract new visitors; encourage repeat visits
- Increase dwell times
- Drive economic and social benefit;
- Deliver authentic experiences;
- Be of scale;
- Protect environmental sensitivities; and
- Provide for sustainable development.

The Plan will be implemented over the short, medium and long term using a variety of funding streams, including the Fáilte Ireland capital grants scheme.



## 1.2 Tourism Masterplan – An Overview and Key Stages

Masterplanning is a process, as well as an illustrative output, used to coordinate development and secure identified outcomes. Once finalised the document will be used to shape, coordinate and deliver activity on the ground. The four key stages of the project methodology are outlined below.



## 1.3 Stage 1: The Baseline – Issues and Options Report

In accordance with project plan, this document presents both data gathered to date and emerging findings. It captures progress under the following tasks:

- Baseline analysis of tourism product, supporting services and gap analysis;
- Review of previous plans and strategies;
- Audit of accommodation/services/ trails/infrastructure/designations
- One to one consultations with Key Stakeholders
- On-Site audits & appraisals of tourism products and services;
- SWOT to identify tourism strength, gaps, opportunities, linkages by sub-region;
- An analysis of visitor trends; demographics, dwell time, travel patterns; requirements & expectations; and
- Review of best international practice in destination development, operating models, delivery.

## 1.4 Masterplan– Geographical Scope

The geographical area to be covered within this project includes the Shannon Navigation from Lough Allen to Limerick City and the Shannon-Erne Waterway, from the border with Northern Ireland (Belturbet) to Leitrim village. The study will also include Lough Key in Co. Roscommon, linked by a tributary to the Shannon.

For the purpose of the masterplan, the study area has been defined according to the following three character areas or sub regions.

- Upper Shannon area
- Lough Ree & Mid Shannon
- Lough Derg and the Lower Shannon

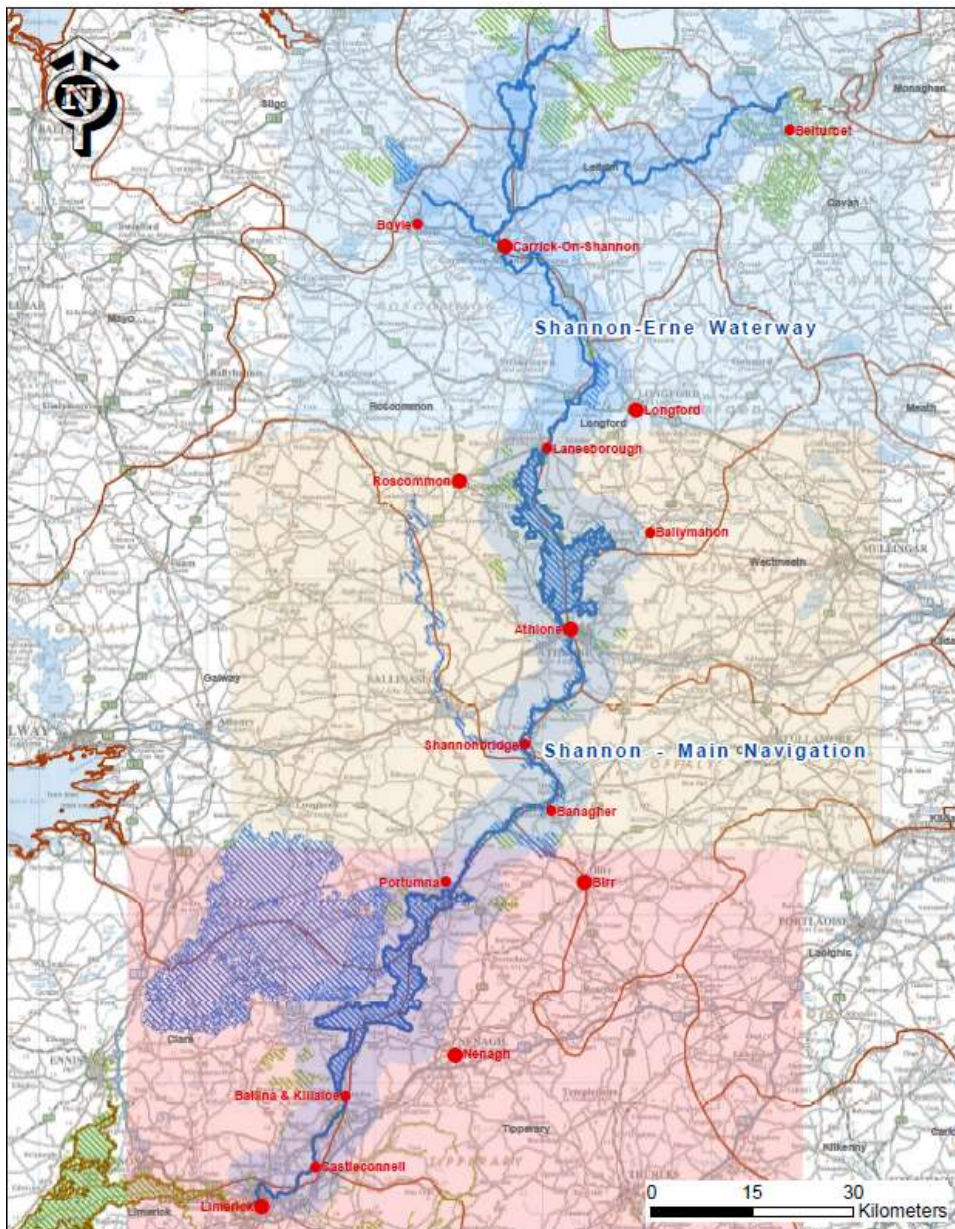


Figure 2 Map of Masterplan Boundary Indicating the 3 Sub Regions

## 1.5 Strategic Environmental Assessment

SEA Scoping consultation is currently underway and submissions can be made during a period of 8 weeks from the 17th December 2018 to 5pm on Monday 11th February 2019.

The next steps are

- The identification and evaluation of alternatives;
- Environmental assessment: an assessment of the likely significant impacts of the Draft Masterplan and completion the Environmental Report;
- Consultation on the Draft Masterplan and the Environmental Report
- Evaluation of the submissions and observations;
- Issuance of an SEA Statement.



*Skehana, Lough Derg, Co Tipperary on a misty winter's morning*

## 2.0 Strategic Tourism Context

### 2.1 Ireland's Hidden Heartlands

This Shannon Masterplan will be a key step in the evolution of the new Fáilte Ireland strategy for 'Ireland's Hidden Heartlands' (IHH) which is one of the four key regional tourism experience brands. Covering the 'heart' of the country, the Shannon Region of the masterplan extends from Leitrim southwards to Limerick City through counties Cavan, Roscommon, Longford, Westmeath, Offaly, East Galway, East Clare and North Tipperary. 'Ireland's Hidden Heartlands' promises to bring to life the Midlands' rich natural assets including its many lakes, walkways and blueways, leveraging a growing tourism trend for soft activities by encouraging visitors to be 'active in nature'. At present, the region has just a 2% share of overnight stays by overseas visitors to Ireland and a 3% share of overnight stays by domestic visitors. Fáilte Ireland has set a target to grow the visitor economy by 2% year on year.

### 2.2 The Brand Proposition

*Explore the lush green heartlands of Ireland's natural rural beauty....where activity and relaxation are centred around rural communities, that can be discovered across a lattice of land and water trails showcased by the iconic River Shannon and the Beara Breifne Way.*

The Tourism Masterplan for the Shannon Region aims to identify strategic initiatives and projects as well as sustainable tourism opportunities both on- and off-water, stimulating enterprises in the towns and villages surrounding it.

Key development principles include

- Support of 'catalyst projects' in clusters across region and 'practical initiatives' for business, SMEs and communities;
- Protect and sustain natural assets at core; and
- Work with business & communities to improve visitor orientation, experiences, and business network.

IHH targets visitors and holidaymakers from both Ireland and overseas. The main target markets are international and come from these two global segments:

#### *Culturally Curious*

- Independent "active sightseers"
- Looking to visit new places;
- Looking for a "feeling" of freedom;
- Wish to delve deeper into history and culture and consider "how and why";
- Seeking authentic experiences and will pay for a guide who offers real insight;
- Want unusual experiences, but also like a comfortable relaxed pace;
- Enjoy exploring, connecting with nature and wandering off the beaten track;



Figure 3 Area Map, Ireland's Hidden Heart/ands

- Will walk, cycle or pleasure boat to explore a new place;
- Usually travel in a couple or as individuals and rarely in a family group; and
- Age group is 40+.

### *Great Escapers*

- Looking for time out from busy lives;
- Go on holiday to recharge their batteries and reconnect with each other;
- Want rural holidays to connect with nature, but will also visit a castle or landmark;
- Want to feel the earth beneath their feet and to soak up the beauty;
- Want to get off the beaten track and experience the elements – stars, water etc.
- Will take part in more strenuous exploration than Culturally Curious, but not extreme;
- Appreciate peace and quiet between activities;
- Want the ‘wow factor’, but without too much effort – easily accessible; and
- Usually couples in their 30s, some with babies or quite young children.

## 2.3 Key Markets

In addition to the segmentation outlined above, developing the audience and destination development should involve consideration of the preference and profile of the four largest international markets who holiday in Ireland (Great Britain GB; United States US; Germany DE; and France FR)<sup>1</sup>.

### *Requirements of Key Markets*

For the IHH region, the domestic market will remain a key target market (short breaks, activities) and allow seasonal viability. The overseas market will supply lower numbers, but higher spending yield. In terms of recent trends, there has been significant growth in the US market, which is up by 3%, but a fall-off in the UK market, with the number of GB visitors down by 5%.

‘Sense check’ data have been collected by Fáilte Ireland in relation to the motivators for travel in relation to the four key markets. For example, French visitors are drawn to water but prefer sedate holidays. In contrast, the Germans are more interested in ‘active in nature’ holidays, and tend to be highly equipped, while the US visitors are more likely to be under 35 and ‘pack in’ activities due to shorter holiday times. Interestingly, the family market represents just 20% of all 4 overseas visitors.

German visitors tend to stay longer i.e. 9 days or longer, tend to use B&Bs and Guesthouses and are attracted by the coastline, as there is a limited area of coastline along the German North Sea and Baltic Sea. 42% of the French visitors are attracted to Dublin and to the Southwest with an approximate ratio of 60/40 visits respectively. The French are attracted by authenticity. 33% of all overseas visitors come back again, particularly the UK and French markets.

### *Motivations for Travel*

Fáilte Ireland research indicates that experience brands act as the shop window for overseas visitors and drive holiday decisions. In terms of ‘paths to purchase’, word of mouth accounts for 51% and the internet accounts for 49%.

Other motivators to travel include the perception that there are lots of things to do and there is a rich experience on offer. Attractions are less of a motivation with 60% of visitors not having heard of an attraction prior to booking. Emerging findings from Fáilte Ireland’s ‘innovation screener’ research, which gathered data from online surveys, involving approximately 21,000 responses, is that the key influencing factors in relation to booking holidays over the next three years are:

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<sup>1</sup> Research data sourced from Fáilte Ireland Research Team, December 2018; also ‘Fáilte Ireland Facts’ online [www.failteireland.ie](http://www.failteireland.ie).

- Proximity and similar product domestically - *reduces need to differentiate*
- Landscape – *emotional and romantic*
- Iconic /Historical - *promise*
- Depth of experience – *particularly in nature.*

**Key factors in considering Ireland as a destination include:**

- Plenty to see and do (90%)
- Safe and secure (88%)
- Interesting history & culture (85%)
- Ease of access (80%) – thus carriers are very important.
- Size for touring (50%)
- Good shopping (20%).

Additional research by Kantar Millward Brown (Innovation Screener, 2017) for Fáilte Ireland focused on Lough Ree as a lake experience, and demonstrated perceptions that the Lough promised:

- undiscovered, unspoilt;
- rivers, lakes, islands, bogs;
- explorable by bike, on foot or boat; and
- wildlife.

The appeal lies in *'idyllic – relocation – slow- away – freedom – natural gem – conservation & wildlife'* which appealed to the French market in particular. Lough Ree itself would not be the main reason to travel; thus, it needs to be bundled with other offerings to broaden its appeal.

Research has highlighted the importance of the experience brands, iconic historic attractions, boat trips (particularly along the coast) and the availability of activities or bundles of activities. Safety and security are also growing factors, as well as regionality and extended seasonality.

Germans like activities in an unspoilt landscape, with a variety of offerings. USA visitors love heritage and castles; the French seek unspoilt landscapes and elemental experiences (very attracted to water); while the UK market needs a different 'Celtic' story (otherwise they perceive their history as too similar to ours). Stories to be told should be social, 'salacious' with nuggets of information to capture visitor interest. FI favour the 'local ambassador' model to provide this to visitors (cf. Killarney, Kilkenny) and their TIC team run training in this element of the visitor experience.

Research also suggests that an area such as the Shannon Region needs to cross-sell everything to do or see there, as an information hub (i.e. 'join the dots'). There must be a reason to come, to stop and a motivation to stay. It is also clear that night-time activities are needed to attract and keep visitors as well as food and accommodation. A destination thus needs to 'get to' potential visitors before they make their holiday decisions by appropriate marketing and judicious use of the internet.

**Table 1 Profile of Main Overseas Markets**

Main Overseas Markets	GB	US	Germany	France
<b>Potential of the market for Ireland</b>	<p><b>Ireland's largest source market;</b> 2.9m visitors in 2013, an increase of 5.6% over 2012</p> <p>42% of all our overseas visitors are from GB</p> <p>36% of all our overseas holidaymakers are from GB</p> <p>64% of GB outbound market are interested in visiting Ireland in the future</p>	<p>Our 2<sup>nd</sup> most important market; it grew by 14.5% in 2013 to 1.036m visitors</p> <p>US visitors are our highest spenders and our most affluent visitors</p> <p><b>They stay longer and travel around more</b></p>	<p>Ireland's <b>3rd largest source market;</b> 483,000 visitors in 2013, up 7.7% over 2012</p> <p><b>Activity is important for many;</b> 28% take part in hiking/walking and <b>Germany is the largest market for overseas anglers,</b> which accounts for 15% of all overseas angling visits</p> <p>68% of outbound market have expressed an interest in visiting Ireland in the future</p>	<p>Ireland's 4th largest source market; 434,000 visitors in 2013, up by 9.4% on 2012</p> <p>60% of outbound market expressed an interest in visiting Ireland in the future</p> <p>French people take an average 4 holidays per year, 1.5 of these are abroad holidays</p>
<b>Size of the segments</b>	<p>4.8m Social Energisers</p> <p>4.7m Culturally Curious</p> <p>5.5m Great Escapers</p> <p>100% of GB Social Energisers who have been to Ireland rate it 8/10.</p> <p>More than half of Culturally Curious were happy with value provided</p>	<p>36.7m Great Escapers</p> <p>26.4m Social Energisers</p> <p>12.9m Culturally Curious</p>	<p>16.6m Great Escapers</p> <p>7.6m Culturally Curious</p> <p>7.6m Social Energisers</p>	<p>8.3m Great Escapers</p> <p>6.7m Culturally Curious</p> <p>6.4m Social Energisers</p>
<b>Activities In order of preference<sup>2</sup></b>	<p>Visit a nature reserve or park</p> <p>Walking up to 5km</p> <p>Boat trips</p>	<p>Visit a nature reserve or park</p> <p>Walking up to 5km</p>	<p>Visit a nature reserve or park</p> <p>Walking up to 5km</p> <p>Boat trips</p>	<p>Visit a nature reserve or park</p> <p>Walking up to 5km</p> <p>Boat trips</p>

<sup>2</sup> Getting Active in Ireland's Ancient East, A toolkit for activity providers, Failte Ireland, 2017)

Main Markets	Overseas	GB	US	Germany	France
		Hiking/Country Walking (5km+) Outdoor adventure Parks Any watersports	Boat trips Cycling (up to 20km+) Any watersports Hiking/Country Walking (5km+)	Hiking/Country Walking (5km+) Outdoor adventure Parks Any watersports	Hiking/Country Walking (5km+) Outdoor adventure Parks Any watersports
<b>What age are they?</b>		A greater portion over 35s 48% are over 45 Mostly couples and a quarter in other adult groups Less child or family focussed	Slightly older than European visitors, 25% are over 55 44% are over 45 Almost half visit as part of a couple	22% are under 24 24% are 25-34 16% are 35-44 38% are over 45 39% couple 12% family 23% with other adults	Younger than other markets; just 27% are over 45 36% couple 25% family (more than twice the number of Germans who travel with family) 19% with other adults
<b>Access</b>		8 out of 10 air 2 out of 10 hire a car 2 out of 10 bring their car	99% air 46% hire a car	75% air 25% by sea 32% hire a car <b>23% bring their car</b>	80% air 20% sea 18% bring their car 37% hire a car
<b>Will they return</b>		76% will return	50% will return	54% will return	50% will return.

## 3.0 Planning Policy in relation to Shannon Region & IHH

The statutory planning system in Ireland as it relates to National, Regional and County Plans is currently undergoing significant change. Planning legislation recently introduced contains much stricter requirements for consistency between plans in the hierarchy. County Development Plans (CDPs) are now required to deliver objectives identified at the regional and national level. With all three Regional Spatial & Economic Strategies (RSES) currently at the public consultation stage, **it is critical that these plans identify a requirement for CDPs to deliver relevant aspects of the tourism masterplan for the Shannon Region.**

The Shannon Region is unique in terms of scale and also forms a significant boundary, historically for the provinces, and currently for both counties and regions. With Brexit on the horizon, Ireland's Inland Waterways present a basis for continued cohesion and a lessening of the impact on the border region.

### 3.1 National Planning Framework

The National Planning Framework (NPF) makes a number of crucial points in terms of the tourism geography on the Island of Ireland. The emphasis is on all-island tourism initiatives. The NPF states that:

- Both Ireland and Northern Ireland are attracting the same top four markets from visitors outside of domestic markets, with Fáilte Ireland, Tourism Northern Ireland and Tourism Ireland seeking to capture greater international interest by promoting **strategic attractions of scale.**
- There are further opportunities to maximise market exposure through **co-operation and themed 'branding bundles'** including linking the Causeway Coast with the Wild Atlantic Way and the lakelands border region with Ireland's Ancient East brand - (*the same can be said of IHH*).
- Development of blueways, such as the Shannon- Erne Blueway and greenways such as the Ulster Canal Greenway offer potential for an enhanced tourism offering throughout the border area.
- There are currently no dedicated long-distance cycling/walking routes which link Northern Ireland and Ireland, although INTERREG V EU funding is assisting with their development. **There is potential for existing way-marked trails within border areas in Ireland to link into established trails within Northern Ireland.**

#### Relevant National Policy Objectives

NPO 22

- Facilitate tourism development and in particular a National Greenways, Blueways and Peatways Strategy, which prioritises projects **on the basis of achieving maximum impact and connectivity at national and regional level.**

NPO 46

- In co-operation with relevant Departments in Northern Ireland, **enhanced transport connectivity between Ireland and Northern Ireland**, to include cross-border road and rail, cycling and walking routes, as well as blueways, greenways and peatways.

NPO 49

- Support the coordination and promotion of **all-island tourism initiatives** through continued co-operation between the relevant tourism agencies and Tourism Ireland.

3

A new regional assembly structure now enables the preparation of *Regional Economic & Spatial Strategies* for the 3 regions. Once adopted, each RSES will set the framework for local economic development and spatial

planning in each of the 10 local authorities in the masterplan area. Policy alignment on a statutory basis between the Tourism Masterplan, RSES and CDPs will help to secure support for and implementation of proposals identified within the Tourism Masterplan.



**Table 2 Status of the 3 Regional Economic & Spatial Strategies**

Regional Economic and Spatial Strategy	Consultation
<b>Draft RSES for the Southern Region</b>	Public consultation ends on the 8th March 2019
<b>Draft RSES for the Eastern and Midlands Regional Assembly</b>	Public consultation ends on the 23rd January 2019
<b>RSES for the Northern and Western Regional Assembly Area</b>	Public consultation ends on 8th February 2019

### 3.2.1 Draft RSES for the Southern Region

The Draft RSES for the Southern Region identifies the role of the Limerick – Shannon Metropolitan Area. It refers to **Limerick City** as Ireland’s third largest city. The nearby town of **Shannon** in Co. Clare is a significant employment centre with assets such as Shannon International Airport, Shannon Free-Zone and the International Aviation Services Centre (IASC).

**Nenagh** is identified as a Key Town with major synergies with MASP (Metropolitan Area Strategic Plan). The town is located only 90 minutes from Dublin with excellent connections to the capital via the M7. Nenagh and its hinterland area have potential as a location for a vibrant and diverse enterprise mix including major research and development functions, **tourism, water-based and outdoor recreation**, renewable energy and emerging sectors such as agritech, life sciences, financial services and engineering.

**Regional Policy Objective 9: Key Towns**

- c. It is an objective to support and promote vibrant, culturally rich and revitalised Key Towns with enhanced social inclusion, sustainable neighbourhoods and a high level of environmental quality to ensure an excellent quality of life for all.
- d. It is an objective to support and promote **Placemaking in all Key Towns to include public realm regeneration and urban renewal initiatives.**

**Table 3 Regional Policy: Nenagh**

Attributes	Infrastructural Requirements
High quality of life, strong retail offering, attractive town centre, vibrant cafe and restaurant offering.	Delivery of the Nenagh Traffic Management plan and associated public realm works and a Local Transport Plan.
Renowned centre for sporting tourism	Continued investment and development of the historic core of the town as a key driver of tourism. Identification and <b>development of Nenagh as the Gateway to Ireland’s Hidden Heartlands.</b>
Proximity to Lough Derg and the Silvermines Mountains and tourism-focused settlements such as Ballina, Killaloe and Dromineer	

Examples of attractions in the Mid-West include, inter alia, the promotion of **Ireland's Lakelands**, the Shannon Estuary and its islands as tourism and recreation destination, greenways, blueways, effective place making, Munster Vales, the Burren, Cliffs of Moher, West Clare NST tourism route, Loop Head, Bunratty, **Holy Island, Lough Derg, Shannon Estuary Way**, festivals (e.g. Willie Clancy Festival), Limerick City's **St. Johns Castle**. It is an objective to support utilisation and realisation of the Mid-West's existing and emerging tourism assets.

**The promotion of enhanced transport networks including public transport services is essential to attract and enable ease of movement around the region by tourists and visitors.** Improvements are needed at key arrival points such Ferry Ports with better public transport connections and improvements to the existing road and rail networks/services to remove bottlenecks and increase and improve connectedness to and between key tourism destinations. The identification of strategic corridors can assist in the development of the network between our cities, towns and rural areas.

#### **Regional Policy Objective 51: Tourism**

It is an objective to:

- a. **Enhance provision of tourism and leisure amenity** to cater for increased population in the Region including recreation, entertainment, cultural, catering, accommodation, transport and water infrastructure inter alia;
- b. Promote **activity tourism**;
- c. Sustainably develop the road network and **public transport services and facilities for improved visitor access, longer dwell times due to improved connectivity to ports and airports and tourism growth**;
- d. Sustainably develop **walking and cycling trails** opening greater accessibility to the marine and countryside environment by sustainable modes and promote the sustainable designation and delivery of Greenway and Blueway Corridors.
- e. facilitate appropriate tourism development and in particular a **National Greenways, Blueways and Peatways Strategy**, prioritising sustainable projects that achieve maximum impact and connectivity at national and regional level;
- f. **identify and map catchment areas concerning Culture, Heritage and Tourism of regional significance/scale.** Such catchments should have the potential to deliver small scale economic development and using wider local services such as Post Offices and local public transport.
- g. Support the relevant authorities in the development of **specific monitoring protocols for visitor pressure to ensure that tourism activities are maintained within sustainable limits for the European sites in the region.**

### 3.2.2 Draft RSES for the Eastern and Midlands Regional Assembly

Athlone's central and accessible location nationally at a key nodal point between Dublin and Galway and at a principal crossing point on the River Shannon further enhances its role and potential. Athlone's strong historic and cultural core, along with its attractive natural environment along the banks of the River Shannon, provides for significant tourism opportunities and an enhanced quality of life for both residents and visitors to the town.

In order to enhance co-ordination of development in Athlone where the town and its environs lie within the combined functional area of two Local Authorities, the preparation and adoption of a **Joint Urban Area Plan (UAP)** shall be a priority for Westmeath County Council and Roscommon County Council following the adoption of the RSES. The vision provided for, in the draft RSES is that Athlone, will act as the lead town for future development in the Midlands to become a Regional Growth Centre with a population target in the Region of 30,000 by 2031.

The **Joint UAP** shall support and provide for an enhanced urban environment and improve sustainable modes of transport with a particular focus on the following key objectives:

- Support the implementation of the **Athlone Waterfront Strategy (2011)** to provide for a strategic approach to waterfront management, amenity provision, tourist related developments and environmental awareness along the waterfront within the town.
- Support construction of a **new pedestrian and cycleway bridge across the River Shannon** in Athlone as part of the Galway to Dublin Cycleway.
- Support the role of lands on the **Western Bank as a Cultural and Tourism Quarter**.
- **Support public realm enhancement works along the River Shannon's waterfront** at The Quay and along The Strand to **maximise tourist footfall along the river**.
- Provide for a **public park** within the Monksland/ Bellanamullia (Athlone West) LAP lands.
- Provide a **walkway and nature park** adjacent to the Cross River.

There are significant opportunities to develop a number of flagship greenways in the Region;

- **Greenways:** The **Dublin-Galway National Cycling Greenway** offers potential to link the marketing of the Wild Atlantic Way, Ireland's Ancient East and **the Hidden Heartlands** and connect to the EuroVelo network of long-distance European cycling trails. Other regional greenways under development include the **Old Rail Trail between Athlone to Mullingar**, which highlights the potential to develop disused railway lines in the Region.
- **Blueways:** The development of navigable inland waterways in collaboration with Waterways Ireland including; the Shannon and Shannon-Erne connecting the islands of Lough Ree, Clonmacmoise and Shannon Harbour; linking the Royal Canal with the Grand Canal along the River Shannon.
- **Peatways:** There is potential in the midlands to develop a regional peatway interconnecting a range of biodiversity and cultural hotspots such as the Mesolithic (first settlers) site in **Lough Boora, Co. Offaly** and the **Iron Age bog road in Corlea, Co. Longford**.

#### Peatlands

The Lough Boora Discovery park in Co Offaly is a Bord na Mona cutaway bog, which has been developed as an outdoor amenity area with restored wetland and woodland habitats that provide important habitats for a wide diversity of animals, birds and plants. It includes a sculpture park, angling and bird watching facilities and extensive walking routes. **There is potential to develop a regional peatway connecting natural and cultural attractions and the Mesolithic (Iron age) bog trails and to develop a National Park based on the raised bog peatlands of the Midlands area.**

### 3.2.3 RSES for Northern & Western Regional Assembly

The Draft RSES provides for targeted growth in the Regional Centres and the network of Key Towns will take the lead in a regional context. In order to address the weak urban structure in the northern and western region, it is necessary to target growth of the Regional Centres by at least 40% and the Key Towns to have a targeted growth of at least 30%.

	Centres	2016 population
Regional Growth Centres	Athlone	25,000 (uplift to by 10,000 to 2040)
Key Town	Carrick-on-Shannon	4,100

**Athlone** is designated as a Regional Centre and the town fulfils an important role in terms of an employment centre, an educational centre, an administrative centre, a retail centre, a transport centre and a tourism centre.

The following regional objectives relevant to the Shannon Masterplan are considered priorities for the parts of Athlone within this Region:

- 2. Provide a public park and a riverside walk (Cross river) in Monksland.
- 6. Support the promotion of **Athlone as a designated centre in the development of Hidden Heartlands.**
- 9. Support the provision of a **new pedestrian and cycle bridge across the Shannon.**

**Carrick on Shannon** is designated as Leitrim’s County Town and whilst it is the smallest of the Support Towns it plays a strategic role in the region. Regional objectives for the town include:

- **Development of the tourism offer** and the thriving Purple Flag Status of the town that supports a variety of support enterprises in the surrounding countryside.
- Deliver on the Blueway development under the Upper Shannon Erne Future Economy project (USEFE); it will develop tourism in the rural areas of Cavan, Leitrim, Longford and Roscommon, connecting 22 towns and villages located alongside the River Shannon and the Shannon-Erne Waterway.

## 3.3 National Strategies

The following national strategies are relevant to the emerging Tourism Masterplan. Of particular note is the *Outdoor Recreation Plan for Public Lands & Waters in Ireland (2017-2021)* which offers significant scope for synergies and coordinated action among public agencies.

### Outdoor Recreation Plan for Public Lands & Waters in Ireland (2017-2021)

Let by the Department of Culture Heritage and the Gaeltacht (DCHG), the Plan was prepared jointly by Coillte, NPWS, Waterways Ireland, Bord na Móna and Inland Fisheries Ireland.

It was developed by five public landowning organisations as ‘creating step change’ in delivery of outdoor recreation opportunities on public lands and waters, comprising 15% of Ireland’s land surface.

It focused on 7 strategic themes:

- (i) managing & maintenance of recreational infrastructure; improving recreational facilities;
- (ii) developing consistent standards;
- (iii) promotion of outdoor recreation;
- (iv) professional development of staff;
- (v) developing a culture of outdoor recreation and volunteering in Ireland; and
- (vi) maximising the benefits to communities.

The Outdoor Recreation Plan (2017-2021) estimates the **value of outdoor recreation annually to Ireland's economy is €1.2 billion**. Also estimated that €165 million investment is required over five years (2017-2021) to manage, maintain and upgrade the recreational assets on public lands, with the potential to generate an additional €142 million per annum as the market grows.



**Figure 4 Extract from the Outdoor Recreation Plan (2017-2021) (original GIS to be sourced)**

### The Strategy for the Future Development of National and Regional Greenways Strategy 2018

This strategy is published by the Department of Transport, Tourism, and Sport (DTTS) sets out how National and Regional Greenways in Ireland should be planned and constructed and sets out a framework for funding of Greenway projects.

The objective of the Strategy is to assist in the strategic development of nationally and regionally significant Greenways in appropriate locations constructed to an appropriate standard in order to deliver a quality experience for all Greenways users. It also aims to increase the number and geographical spread of Greenways of scale and quality around the country over the next 10 years with a consequent significant increase in the number of people using Greenways as a visitor experience and as a recreational amenity.

To achieve these objectives, the DTSS will ensure that project promoters will work with local communities, landowners, local authorities and other relevant State Bodies and organisations to deliver

1. A Strategic Greenway network of national and regional routes, with a number of **high capacity flagship routes** that can be extended and/or link with local Greenways and other cycling and walking infrastructure;

2. **Greenways of scale and appropriate standard** that have significant potential to deliver an increase in activity tourism to Ireland and are regularly used by overseas visitors, domestic visitors and locals thereby contributing to a healthier society through increased physical activity;
3. **Greenways that provide a substantially segregated off-road experience linking places of interest**, recreation and leisure in areas with beautiful scenery of different types with plenty to see and do; and
4. Greenways that provide opportunities for the **development of local businesses** and economies; and
5. Greenways that are **developed with all relevant stakeholders** in line with an **agreed code** of practice.

**Definition:**

<b>National Greenways</b>	at least 100 km long;
<b>Regional Greenways</b>	at least 20 km in length, but preferably closer to 40km long, or which can be extended to connect to a longer strategic route.

### Waterways Ireland - Development of a Visitor Experience Plan, Draft Report (CHL; March 2018)

This report refers to Waterways Irelands' core mission to 'manage, maintain, develop and promote over 1000 km of inland navigable waterways principally for recreational purposes. This focus on recreational purposes means that the waterways which are managed, maintained, and developed by Waterways Ireland are accessed by a diverse range of amenity users including local communities, domestic tourists and international visitors. Consequently, the effective delivery of its work programmes requires Waterways Ireland to work with partner agencies such as fourteen local authorities, Fáilte Ireland, Sport Ireland (National Trails Office), Canoeing Ireland, the Canoe Association of Northern Ireland, the Lough Derg Marketing Group, Destination Athlone, Destination Fermanagh, among others.

In pursuing this recreational focus, one of the more notable features of the work programmes developed by Waterways Ireland has been the development of a system of "blueways" which have been defined as:

'a network of multi-activity recreational trails, based on or alongside idyllic lakes, canals and rivers in Ireland. They provide scenic routes into the heart of rural Ireland by canoe, bike or on foot. Connect with friends and family as you escape to unique natural environments. Feel totally chilled out on a guided paddling trip; build up an appetite on an exhilarating electric bike trip; or gently meander on a canal-side walk. Tranquil *Blueway* journeys, where the pace of life is slow, along glistening waters, softly fringed and abundant with nature'.

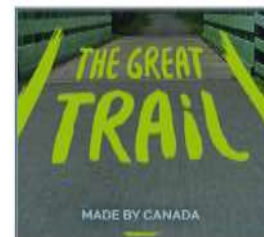


Photo: SLR Consulting

This report presents the main findings to emerge from research focusing on the visitor experience along the network and on what measures could be taken to improve and enhance this experience.

The Report states that Waterways Ireland’s investment in its Blueway network aligns well with contemporary consumer interest (both tourists and locals) in becoming involved in authentic experiences and in engaging with some aspect of “soft adventure”. The blueway network can serve as a medium through which visitors can connect with authentic Irish experiences, both on water and off the towpath, and do so at a slow pace which many tourists expect to experience during their visit to Ireland.

The study refers to ‘the *Great Trail* in Canada completion’. It comprises 24,000kms of multi-activity trails that join Canada from coast to coast, and 7,000kms of waterways. A comprehensive review of comparator trails was undertaken as part of this study and the key learnings are worth noting



includes  
here.

thereby

- 1) **Community engagement** is a strong element of many comparator destinations. The by-product of this is that communities are more invested in the success of the trails, spreading the burden of responsibility and leadership. There are a number of ways this can be done.
  - The development of a volunteer programme.
  - The identification and development of key Trail Towns that can act as visitor hubs.
  - Developing a membership model for businesses along the Blueway.
- 2) **A long term vision** drives the development of most successful trails and integrates key stakeholders in delivery.
- 3) **Capturing the hearts and minds** of the public is important in raising awareness and encouraging users. This has been done successfully by telling a ‘big story’ (e.g. the linking together of diverse geographies or different parts of a country) and by engaging public figures.
- 4) **Integrated technology-based mapping** is a valuable tool in allowing trail users to create and follow their own maps – harnessing nearby facilities and services as well as the core trails.
- 5) **Stewardship/Preservation** is a core feature of a number of comparator trails.
- 6) **Pre-Registration/licensing** of trail users.
- 7) **The landscape through which a trail travels** is an essential motivator for visitors and needs to be adequately promoted alongside the relevant trails.
- 8) Focussing on the **things to see and do along the trail** - places to stop off, park the boat or bicycle, and explore - creates a much richer visitor experience. Tour operators offering integrated trail experiences

focus on one specific activity (e.g. walking or cycling or paddling) and core service elements designed to make the users experience of the trail easy and convenient.



*Multiple activities to see and do on the Shannon*

## 4.0 The Shannon Region

### 4.1 Previous Studies / Strategies for the Shannon

There is a significant number of previous studies and strategies completed for the Shannon Region. Whilst useful in setting the scene and establishing a baseline, the studies were frequently not implemented for the following reasons:

- aspirational / overly focused on baseline assessment;
- Inconsequential without overarching statutory plan.

There was also a failure to properly integrate objectives and proposals as part of the existing statutory planning framework. In terms of delivery:

- No lead body was identified as responsible for delivery / implementation;
- Funding and delivery options were not identified.

As a result, leadership and governance remain significantly fragmented across the Shannon Region.

#### 4.1.1 The Future of Ireland's Inland Waterways (Heritage Council, 1999).

Augmented by *Integrating Policies for Ireland's Waterways* (Heritage Council, 2005a) which updated the 1999 paper, these *Future of Ireland's Inland Waterways* documents underpinned the subsequent development of the **Waterways Corridor Studies (2002-07)**.

The main themes of the 2005 position paper were:

- A strategic, coordinated and integrated approach to Ireland's inland waterways;
- Waterways Corridor Studies model to ensuring coordination and integrated management;
- Involvement of recreational users in management-planning, awareness-raising and interpretation;
- Sustained funding;
- Protection of disused and derelict waterways; and
- The long-term expansion and development.

The Heritage Council's main proposals were

- All navigable inland waterways should be under the remit of Waterways Ireland;
- Corridor studies as a tool for coordinated, integrated management, applied to entire inland waterways;
- Adequate funding should be made available to Waterways Ireland, including funding for major infrastructure and ongoing restoration projects;
- Heritage items within corridors should be considered within the context of the Irish landscape;
- Greater communication among users, other stakeholders and management authorities; and
- The Waterways network should be expanded, dependent on available funding.

#### 4.1.2 Evaluation of Waterways Corridor Studies (2002-2006)

WCSs aimed to promote integrated development along Shannon Waterway corridor:

- "Is a long way from being achieved", but positive elements include shared vision, detailed baseline information, clear recommendations, involvement of all local authorities and public bodies, and the engagement of user groups.
- Many LAs however continue to operate without reference to the studies (2007), as they were non-statutory plans.
- WCSs provide useful information for planners – seen as reinforcing planning policy in the CDPs, but while Planning control staff found WCSs useful in assessment of applications, information could not be used as reason for refusal when recommending decisions to Council.

- Planning staff asked that comprehensive management guidelines for rivers and lakes for local authorities should be in place to guide officials.

*Shannon Regional Fisheries Board (now IFI) comments:*

- Point source discharges are threat to water quality, from new developments and local authority wastewater treatment facilities;
- Water quality impacted by run-off from building sites (possibly increased by the Rural Renewal Scheme for the Upper Shannon) in tributaries and the lack of pump-out facilities for cruisers; and
- More action is needed from local authorities in maintenance of existing and provision of new facilities.
- New boating facilities are given planning permission in advance of adequate pump-out facilities.

*Shannon Development comments:*

- Lack of hard economic data in the Corridor Studies; wished to see an economic corridor included in any future studies.
- Recommendations must be realistic/ achievable, rather than aspirational; and
- A statutory body, such as a Shannon River Authority, to direct all activities on Shannon.

**KEY FINDINGS:**

- Key weakness is that the WCSs are non-statutory. Draft RSES now provides the opportunity to include statutory provisions in relation to the objectives of the Shannon Masterplan.
- Studies are not well known outside those of the project partners.
- Studies should be web-based and in GIS form.

Formal lines of communication are required for users' groups such as the IWAI, the Royal Canal Action Group and statutory bodies, including local authorities, Waterways Ireland, Fáilte Ireland, NPWS and Heritage Council.

### 4.1.3 Shannon Erne Waterway Boaters Welcome Scheme (May 2008)

This report focused on the quantitative research *Survey with Previous Inland Cruising Tourists and Qualitative Research with Service Providers in the Shannon Erne Waterway*. Research objectives include establishing whether hire boat users feel that the inland cruising experience could be enhanced.

It should be noted that the results of this research are dated and focus solely on the Shannon Erne Waterway and therefore limited in terms of age and geographic scope.

#### *Summary of Key Conclusions*

- **Irish inland cruising holidays attract high levels of repeat tourists**, with the majority having previously taken an inland cruising holiday in Ireland, and two fifths having taken at least four such holidays.
- **May to August were the peak cruising times**
- For the majority the main purpose of the holiday was to **relax and get away, with many also looking to experience cultural and outdoor activities**. Meet locals and other new people also featured strongly.
- Dublin is the main arrival location for the majority – British respondents were most likely to arrive via one of the ports, reflecting their proximity and likelihood to bring their car
- For those who do not have their own car, the hire boat companies appear to fill the transport gap, with **less than 10% resorting to public transport**.
- **32% of respondents relied on transport provided by the hire boat company.**
- **High levels of satisfaction** with accessing the boat hire location across all types of respondents, with over 9 in 10 being satisfied

- Those who used transport arranged by the boat hire company were the most satisfied, even more satisfied than those with their own car.
- There was a **higher level of dissatisfaction for those who used public transport.**
- Average group size was four people and only a third travelled with children – indicating a more adult focussed holiday
- On average respondents spent just under nine nights on holiday, with boats being hired for an average of seven nights. Unsurprisingly, **overseas respondents tended to visit for longer.**
- the majority booked their holiday directly, with two thirds booking via the Internet and another third booking by phone/post. **Notably, 20% of German visitors booked using a travel agency.** The British and Swiss are most likely to book over the internet. A further 10% of German visitors book directly via a tour operator in their country of origin. The figures for France are 12% via travel agency and 16% via a tour operator.
- Previous hire boat users participated in a wide range of activities including visiting sights, natural attractions, walking / hiking, and fishing. This shows the appetite for participating in a range of activities.
- There are high levels of satisfaction with most of the on-shore facilities in general, however there was a lack of information relating to BBQ and picnic facilities, evening entertainment, information provided at the stops, facilities for children and basic facilities such as electrical points and laundry.

#### 4.1.4 Lakelands and Inland Waterways Strategic Plan 2010-2015

The Shannon has become the focus of recent efforts to develop an integrated tourism product and related marketing strategies, as part of a larger effort by Waterways Ireland, Fáilte Ireland and the relevant Regional Authorities. The ground-breaking *Shannon Corridor Studies* presented above evaluated the environmental, heritage and tourism potential of the extent of Shannon system. The Fáilte Ireland/ Waterways Ireland *Lakelands and Inland Waterways Strategic Plan 2010-2015* set out the high-level vision for Ireland’s inland waterways, promoting the rivers, canals and lakes as an experiential form of tourism– based on heritage, water-based recreation and an authentic ‘real Ireland’ experience.



The strategic action plan focused product development in the following key areas:

Strategic Plan Action Plan - Product Development Summary	
Development of <b>activity hubs</b> with a particular focus on activities that can be booked on the day, or at short notice	Development of the Lakelands and Inland Waterways <b>website to allow easier self-packaging</b> by visitors.
Development of <b>products based on the literary heritage</b> of the area and on related events and festivals	Working with the <b>cruising sector</b> to increase flexibility and provide for shorter stays and combined interest

Strategic Plan Action Plan - Product Development Summary	
	holidays
Identifying the feasibility of <b>developing a scheduled waterbus service</b> and or more linkages between existing boat trips to allow the visitor to travel the Shannon and Erne systems without a car.	The development of a <b>visitor route</b> through the area presenting the best of the historic houses, castles and gardens. Improving the capacity of some attractions to host visitors.
Development of a <b>coordinated events programme</b> and provision of more high-profile events	The <b>development of a Christian heritage visitor route</b> with a hub at Clonmacnoise and which runs from Lough Derg in Co Donegal to Lough Derg on the Shannon and to Limerick. Investigation into the feasibility of providing more access to Christian heritage sites from the water and the development of a water route through the area.
Implementation of a ' <b>choice of things to do each day</b> ' programme associated with the main activity hubs.	<b>Development of the capacity to access and enjoy the natural heritage of the area.</b> Key hubs at Marble Arch Global Geopark and Lough Boora with secondary sites elsewhere. Provision of guided experiences at sites.
Further development of <b>waterways infrastructure</b> to support recreation and tourism	To review the <b>match of accommodation supply</b> with the needs of the primary market
To further develop <b>cycle, walking and equestrian</b> trails	

The Lakelands & Inland Waterways brand has been superseded by *Ireland's Hidden Heartlands* to a large extent, but many of the product proposals remain valid for consideration within the context of the Tourism Masterplan for the Shannon Region.

## 4.2 Recent Research

### 4.2.1 Valuing Ireland's Rural & Urban Inland Waterways, 2016

This report applies a monetary value to the range of benefits and services – economic, social and environmental – provided by the Inland Waterways under Waterways Ireland's remit. It is relevant in terms of establishing relevant funding options available to support masterplan proposals. A number of case studies are presented to demonstrate different types of benefits provided by the waterways, and to make the case for ongoing maintenance and investment in the waterways.

It is clear that the benefits provided by the inland waterways to Ireland's economy and the health of its people are significant and wide ranging. The current valuation of the rebuild costs of infrastructure under Waterway Ireland's remit is estimated at €1.2 billion.

Inland waterways cut across policy themes and support a range of government agendas, including:

- rural development and diversification,
- sustainable communities,
- enterprise facilitation,
- housing growth and renewal,
- urban renaissance,
- place-making and place-shaping,
- visitor economy and sustainable tourism,
- sustainable transport,

- physical and mental health and well-being – preventative approaches to healthcare;
- climate change, carbon reduction and environmental sustainability;
- social inclusion and cohesion, and collaboration between landholding state agencies

#### 4.2.2 Waterways Users Research Report (Waterways Ireland, 2017)

The report was based on 1,725 face to face interviews by Waterways Ireland, spread across the waterways and conducted between June to September 2017. Waterways users who participated in the research were predominantly male, between the ages of 35-64. The majority were married and 65% from the ABC1 social class.

Key themes, across all waterways under the management of Waterways Ireland, were:

- The waterways attract a spread of local, domestic and overseas visitors;
- 1 in 5 waterways users are overseas visitors;
- There is high satisfaction with the waterways experience;
- The Shannon and Barrow are our best performing waterways (high satisfaction with waterways experience and water quality);
- Enjoyable and attractive location as well as tranquillity of location and scenic beauty are important to users;
- Overseas visitors spend the most time on waterways and spend the most. The average amount spent by users was €183.30 per person with average spend of €137.80 for domestic visitors and €576.30 for overseas;
- Just 1 in 3 waterways users are aware of Blueway Trails, however a significantly higher percentage of users were aware of the blueway on the Shannon Erne Waterway (63%);
- Of those respondents (583) aware of blueways, the Shannon Blueway paddling section was most visited; and
- Walking is the most popular activity, with 42% of users claiming they walk regularly along the waterway.

This research highlighted that some activities were more popular than others on specific waterways. For the Shannon this is boating, private cruiser/barge and on the Shannon Erne this is boating, private cruiser/barge, boating – boat trip, boating – hire cruiser and angling.

#### 4.2.3 Research on Cruising on the Shannon

Cruise hire on the Shannon is an important niche market in Irish tourism, attracting 18,000 -20,000 visitors each year, who wish to be close to nature while travelling independently along a relatively natural waterway in the heart of Ireland. The estimated annual value of the sector amounts to €50m<sup>3</sup> and this benefit is dependent on a healthy cruise hire industry on the inland waterways.

#### Ireland's Inland Waterways Review & Outlook (IBRA, June 2014)

The Irish Boat Rental Association (IBRA) commissions research pertaining to the inland waterways cruising market.

- The boat rental sector catered to an estimated **14,500 visitors in 2013**, generating an estimated €20m in direct tourist expenditure in some of the least visited areas of the country. The full impact of this tourism expenditure is likely to exceed €40m in economic activity.

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<sup>3</sup> Valuing Ireland's Rural and Urban Inland Waterways (2016). Waterways Ireland.  
<https://www.waterwaysireland.org/about-us/research>

- **The 50% collapse in demand over the past 10 years** reflects changes in operators and a lack of marketing<sup>4</sup>. The loss in tourist expenditure has been upwards of €20 million each year. Simultaneously there has been significant investment in shore facilities and the product hardware is considered to be in good shape.
- **Ireland’s waterways system is reputed to be one of the best and least cruised in Europe**, despite an increase in competitor destinations. Boat rental rates in Ireland are currently (2014) at the same level as in 2007. However, the exclusive experience available on Ireland’s inland waterways has failed to capture the imagination of the potential market in recent years, especially in the top source market in mainland Europe.
- Key stakeholders – operators, distributors and infrastructure providers – are unanimous in citing an **urgent need to redress a marketing deficit**.
- **Shift towards direct bookings** for a sector which up to recent years depended almost exclusively on tour operators to sell the product. Over the past 10 years the sector may have been slow to respond to a changing market environment, and to engage creatively in on-line consumer marketing.
- While marketing is the primary short to medium term challenge, there is also the need to remain **pro-active in ensuring adequate infrastructure and enterprise** supports.

### Cruiser Capacity (2014)

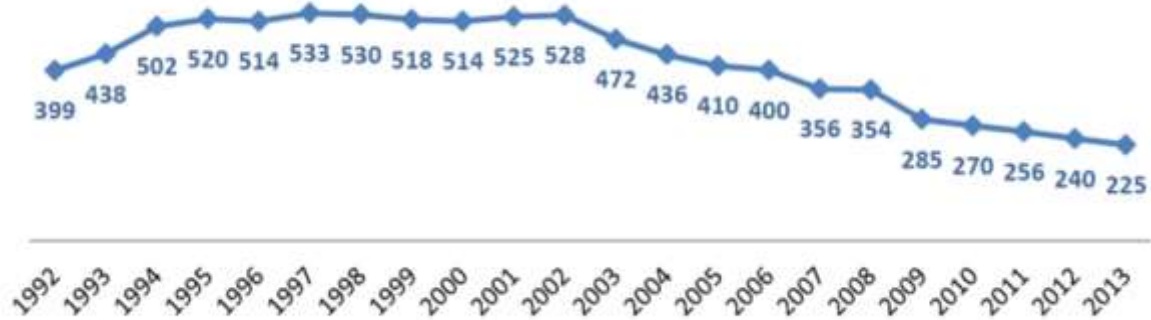
The inland waterways cruise hire sector is facing a very uncertain future. Current capacity is shown in Table 4 and previous trends and overall decline over the longer term shown below. Together these figures show that the industry has suffered a dramatic fall in demand over the past decade which has severely impacted the sustainability of the sector.

The hire fleet has been in continuous decline since 2002, from a peak of over 500 boats in to less than 225 boats by 2013 (Table 4), although the IBRA have provided a more recent figure of 424+ boats in 2018, due to new purchases. Despite consolidation within the sector, from 11 to 6 boat rental companies, dominated by three major companies, the overall downturn in trade has resulted in closures of long-established businesses, job losses, pay cuts and a fall in Exchequer earnings. The knock-on impacts have affected many retail, catering and supply businesses along the waterways. However, there has been a marked pick up since 2014 and the IBRA report steady increase in high-spend demand.

**Table 4 Current Cruiser Capacity**

	12 berth	10 berth	9 berth	8 berth	7 berth	6 berth	5 berth	4 berth	3 berth	2 berth	TOTAL
2018	3	8	5	17	1	64	11	63	14	27	213
2017	4	8	5	13	16	56	11	56	4	31	204

<sup>4</sup> May also reflect the effects of the global financial crisis during this period.



**Boat Rental Fleet 1992-2013 (Source: IBRA, 2014)**

### Boat weeks sold by Market

The cruiser hire industry is a small but important niche market in the context of Irish tourism as they bring genuine tourists, who wish to see the unspoilt countryside and wildlife, to rural areas which do not benefit from general tourism. The Shannon hire industry enjoys a relatively long season of almost 8 months (30 weeks) per annum:

- Almost 14,500 tourists hired a cruiser in 2013
- Almost 3,800 boat rental weeks generated upwards of an estimated €9m in rental income
- 83% of the demand is from out-of-state, with Germany the No.1 source market.
- IBRA members report that almost 120,000 bed nights were sold in 2017-18, over almost 3,800 boat weeks.

More recent data for 2017 and 2018 is shown in Table 5 and Table 6 below indicate that the German and domestic markets are the strongest in terms of recent sales, with tour operators still performing a vital sales route (Table 6).

**Table 5 Boat Weeks Sold by Market (2017-2018)**

	Britain*	Germany	Holland	France	Switzer	Belgium	Austria	Italy	Other EU	Other	N.Ire**	Rep Ire	TOTAL
2018	235	<b>1584</b>	40	91	<b>360</b>	24	232	8	79	116	51	<b>1090</b>	<b>3910</b>
2017	225	<b>1649</b>	48	99	<b>386</b>	26	243	15	64	136	73	<b>977</b>	<b>3941</b>
change	10	<b>-65</b>	-8	-8	<b>-26</b>	-2	-11	-7	15	-20	-22	<b>113</b>	31

**Table 6 Boat Weeks, Sales Platform**

	Total via	Total	Total via
	Tour operators	direct	internet
Boat Weeks	1733	1554	1094

### Visitor Profile for Cruise Hire in Ireland

The German and domestic markets are still the strongest in terms of recent sales for both bed nights and boat weeks (Table 7)

Cruise visitors tend to be an older (+45 years) cohort and are high-spending relative to the average tourist, at €200 per head per day. The industry is actively facilitating arrivals at Dublin Airport by providing shuttle transfers for visitors to pick up their hire boat on the Shannon.

In terms of total sales, tour operators perform a key role (40%), with the Internet (35%) and direct sales (25%) also providing vital outlets to market. With both overseas and domestic markets predicted to grow, there are considerable opportunities to develop on the water cruise experiences as a main attraction in the region.

**Table 7 Number of Visitors by Market Area**

	Britain*	Germany	Holland	France	Switzerland	Belgium	Austria	Italy	Other EU	Other	N.Ire**	Rep. Ire	TOTAL
2018	970	6,222	110	390	1,491	115	1,023	48	377	545	306	5517	17,114
2017	1,040	6314	152	428	1623	128	1049	79	323	598	360	5415	17509
	-70	-92	-42	-38	-132	-13	-26	-31	54	-53	-54	102	-395



### Visitor Attitudes to the Irish Cruise Hire Experience

The *Shannon Erne Waterway Boaters Welcome Scheme* (May 2008) report observed the following visitor attitudes.

- The main purpose of the holiday was to relax and get away, experience cultural and outdoor activities; meeting locals and other new people featured strongly.
- High levels of satisfaction with most onshore facilities in general, but lack of information relating to BBQ and picnic facilities, evening entertainment, information provided at the stops, facilities for children and basic facilities such as electrical points and laundry.
- Visitors felt that more walks along the rivers and lakes are required.

*What is good about the Experience?*

- Wonderful scenery along a largely undeveloped waterway
- Easy navigation, the waterway is free of commercial traffic
- Friendly people.

These observations date from 2008 and there is a lack of recent research on visitor attitudes to the inland cruising experience, particularly on the Shannon Navigation. Although the proposals in this masterplan are not informed by recent primary visitor surveys, they are based on several credible information sources including experts that have significant knowledge of the waterway and the cruise hire industry.

### Key Attributes of Competitor Cruise Destinations

It is useful to compare the Irish cruiser industry with competitor destinations. Since the Irish cruise hire product was originally developed decades ago, new destinations have come to market and strengthened their positions. Some insights into their product offering is provided Table 8) below.

**Table 8 Summary Features of Competitor Cruise Destinations**

<b>French Canals</b> <i>(esp. Canal Du Midi)</i>	<ul style="list-style-type: none"> <li>• Enjoys a longer season due to better weather.</li> <li>• Commands a higher rate, so boats are replaced more frequently.</li> <li>• Food and wine offer along the navigation is also extremely good.</li> <li>• Easy access for the larger markets such as Germany - can drive by car.</li> </ul>
<b>East Germany</b>	<ul style="list-style-type: none"> <li>• Convenience for the (west) German market, within short drive and the destination will feel familiar. Beautiful scenery and easy navigation, with young and modern fleet.</li> <li>• Can get crowded, while the food offer has been described as limited.</li> </ul>
<b>Netherlands</b>	<ul style="list-style-type: none"> <li>• Very good boats and plenty of attractive places to stop to eat.</li> <li>• Largely commercial waterway can be daunting. Easy access for Germans (particularly from the North).</li> </ul>
<b>UK</b>	<ul style="list-style-type: none"> <li>• Norfolk Broads - suffered like the Shannon from an ageing fleet and discounting of prices. Recent progress with new boats and pick-up in business.</li> <li>• Almost exclusively a UK customer base, with 20 million people in London a short drive away.</li> <li>• River Thames, top end of the market, but few boats for hire on iconic waterway. Oxford, Windsor, Henley - all attractive to international traveller. Waterside real-estate prices put many boat hire companies off the water so a niche product.</li> <li>• Lough Erne - Spectacular scenery, excellent infrastructure, many places to moor; food and drink limited.</li> </ul>
<b>Northern Ireland</b>	
<b>Italy</b>	<ul style="list-style-type: none"> <li>• Venice Lagoon: restricted navigation, with no access to the Grand Canal.</li> <li>• Italian Lakes: controlled by private operators, without the self-drive experience of the Shannon.</li> </ul>

See Chapter 5.0 below for a more detailed review of comparable international ‘water-based’ destinations.

### 4.3 Shannon Region: Visitor Numbers and Type

The regional brand of *Ireland's Hidden Heartlands* is starting from a low base in terms of visitor numbers (210,000, of which 91,000 are holiday makers, 2017). Total spend is estimated at is €93 million (€32m by holidaymakers). The IHH region attracts 336,000 domestic trips annually, for a spend of €50 million. Low numbers, as well as lack of area-specific metrics, also hinder the collection of data.

The IHH region has just a % share of overnight stays by overseas visitors to Ireland and a 3% share of overnight stays by domestic visitors. Data is collected by Fáilte Ireland on an ongoing basis in terms of overall tourism numbers and spend, but detailed information on visitor numbers and type is unavailable for the Shannon Region / Masterplan area.

Figures relating to trips and spend for overseas and domestic visitors according to region show that the Midlands followed by the Border region have a weaker overall performance in the tourism sector of the economy. All counties along the Shannon perform relatively weaker, with the exception of Clare, Galway and Limerick, where the tourist focus is along the Wild Atlantic Way and Shannon Estuary.

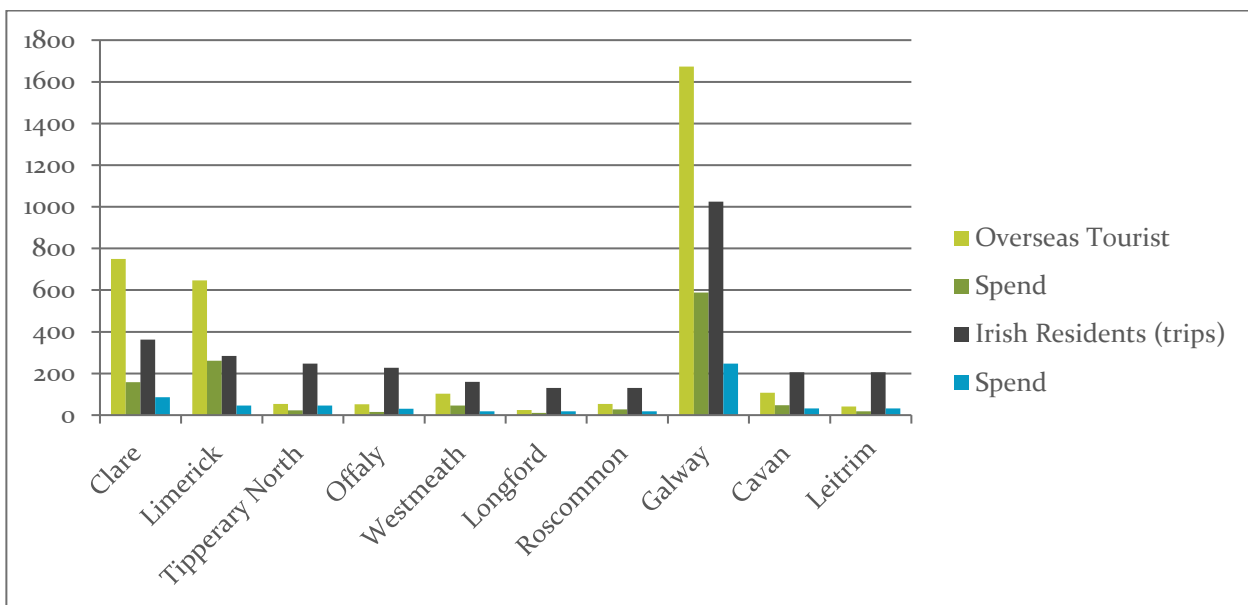
**Table 9 Topline Performance by Region, 2017 (Fáilte Ireland)**

	Overseas Tourist	Spend €	Irish Residents (trips)	Spend €
<b>Ireland</b>	9 million	4.9 billion	9.6 million	1.9 billion
<b>Midlands (region)</b>	218,000	85 m	422,000	71 million
<b>Midwest (region)</b>	1.4m	444m	879,000	162m
<b>West (region)</b>	1.9m	694m	1.6m	353m
<b>Border (region)</b>	746,000	271m	1m	141m

**Table 10 Topline Performance by County, 2017 (Fáilte Ireland)**

	Overseas Tourist (000)	Spend € (mill)	Irish Residents (trips)	Spend € (mill)
<b>Clare</b>	749	158	362	86
<b>Limerick</b>	647	261	284	46
<b>Tipperary North</b>	53	23	248	46
<b>Offaly</b>	52	16	228	30
<b>Westmeath</b>	103	46	159	18

	Overseas Tourist (000)	Spend € (mill)	Irish Residents (trips)	Spend € (mill)
<b>Longford</b>	24	10	130	18
<b>Roscommon</b>	54	27	130	18
<b>Galway</b>	1,673	589	1,024	247
<b>Cavan<sup>5</sup></b>	107	48	206	32
<b>Leitrim<sup>6</sup></b>	41	18	206	32



**Figure 5 Topline Performance by County, 2017 (Fáilte Ireland)**

<sup>5</sup> Cavan and Leitrim as per CSO data. The CSO publishes combined figures for counties where the sample size is insufficient to produce a robust result.

<sup>6</sup> Cavan and Leitrim as per CSO data. The CSO publishes combined figures for counties where the sample size is insufficient to produce a robust result.

## 4.4 Access and Linkages

There are overarching issues to do with access and linkages (to and within) the Masterplan area. Key metrics include:

- 80% of all visitors arrive in Ireland through Dublin airport;
- Less than 50% of overseas visitors have access to a car; and
- 17% of overseas visitors join tours as a means of accessing key attractions and facilities during their visit. Highly structured touring agendas and tight margins mean that there is reluctance on behalf of the operator to stay longer or indeed deviate from the main attraction

In general, access needs to be improved via airports and alignment of train/ bus schedules with tourism experiences, especially relevant to rural heartlands. With reference to boat users, there is the opportunity to enhance and shorten the transfer time from Dublin airport to the Shannon (delays for coach transfers from Dublin, although this is circumvented by cruise hire companies offering direct 'pick-up' at Dublin Airport).

Destination Management Companies (DMCs) are critical in terms of getting groups to Ireland (business and leisure/ niche interests). They offer bespoke offerings and experiences, with all-in incentivised 5\* packaging.

As well as providing a motivation stop i.e. destination/ attraction there is also a need to develop an integrated approach in relation to services, transport, accommodation and activities. In order to add attractions to an already tight itinerary, there needs to be a motivation to stop in the Midlands.

Access onto the water and alongside the water is also difficult in most places (particularly in the Mid-Shannon, due to the geography and flood plains). According to the Irish Boat Rental Association (IBRA), there are currently only three principal places along the Shannon navigation where a visitor can hire a cruise boat (Carrick-on-Shannon leads this provision, with Banagher and Portumna in the south).

In terms of the limitations in accessing the shoreline, there are ways that this could be improved;

- Nominating key viewing points and identifying other opportunities to improving the visual links between the shore and water;
- Improving the physical and visual links between on shore facilities such as marinas and moorings and the towns and villages in which they are located; and
- Coordinating the use of public lands, as identified in the Outdoor Recreation Plan (Section 3.3 above), to provide access to the shore and viewing points, which could be bundled with looped or linear walks/ cycles to allow for a continuation of existing trails.

### 4.4.1 Public Transport

80% of visitors arrive in Ireland through Dublin airport and less than 50% of overseas visitors having access to a car there is clear requirement to improve access to the region public transport.

Taking each mode of access in turn the masterplan will address road access, rail and other public transport availability within the region in relation to the four key markets as well as the domestic market. The outcome of this analysis will be integrated into the Masterplan proposals and embedded within the theme of the 'Shannon routes, crossings' and aligned with proposals.



with  
via

#### 4.4.2 Crossing Points / Key Settlements

In the context of access to the Shannon, in addition to improved north-south links, the Masterplan will consider east-west crossing points which are strategically important. Masterplan interventions will be designed to encourage the visitor to stop.

There is a clear need for improve the placemaking agenda at some locations e.g. Tarmonbarry being a good example. Proposals will be prioritised according to accessibility (highest first), tourism potential and need. Table 11 below also lists water facilities in accordance with key settlements. This list is not exhaustive, but it should be noted that currently only 3 places on the Shannon navigation now offer cruiser hire (Carrick-on-Shannon is the “capital”; with Banagher and Portumna in the south). This is at odds with wider strategic importance of key service settlements in other parts of the Shannon such as Athlone and Killaloe / Ballina.

Service blocks are also provided by the Local Authorities and by Waterways Ireland along the navigation and are also listed in Table 11.

**Table 11 Key Settlements, Access and Facilities**

Settlement	Access Via / Crossing Points	On Water Facilities	Service Blocks
<b>Athlone</b>	M4 / Rail	Mooring, Boat trips	Toilets, showers, pump-out and slipway.
<b>Killaloe/ Ballina</b>	6k from M7 / 5km from Birdhill	Watersport, Boat Trips	Ballina: Toilets, shower and slipway Killaloe: Toilets, Showers, Pump-out, and shore Power
<b>Carrick-on-Shannon</b>	N4	Mooring, Cruiser, Barge and Day Boat Hire, Watersports, Cycle Hire, Boat Trips	Toilets, showers, laundry, pump-out, slipway and shore power.
<b>Tarmonbarry</b>	Royal Canal / N5	Mooring	Toilets
<b>Portumna</b>	N65	Mooring, Cruiser, Barge and Day Boat Hire, Cycle Hire, Watersports,	Toilets, showers, pump-out and shore power.
<b>Lanesborough</b>	R392	Mooring	Toilets and showers.
<b>Banagher</b>	R439	Mooring, Boat trips, Cruiser, Barge and Day Boat Hire,	Toilets, showers, pump-out and slipway.
<b>Shannonbridge</b>	Grand Canal / R444	Mooring	Toilets, showers, pump-out, slipway and shore power.

### 4.4.3 Marina, Berthing & Shoreside Facilities

The availability and quality of berthage and marinas underpin the cruise hire offering and experience. There are 4,500 berthing spaces across 58 locations along the waterway, which act as the interface between water and land. With over 8,400 boats on the navigation (most in private ownership), it appears that the demand for mooring would outweigh supply; however, there are variations across the navigation in the levels of demand.

Lock passage data provides useful information about usage patterns to gauge activity along the navigation<sup>77</sup>. Data for the total number of lock passages between 2014 and 2018 imply an increase in total activity (see Figure 6) over the period.

Figure 6 Total Number of Lock Passages (2014-2018)



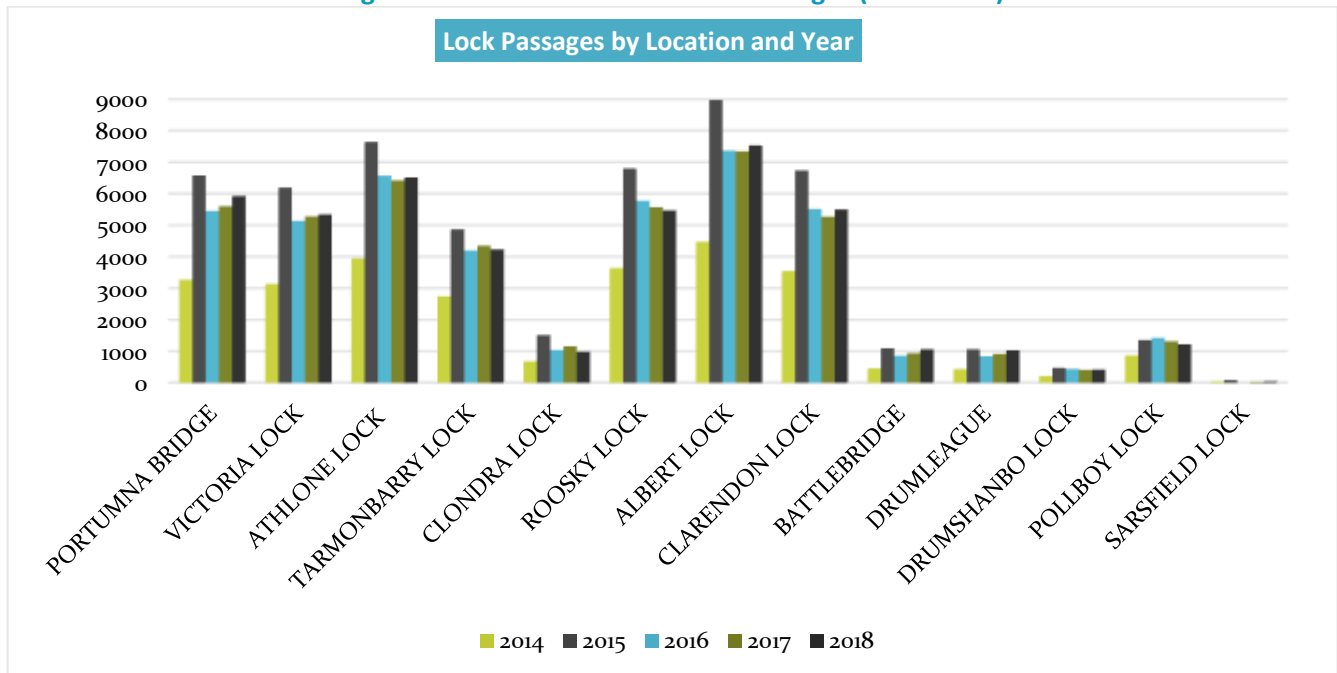
Data for each of the 13 lock passages are presented in Figure 7.

The Albert Lock is the most frequented, followed by Athlone, Roosky and Clarendon Locks, respectively.

The least active locks are Sarsfield, Drumshanbo, Drumleague, Battlebridge, Clondra and Pollboy Locks, respectively.

<sup>77</sup> It should be noted that the figures do not record total waterways usage (e.g. single lake based) as activities that did not involve a passage through a lock or Portumna Bridge, are not recorded.

Figure 7 Data for each of 13 Lock Passages (2014-2018)



This suggests that outliers including the three locks leading to Lough Allen; Pollboy leading to Ballinasloe; the Limerick sea-lock (Sarsfield); and Clondara leading to the Royal Canal have significantly lower levels of activity. The busiest, Albert Lock, is located between Dromod and Carrick-on-Shannon. Carrick is the main hub for the cruise hire industry. Berths can be scarce in this area particularly around peak season.

Further resources or statutory powers dedicated to addressing congestion around marinas in the more popular areas may be required to address the potentially negative impacts on visitor experience.

Along the Shannon Navigation only three locations (Drumshanbo, Carrick on Shannon and Athlone) provide access to full services (showers, laundry, pump-out, refuse, toilet and fresh water).

Along the Shannon Erne Waterway, four locations have full services: Ballinamore Marina, Haughton’s Shore, Ballyconnell Bridge and Aghalane. These services include showers, toilets and laundry facilities. Only Haughton’s Shore and Belturbet have pump out facilities. Full services should be available at all hubs.

### Conclusions

- There are ‘pinch-points’ at key locks /locations on the Shannon, which require redress through increased berthage and marina spaces to avoid congestion – these include the Albert, Athlone, Roosky and Clarendon Locks, respectively.
- The least active locks are: Sarsfield, Drumshanbo, Drumleague, Battlebridge, Clondara and Pollboy Locks, respectively. With improved integration of on-water cruising, kayaking and canoeing, and off-water walking/ cycling visitor offering for Lough Allen, the Shannon Uplands and Shannon Erne Waterway, the visitor experience would be enhanced.
- With increased inter-linkage of the Royal and Grand canals greenways/ blueways with the Shannon, activity at these locks may increase.
- Further resources are required to address congestion around more popular marinas to avert potentially negative impacts on the total visitor experience.

## 4.5 Outdoor Activities

*Getting Active in Ireland's Ancient East, A Toolkit for Activity Providers*<sup>8</sup>, provides some useful guidance in terms of developing visitor experiences for activity providers. Notwithstanding the reference to Ireland's Ancient East, the toolkit can be of use to guide activity operators in the area. The objective for providers should be to provide engaging, immersive experiences that are memorable. To do this, visitor experiences must

- be authentic – true to place;
- be hands-on – with opportunities to learn and do;
- stimulate the senses – not just sights, but sounds, smells, tastes and textures too;
- connect – the visitor to the place, to the local community, and perhaps to other like-minded visitors;
- inspire – can provide a personal sense of achievement and open up new horizons; and
- feel special – is not widely available, mainstream or mass market.

Activities provide a strong supporting role in attracting visitors to Ireland. Data is gathered by FI in relation to activities on a national level in relation to all markets, however being 'active in the landscape' is first and foremost the primary focus for visitors.

Walking has increased exponentially as an outdoor activity for all ages and abilities; however, people are motivated to be 'in the landscape' vs the activity itself. In terms of walking, looped walks near the water (<5km) versus linear tend to be the most attractive to overseas visitors. Cycling is a limited yet growing activity and only 2% of international visitors to Ireland as a whole come for angling (this is likely to be higher in GB market in the Midlands, linked to VFR returns).

In relation to water sports, domestic visitors (19%) are much more likely to take part in activity as overseas visitors (3%) are unlikely to bring gear and equipment and prefer to be beside or on the water but not necessarily taking part in water-based activities. Blueways is a niche concept, and data gathering within FI does not drill down to that level. However, a report prepared titled *Strategic Marketing, Blueway Research February 2016* prepared on behalf of Fáilte Ireland identified the potential visitor market for a Blueway – adults who would "definitely" or "possibly" be interested in using a Blueway and would consider Ireland for a holiday or short break. This research identified significant potential markets for a Blueway product.

- Britain 19.4 million
- France 16.3 million (particularly northern France)
- Germany 37 million

**To attract such potential visitors the key requirements are a mix of land- and water-based activities along with a rich opportunity to experience Ireland's culture, music, history and hospitality, particularly in landscapes unique to Ireland and in sheltered waters.**

There is a significant array of outdoor 'active in nature' activities already available on the Shannon, but these are not marketed in combination to any significant degree (see Figure 8 overleaf).

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<sup>8</sup> Fáilte Ireland, (2018)

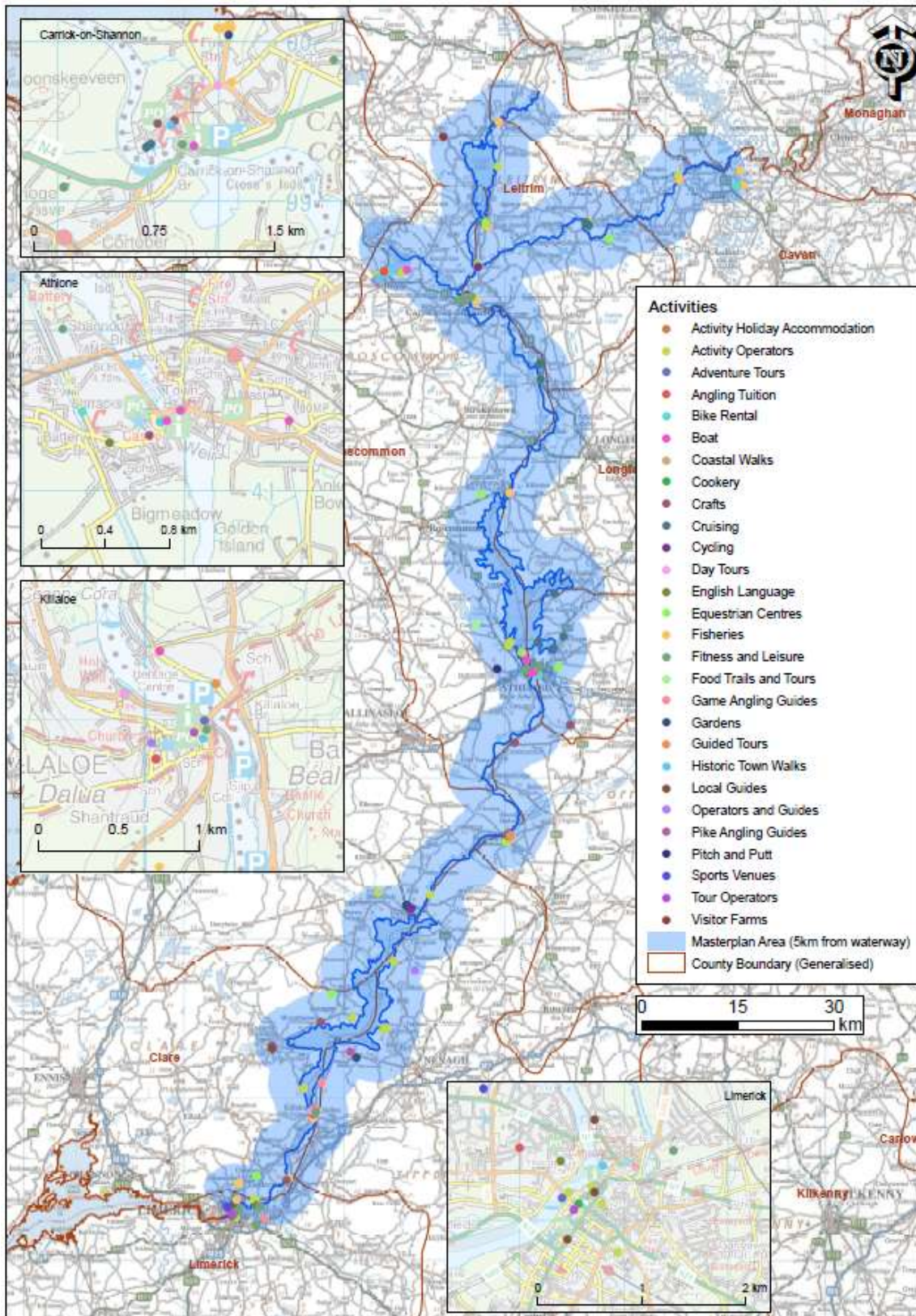


Figure 8 Map of Outdoor Activities in Shannon Region (2017)

### 4.5.1 Walking

In 2014, 73% of all users of the waterways were there to walk or cycle. Walking is the most widely undertaken activity on the waterways and shows increased participation by users between 2010 and 2014 (from 62% to 67%). The *Waterways Users Research Report, 2017* (see Section 4.2.2) also reports that walking is the most popular activity, with 42% of users claiming they walk regularly along the waterway

Fáilte Ireland research suggests that walking is an increasingly popular activity with the more popular walks tend to be short circular loops ranging from 5km to 10km as well as themed trails (e.g. historical, spiritual etc.). Walkers tend to be middle aged, affluent and discerning and stay longer than typical visitors – an average of 16.1 nights. Walking features strongly within the top four international markets.

### 4.5.2 Cruising Activity on the Shannon

Boat and cruiser hire predominantly attracts the domestic, German and French. Data on cruising on the waterways are not gathered routinely by Fáilte Ireland. However, trends in growth or demand are available from IBRA, with over 18,000 visitors taking a cruise on the Shannon in 2017, for over 136,000 bed-night equivalent (see Section 4.2.3). Although the German market has seen a decline since the 1990s, it has consistently provided the highest (>50%) and repeat overseas market demand for Shannon cruising.

#### Profile of the Cruise Hire Industry

The hire boat industry provides vital transport and mobile accommodation on the Shannon and has a unique capacity to spread tourism into rural areas. From a peak almost 20 years ago, there has been very significant consolidation of the national cruise hire fleet over the past decade, where three (1, 2, 3 in Table 12 below) principal boat hire companies are in operation in 2019, all members of the Irish Boat Rentals Association (IBRA). Three smaller companies operate in the upper reaches of the Shannon (4, 5, 6 in Table 12).

**Table 12 Cruise Boat Hire Companies operating on the Shannon (2019)**

	Boat Hire Company	Geographic Base(s)
1	Le Boat	Based at Carrick-on-Shannon, incorporating: <ul style="list-style-type: none"> <li>• Emerald Star: with bases at Portumna, Carrick-on-Shannon</li> </ul>
2	Locaboat	Based at Quigley’s Point, Ballinamore, Ballinasloe, incorporating <ul style="list-style-type: none"> <li>• Carrickcraft: with bases at Carrick-on-Shannon, Banagher</li> <li>• Waveline: with base at Banagher</li> </ul>
3	Silverline	Based in Banagher
4	Pleasure Cruisers	Rooskey
5	Lough Key Boats	Lough Key
6	Aghinver Limited	Belturbet, Shannon Erne Waterway, Lough Erne

#### Key Issues for the Shannon Cruiser Industry

A number of key issues emerged from discussions with the Irish Boat Rental Association (IBRA). Three member companies currently in the IBRA dominate the market in the Republic of Ireland (RoI), down from about 8-9 companies twenty years ago. The Erne Charter Boat Association (ECBA) represents the three companies in Fermanagh (Erne system).

- International investment companies have recently acquired the majority of the Irish cruise hire fleet. Their long-term strategic plans are unclear. Silverline (Banagher) provide one of the best overall fleets in Ireland (see: [www.silverlinecruisers.com](http://www.silverlinecruisers.com)).



*Le Boat at Carrick on Shannon (2018) – French company which acquired Emerald Star Lines*

- Some headline statistics for cruiser hire:- 3,800 boat weeks (2017); about 18,000 visitors; 160,000 bed nights pa; spend of €200 per person per day. The overall worth to the Irish economy is €22million pa. Hire fleet size is c. 424 hire boats (2018) with about 6,000 private craft on the navigation (many of the latter never leave the harbour).
- The centre of gravity for the cruise hire fleet is clearly in Carrick-on-Shannon.
- The core proposition is strong and will likely remain so over the coming decade. The fleet size has shrunk over the last generation, but the quality of the boats and their carrying capacity has increased in line with market demands.
- Royal Canal has potential to develop from a cruise hire perspective.
- More flexibility in relation to packaging up waterway holidays is essential e.g. flotilla holidays and themed guided holidays like birdwatching, history/culture/heritage, English language training, food tours or health and wellness packages both on and adjacent to the water.
- The islands should be energised, particularly in relation to the internationally significant early Christian heritage;
- Considerable discussion is ongoing about the need for public sector support of the cruiser sector. Structural obstacles exist. The fact that significant funding of the NI fleet on the Erne exists, while the Irish (Shannon) fleet has not received public funding for over a decade, creating unfair competition in the market. e.g. the Erne boats are replaced every 10yrs or so, while cruise boats remain on the Shannon for double that time.
- Basic boat building skills have now virtually disappeared from the Shannon. Could this tradition be resurrected?). The sector needs a scheme for certified apprenticeships to build national skills base and ensure the future supply of indigenous boats
- Virtually all boats are different thus requiring specialist refurbishing skills (e.g. different fibreglass moulds etc).
- IBRA members offer additional activities, such as bikes which come with the package.

### **The Future of the Shannon Cruise Fleet: Challenges & Opportunities**

The future of the Shannon boating experience requires a healthily functioning cruise hire industry. However, the latter faces considerable challenges in relation to:

- (i) the age of the fleet;
- (ii) operational costs;

- (iii) capital costs of replacement; and
- (iv) the need to adapt to the greening requirements of the future, linked to the sustainability ethos of the Shannon proposition.

These issues require careful consideration to ensure that the cruise hire experience remains a central element of the integrated Shannon offering.

#### *Financing Options for renewed Fleet*

Shannon hire boats must be robust, well fitted out, simple to operate and maintain, and safe for a typical visitor to use. The traditional UK suppliers of the typical 'Shannon craft' moulds are no longer in business. Due to merger and acquisition by major European manufacturers, there are only a small number of specialist boat builders remaining, with limited production capacity. Sourcing of a suitable manufacturer(s) to produce 112 craft (half of the current fleet over five years) would be challenging as most of the major European production companies are at full capacity with their own ranges of boats, with a 2-year waiting list. Thus, the major companies have bought out other production facilities to build their standard ranges, so commissioning boats that are compatible with the needs of the Shannon hire cruise operations<sup>9</sup> would be challenging.

#### *Greening the Fleet*

To rejuvenate and provide a modern fit-for-purpose 'green' hire fleet, a radical new approach may be considered in the context of the strategic priorities of the Shannon Tourism Masterplan, particularly in terms of environmental protection. Currently, the engines in the hire cruise fleet are diesel powered, although some of the newer boats have hybrid diesel-electric engines.

Efficiencies can be made in the design of a boat's hull<sup>10</sup>, but reducing the wetted hull surface also decreases the stability of the boat. Hire cruisers are not intended as speed boats but more as robust, slow moving and safe vessels on which to enjoy a holiday on the Shannon.

New technologies for hybrid and electric powered boats are being developed apace<sup>11</sup>. Electric river boats have been around for decades, with charging points along the quays. A standard cruise hire boat would typically require a battery charged for 6-8 hours running per day, with 3-6 hours of light at night, depending on time of year. Standard lithium batteries are potentially a fire hazard and are generally not considered suitable for boats. The key hurdles to achieving the 'greening' agenda are reliability, safety and cost.

The market for electric watercraft, both commercial and recreational, is increasing, but pure electric boats (electric motor powered by one or more battery packs) are regarded as best suited to small and medium craft. Although expensive, pure electric outboard motors will become more affordable, as more energy harvesting to charge batteries will be available on e-craft, thus improving range. However, Irish solar capacity may be insufficient to do this.

Of a range of hybrid/electric boat manufacturers<sup>12</sup>, only the Greenline 4-berth model is currently considered by IBRA as a potential 'green' Shannon hire boat supplier, due to its design, efficiencies and facilities, but they are

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<sup>9</sup> The IBRA estimates that a minimum order to a major production company would need to be in the range of 80 to 100 boats, with challenges in selecting a suitable replacement boat design. Delivery times are likely to be in the order of 2 years.

<sup>10</sup> The 'wetted surface' reduces the amount of hull in the water, thus producing less resistance, with more efficiency from the engine powering the boat. The power conversion of an electric motor to a revolving propeller is considered to have an 87% efficiency rating, while a diesel engine achieves 97% efficiency.

<sup>11</sup> <https://cleantechnica.com/2017/01/12/e-boats-anyone-electric-boat-market-reach-20b-2027-according-new-study/>

<sup>12</sup> e.g. Azimut Magellano, Greenline, Island Pilot and Planet Solo

expensive and may be unstable due to large battery banks, and/or difficult to manage due to different hybrid power options.

### Conclusions:

The concept of having an all-electric boat fleet is currently considered to be non-viable on the Shannon due to:

- the inherent design of Shannon cruise boats may not be amenable to incorporation of green design;
- battery technologies for boats are at too early a stage to take the (economic) risk of change-over; and
- lack of electric recharging facilities along more remote areas of the Shannon may cause local recharge problems, although this could be overcome through the masterplan’s e-charging point strategy.

These issues may be resolved technologically with time, but in 2019, there is no clear ‘green’ option available to green the Shannon fleet. An in-depth techno-economic study is required by a boating / navigational expert.

### Rejuvenation of the Cruise Hire Fleet:

The rejuvenation of the Shannon cruise hire fleet is clearly not a straightforward task. A detailed feasibility study is required to examine:

- ✓ Practical design and scheduling of replacement with a major boat manufacturer(s);
  - the most appropriate green technology solutions suited to the Shannon, considering batteries, solar capacity and potential hybrid technologies;
  - specifications for optimal, high quality, green boat designs for a replacement fleet;
- ✓ Examination of replacement costs;
- ✓ Estimation of manufacturing capacity and scheduling, with a major boat manufacturer(s);
- ✓ Examination of financing options (see Section 9.2 below);
- ✓ Legal and fiscal requirements to structure a phased replacement of the fleet over 5-10 years;
- ✓ Delivery of clear recommendations for phased replacement of the fleet within the timeframe of the Masterplan (2020 – 2030) working with industry and key partners on the waterways.

## 4.5.3 Other Boating Activities on the Shannon

### Options for Day Boating on the Shannon

The idea of reconfiguring decommissioned craft as day-boats for hire was considered as part of the research. The objective would be to provide safe and cost-effective access onto the water for a fun-seeking, younger market, for short day-hire or weekend periods. This concept could work like a ‘Dublin Bike’ scheme, whereby a boat could be hired at Point A and returned there, or dropped off at Point B for collection, allowing the visitor to carry on by e.g. bicycle to explore another part of the Shannon region. The boat company would collect the vessels and bring them back to a hire base.

This would require a number of hire bases dotted along the Shannon, allowing visitors to ‘leapfrog’ if they so wished, along the waterway. This would require a significant level of management and redistribution of boats each evening to ensure there were sufficient boats at each hire centre. The key criteria in considering the business viability for such a concept are presented below (Table 13):

**Table 13 Criteria for Consideration of Day-Boat Hire**

Key Criteria	Core Elements for Consideration	Comment
Type, quality & style of craft	<ul style="list-style-type: none"> <li>• Cost of conventional small cruiser €60-70,000</li> <li>• Could consider cheaper / reconditioned small cruise boat, possibly driven by solar power, but is a fledging concept and</li> </ul>	Capital investment likely too high to make a return on

	conventional engines are still the norm.	investment
<b>Key locations (positioning)</b>	Potential to establish a number of bases; with significant infrastructural overheads: berthage, office, manpower.	Costly to establish bases
<b>Safety &amp; Insurance</b>	<ul style="list-style-type: none"> <li>Insurance claim culture is of concern to all boat operators.</li> <li>Likely result in prohibitive insurance costs to the operator.</li> <li>On-water risks are high and operators worry about genuine accidental serious injury or death.</li> </ul>	Shannon Navigation and Dept of Marine would possibly seek onerous safety requirements.
<b>Ease of transfer of craft back to base</b>	<ul style="list-style-type: none"> <li>Craft cannot be simply transported back to base like bicycles, with logistical challenges during weather events.</li> </ul>	Day to day economics may not add up – would require detailed economic modelling.
<b>Crewing and related management</b>	<ul style="list-style-type: none"> <li>With up to say three hire locations, maintenance and staff would be required, at least on a seasonal basis.</li> </ul>	
<b>Climate</b>	<ul style="list-style-type: none"> <li>Climate so unpredictable, clients are not likely to use during poor weather/ seasonal only.</li> </ul>	
<b>Riverside villages</b>	<ul style="list-style-type: none"> <li>Many villages on the Shannon are currently considered by the industry to be ‘mediocre’ in comparison to UK or European waterside villages.</li> <li>The public realm and visitor services require to be significantly enhanced to entice visitors to stay longer.</li> </ul>	<i>Note:</i> A Strategic Initiative of the Shannon Masterplan is to develop Destination Towns of the highest quality with significantly enhanced public realm and waterside amenities.

Following discussion of the issues raised, and given current visitor numbers, this option for a day boat hire experience is not considered to be commercially viable by the industry at this point in time.

### Riverboat / Passenger Cruises

Cruising in a passenger vessel is an attractive proposition, popular across Europe, along the Rhine, Danube, Seine and other major rivers. This was considered with the trade as an option to provide scheduled visitor servicing along the River Shannon, allowing people to move more freely up and down the waterway.

However, given the significant capital investment required and the low visitor base at present, coupled with modest growth targets, it is considered by the industry that this option would likely require some level of subsidy, to justify future investment (see Section 9.3 below for financing options).

### Multi-Day Passenger Cruising

There is currently a niche market for luxury hotel cruising experiences on the Shannon, represented by the MV Shannon Princess. This accommodates up to ten guests for multi-day tailored cruise packages, offering classic, golf and walking themed cruises, plying the Shannon waters between Athlone and Killaloe.



MV Shannon Princess

There is potential scope to expand this offering as a high-end, high value experience, linked to onshore attractions, activities and exploration of the hinterland of the Shannon discovery zones.

#### 4.5.4 Angling

The recently prepared Angling Tourism Marketing Strategy for IFI (2019) highlighted some key facts in relation to the industry in Ireland:

- 135,000 international visitors participated in angling in 2017 (Fáilte Ireland, CSO);
- Recreational Angling in Ireland attracts over 400,000 participants, contributes €800m pa and accounts for over 11,000 jobs (ESRI 2016);
- Tourism Angling spend is estimated at €280m per annum;
- Angling is the 6<sup>th</sup> biggest sport in the UK;
- Overseas anglers stay longer, are repeat visitors and spend more than the average visitor, contribute to regional distribution and will travel in shoulder and off season.

The unique appeal of angling in Ireland includes the availability of wild fish of a variety of species, areas of outstanding natural beauty, expert guides and convivial hospitality.



Fishing experiences have the potential to strongly support the Shannon's leading tourism propositions. In particular, coarse and pike angling experiences could be a key part of the 'on-water' adventure proposition of Shannon. If this were bundled with land and water-based activities, and experiences for accompanying families and non-specialists, the proposition could be widened.

#### Sustainability of Angling

There is definite potential for the industry to complement the tourism strategy for the Shannon; however, the sustainability of fish stocks and fishing practices need to be considered. Species such as salmon and trout continue to decline due to complex environmental issues. Conservation and sustainable management practices will be required to support angling and tourism.

The IFI, ESB and many angling clubs along the Shannon have also been in discussions about projects to conserve habitats and stocks; removal of barriers to fish migration; as well as the provision of infrastructure and equipment to allow for improved access to angling. Initiatives aimed at attracting increased young anglers and international tourist anglers are part of the mix. These should be advanced as appropriate, taking cognisance of ecological best practice, as well as environmental and planning frameworks.

Angling clubs up and down the Shannon have been instrumental in adoption of practical biosecurity measures such as rigorous boat defouling and cleansing; non-transfer of boats from one water body to the next etc, but these need to be standardised through the proposed Shannon Code of Practice (see Figure 12 above).

Biosecurity facilities should be emplaced at key entry points to the Shannon to ensure compliance of visiting anglers who may not be familiar with the issues.

### Promotion of Angling to Wider Audience

In terms of better promotion, angling is perceived to attract an aging, male cohort; there is a need to appeal to younger anglers and families, through 'natural Shannon' packages that emphasise:

- Learning a new skill, experiencing nature and bonding with family;
- A unique fishing experience, where fishing counts but culture, history and warm welcome win;
- Combine angling with other leisure activities, such as family walks, picnics and cycling.

Of particular relevance to the Shannon is the development of angling hubs with a critical stock of tourism assets, angling resources and committed communities. These need to be identified in partnership with IFI and other key agencies, with bespoke development plans and supports aligned to deliver improved all-round experiences.

Additionally, the role of angling *competitions* is a key component in the promotion of angling destinations, attracting international visitors and building reputation. It is also considered as a means of engaging younger anglers (see Section 4.8 below for discussion of festivals).

### The Future for Angling

- Identify angling hubs in association with WWI/ IFI and FI/
- That the IFI, with the ESB, angling clubs and other managers along the Shannon, work to overcome barriers to the ongoing conservation and sustainable management of the fishery.
- Development more localised (entry level) angling instruction e.g. half day class for mainstream visitors, delivered through a network of tackle shops around the Shannon region.

## 4.5.5 Activity Providers on the Shannon

The current opportunities for outdoor activities, recreation, wellness and related services such as niche foods, drinks and events were assessed along the Shannon and Shannon Erne Waterway corridor. There is a very substantial enterprise base, mainly small to medium sized companies, providing angling, cycling, walking, hiking, cruising, boating, yoga, spa treatments and activity zones in place.

Additionally, there is an array of food emporiums, local markets, cafés and waterside traditional pubs, offering an authentic expression of rural Ireland's evolving food and drinks, music and entertainment culture.

A sample of these enterprises includes (see [Table 14](#) below):

- 14 cruising/ boat hire facilities; including the three principal cruise hire operators;
- 40+ activity operators offering water-based canoeing/ kayaking, paddle-boarding, water skiing, yachting, rowing, aqua splashing and kids' activities, as well as archery, hiking, cycling, Segway and birdwatching, available along the navigation;
- Up to 15 listed angling guides, boat hire and ghillies operating on the Shannon and its tributaries, as well as the main lakes and mosaic of smaller lakes in Cavan, Westmeath and Leitrim;
- 7 cycling / bike hire centres servicing up to seven waymarked, linear and looped cycles routes;
- 7-10 walking guides servicing up to 37 short, looped and linear walking trails from hill walks to lowland peatways, suited to all ages and abilities;
- Up to 100 local cafés, food markets, traditional pubs and small restaurants offering excellent produce, as well as distilleries and niche craft producers; and
- Up to 6 spa/ wellness centres, with others developing.

These combine to offer a significant base on which to build the future potential of Destination Shannon. However, there are local gaps which will require to be filled to provide a geographical balance.

The activities are supplemented by more than 25 major attractions, ranging from Boyle Abbey and Arigna Mining Experience in the north, through Athlone Castle, Luan Gallery and Birr Castle & Observatory in the mid-zone, and south to Nenagh Castle, Ardnacrusha, St John's Castle and Hunt Museum in Limerick.

**Table 14 Sample of Current Activity, Food & Wellness Operators on the Shannon (2019)**

ACTIVITY County	UPPER SHANNON			MID SHANNON				LOWER SHANNON		
	Cavan	Leitrim	Roscommon	Longford	Westmeath	Offaly	Galway	Tipperary	Clare	Limerick
<b>Angling</b>	Lough Gowna Cootehall Angling Oliver Fishing, Belturbet	Coarse Angling at: Lough Allen, Ballinamore, Mohill, C-on-S, Sandy Lough, Carrigallen Drowes Fishery NW Angling Dromahair	Angling Services, Boyle	Lanesboro-Rooskey River Shannon angling	Boat Hire - Fagan, Daly River Inny angling Ghillie - Farrell	Lough Boora Angling	River Suck angling	North Tipp Angling, Ballinderry; Lough Derg Coarse fishing, Dromineer; Lough Derg Pike Hunter, Dromineer; Fishing for Kids, Ballina Irish FishingTours,	Castleconnell Fishery, Ardnacrusha; Peche Irlande, Killaloe; East Clare gillies; Great Pike, Scariff; Lough Derg Angling Centre; FisHERMAN, Killaloe	Lower Shannon - multiple locations; Shannon Rivers & tributaries; Longshore Limerick
<b>Cycling</b>	Wildflower Cycling, Ballyconnell On Yer Bike, Belturbet	Electric Bikes, Leitrim Kingfisher Cycle Trail Crank & Cog, Manorhamilton	Electric Bike Trails Lough Gara Pursuits	Longford Cycle Hub, Longford Royal Canal Blueway	Buckleys Cycles Athlone; DB Cycles, Athlone	Birr Cycle Hub Buckleys Tullamore	Cycle Holidays Ireland, Ballinasloe; DeBurgo's Bike Hire, Portumna	North Tipp Wheelers, Nenagh; Upper Limits Climbing, Upperchurch		Ireland Hike-Bike, Limerick
<b>Cruising</b>	Corraquill Cruising Holidays (Barge), Aghalane	Shannon Erne Waterway Carrickcraft, Carrick-on-S Riversdale Barge Holiday, Emerald Star, Carrick-on-S Moon River Cruises	Lough Key Boats Pleasure Cruises, Rooskey	Pleasure Cruises, Rooskey	Lough Ree Cruisers Shannon Culture, Glasson; Shannon Princess, Glasson; Viking Cruises Moon River	Silverline Banagher; Carrickcraft Banagher; Waveline Banagher	Emerald Star, Portumna; Locaboat, Ballinasloe	Killaloe River Cruises - Spirit of Killaloe; Shannon LakeBoats, Killaloe	Killaloe River Cruises - Spirit of Killaloe; Shannon LakeBoats, Killaloe	Shannon Estuary RIB Tours, Foynes
<b>Activity Park/ Activity Operator/ Water Activity</b>	Cavan Canoe Centre @ Geopark Killykeen Forest Park Outdoor&Dirty Ballyconnell; Rural Adventure, Cootehill Instinctive Archery, Cootehill	Adventure Gently network Carrick-on-S Archery Awesome Adventure Leitrim Surf & Paddle Lough Allen Adventure Centre, Ballinaglera; Lough Rynn Rowing Centre Shannon Erne Blueway / Acres Lake Wild Atlantic Crusades	Lough Key Forest Park; Bay Sports Hodson; Shannon River Adventure, Roosky; Woodland Segway, Boyle; Ziplt, LKFP ; Shannon River Adventure, Rooskey Lough Gara Country Pursuits	Outdoor Discovery, Ballymahon; Centre Parcs	Lough Ree Yacht Club Rock'n'Bowl Athlone	Lough Boora Parklands; Shannon Adventure, Banagher; Birr OEC; MidIreland Adventure, Banagher; Birdwatch Ireland Banagher; Irish Parachute Club	Portumna Forest Park (Coillte) Watermark Ski Club Podumna camping	SkyDive Ireland Shannon Sailing, Dromineer; Lough Derg Yacht Club; Aqua Splash Dromineer; L. Derg Watersports Kilgarvan/ Brockagh.	Derg Boats Scariff, Holy Island Tours, Mountshannon;	NatKart & Adventure Centre; SUAS Climbing, Clonlara; Athlunkard Boat Club; Shannon Rowing Club; Limerick Wake&Ski; Nevsail Paddle SUP; Get West kayak SUP Shannon Dragons, Limerick
<b>Equestrian</b>		Drumshanbo Equest Centre Drumcoura Equest Centre	Roscommon Equest Centre		Athlone Equestrian Centre	Birr Equestrian Centre		Tipperary Mountain Equest Trekking Centre, Nenagh	An Sabin Equest Centre, Whitegate; Clonlara Equest Centre	
<b>Walking/ Nature</b>	UNESCO GeoPark Cavan Burren Park walks Cavan Way (26km) Woodford River Walk Hawkswood Swanlinbar Ballyconnell Loops	Miners Way Leitrim Way Slieve Anieran Jim McMorrow Walk Guide Aroo Mountain Trail	Rinn Doon/ St Johns; Arigna Miners Way; Wild Goose Bog; Boyle Heritage Walks; Suck Valley Way; Beara Breifne Way (Strokestown-Clondara famine Walk) Sliabh Bawn walks	Newcastle Woods, Ballymahon	Royal Canal Way Westmeath Way Old Rail Greenway Athlone Connaught Walk/ Heritage Trails Portlick Forest	Lough Boora Parklands; Clara/Mongan Bogs; Grand Canal; Birr Historic Trails; Offaly Way 38km Shannon Callows; Croghan Hill	Portumna Forest Park (walking/ cycling/ birdwatching)	Lough Derg Way Devils Bit/ SI Felim Nenagh Walks Sli Eala Dromineer Aonach ar Siul walk club Walk Ireland Roscrea	East Clare Way; Ballycuggaran Loops O'Brien Bridge loops Celtic Connections, ; Get West, Killaloe; UL Activity Centre, TwoMilePot; ClareWalking Tours, Tuamgraney; Seedsavers Scariff	Limerick Medieval Trails; Limerick Civic Trust trails;

<b>Food &amp; Gastro/ Drinks / Trad Pubs</b>	Conall Cearnach restaurant , Ballyconnell; Keepers Arms, Bawnboy MacNean House, Blacklion Olive Grove restaurant, Blacklion	Victoria Hall, C-on-S Vitto's, C-on-S Courthouse Kinlough Boardwalk Café ConS Shamrat India, ConS Sorohans, Drumshanbo The Barge, Leitrim CJs, ConS Reynolds, Ballinamore Charlie Farrellys Pub Oarsman, Carrick-onS Murtagh's Bar, Carrick-on-S Smyth's Pub, Ballinamore Priors Pub, Ballinamore	Keenans of Tarmonbarry Donnellans Pub and Restaurant, Knockvicar Stairs Gastro Pub, Boyle	Lough Ree Distillery, Lanesborough Rustic Inn, Longford Longford Arms The Market Bar & Restaurant, Longford Richmond Inn, Cloondara	Sean's Pub, Athlone Gertie Brownes; Fatted Calf, Glasson Grogans Glasson; Wineport Lodge, Glasson Nannie Murphy's, Glasson Village Restaurant; Hatters Rest, Athlone Left Bank Bistro, Athlone; Riverside Inn, Athlone	Whigsborough House Birr; Emmet Restaurant, Birr Hennessy's Pub, Ferbane; Lukers Pub & Café, Shannonbridge; Keatings, Shannonbridge	Red Oak Restaurant, Portumna	Derg Inn, Terryglass Paddy's Pub, Terryglass Larkins, Garrykennedy Whiskey Still, Dromineer Derg Room, Ballina; Goosers, Ballina; Country Choice Nenagh; The Peppermill, Nenagh	Mollys Bar, Killaloe; Anchor Inn, Killaloe, Peppers Feakle, Pipers Ogonolloe; Half Barrel Whitegate; The Island Tuamgraney; Shortts trad pub, Feakle; Wild Irish Chocolates, Tuamgraney; Seedsavers, Scariff	Dolans, Limerick; Acorn, Castleconnell; French Table, Limerick; Nancy Blakes;
<b>Spa/ Wellness</b>	Ciuin Spa, Slieve Russell Hotel, Ballyconnell	Oshadi Spa, Lough Allen Ardnahoo Eco Retreat & Yoga Centre	Kilonan Castle & Spa Lough Rynn Castle		Wineport Lodge, Glasson Sirana@Sheraton			Coolbawn Quay, Lough Derg	East Clare Yoga Centre, Tuamgraney	
<b>Attractions</b>	UNESCO Marble Arch Caves & Cuilcagh Mountains Geopark		Lough Key Forest Park; Arigna Mining Experience; Strokestown House & Famine Museum; Boyle Abbey King House, Boyle Roscommon Castle	Corlea Trackway Inchcleraun/ Lough Ree	Athlone Castle SS Peter & Paul ( <i>Harry Clarke windows</i> ); Lough Ree Islands	Clonmacnoise Monastic Complex; Birr Castle & Observatory; Shannonbridge Napoleonic Fort	Portumna Castle Portumna Friary Portumna Famine Workhouse Ballinasloe Horse Fair	Nenagh Castle & Keep	Holy Island Monastic Complex, L. Derg; Ardnacrusa Power Station VC	St John's Castle; Hunt Museum; Georgian Core of Limerick; UL World Music Centre

## 4.6 Accommodation

The IHH area contains approximately 4% of the Country’s bed stock, with occupancy levels estimated at 60%. There are no Fáilte Ireland estimates for tourism visitors or revenue for hubs along the Shannon, but information on the number of existing Fáilte Ireland registered bed-spaces gives a better idea of the size of the tourism accommodation sector across the masterplan area. There are in total 3,872 bed spaces, with 4-star hotels making up the majority of the overall provision. There is one 5-star hotel located in Limerick. These figures do not take into account B&B provision or privately-owned accommodation promoted solely through channels such as AirBnB.

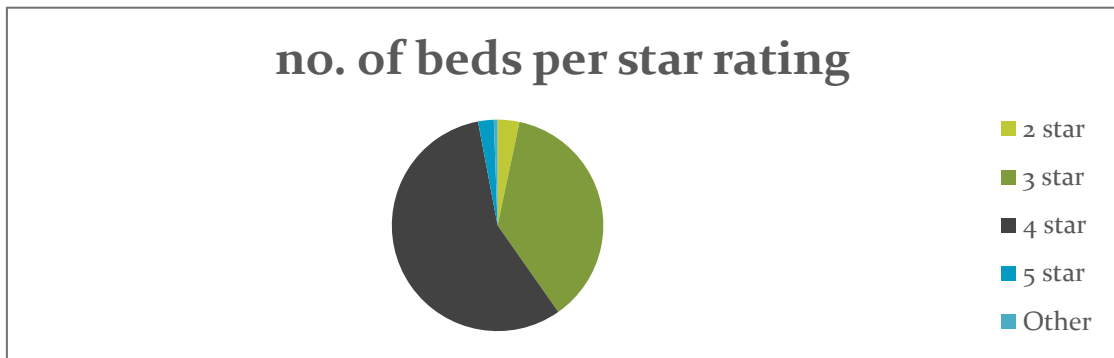


Figure 9 illustrates the location of these facilities and in terms of geographical distribution. The Athlone/Glasson hub is by far the best serviced area, but there is a significant gap in provision between Glasson and Carrick on Shannon. South of Athlone, hotel provision exists but is weak until you reach Killaloe and Ballina in Tipperary/Clare.

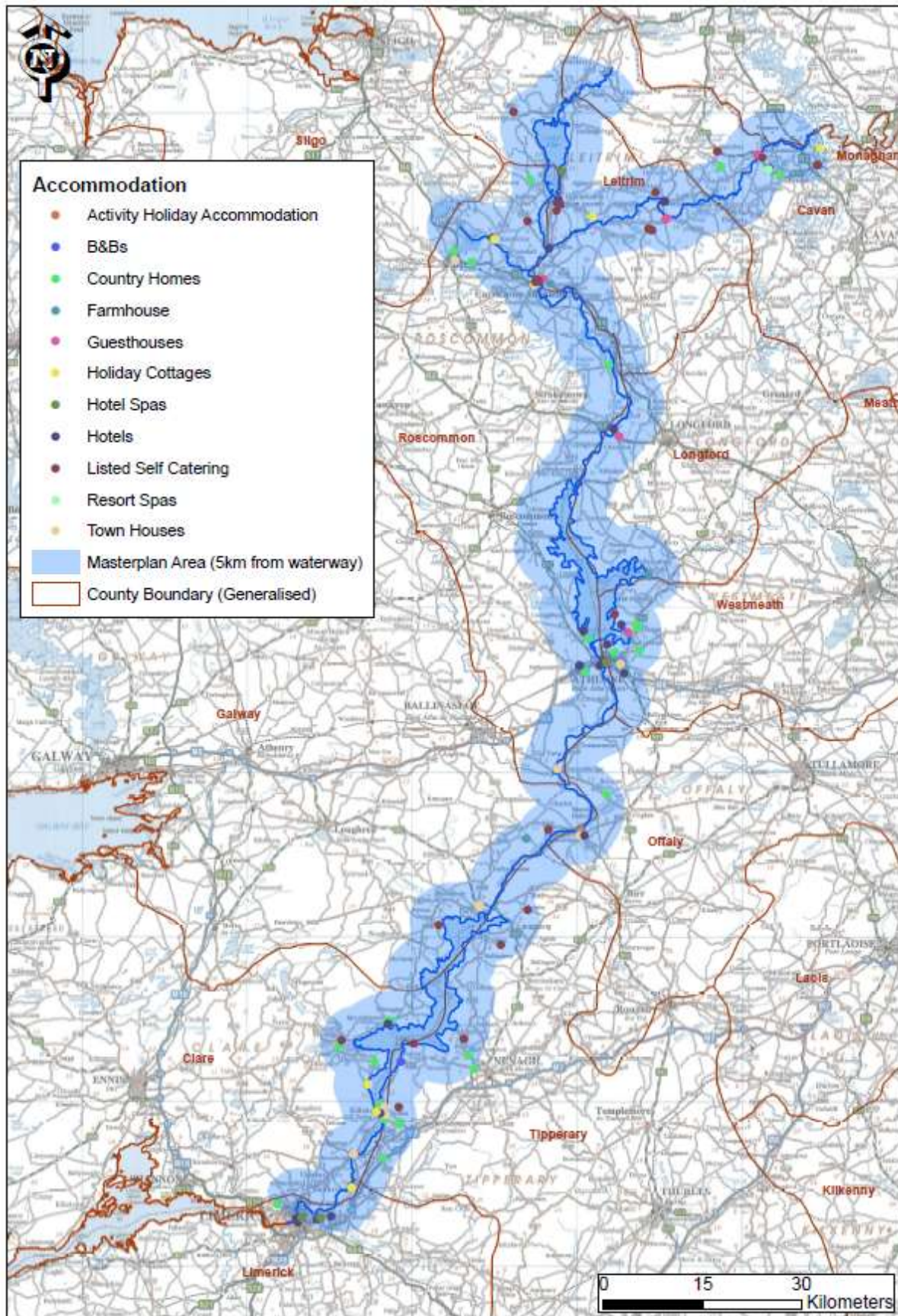


Figure 9 Distribution of Accommodation across the Masterplan Area

## 4.7 Existing Attractions

Fáilte Ireland, with the help of 16 visitor attractions across the country, undertook a pilot study in the summer of 2016 to find out what appeals to tourists when it comes to visitor experiences. The research identified key elements that influence visitor satisfaction levels – coupled with insights from around the world, gives a greater understanding as to what makes a great visitor attraction. It should be noted however that with the exception of the ‘Iconic Historic’, attractions are less of a motivation to travel with 60% of visitors not having heard of an attraction prior to booking.

### GUIDED TOURS

Tours make all the difference



### STORY CONTENT

A good story goes a long way



### DELIVERY

Interpretation – there are lots of ways to tell a story



### NAVIGATION

Coherent layouts



### VISITOR MANAGEMENT

Remember the person in the crowd



### TRANSACTIONS

Keep Transactions Simple



Our assessment of visitor attractions within the study area is included as an appendix to this document (Appendix 1). The assessment considers each major attraction in the Shannon Region in the context of each of the proposed themes of the interpretation framework. A list of key attractions in the study area is provided in Table 15.

**Table 15 Review of Key Attractions within the Study Area**

Name	Location	Visitor Numbers	Category	County	Management Plan, date
<b>Clonmacnoise</b>	Clonmacnoise	170,074	Churches, Abbeys and Monasteries	Offaly	World Heritage Site Draft Management Plan 2009 – 2014, Site at capacity
<b>Boyle Abbey</b>	Boyle	7,772	Churches, Abbeys and Monasteries	Roscommon	OPW, refreshed interpretation proposed
<b>Saint Cronan's Church</b>	Tuamgraney		Churches, Abbeys and Monasteries	Clare	
<b>Portumna Castle</b>	Portumna	15,665	Historic Houses and Castles	Galway	OPW, refreshed interpretation proposed
<b>King John's Castle</b>	Limerick City	100,000	Historic Houses and Castles	Limerick	
<b>King House</b>	Boyle	13,570 (2010 figure)	Historic Houses and Castles	Roscommon	
<b>Strokestown House &amp; Famine Museum</b>	Strokestown	50,000	Historic Houses and Castles	Roscommon	
<b>Hunt Museum</b>	Limerick City	100,000	Museums and Attractions	Limerick	
<b>Arigna Mining Experience</b>	Arigna	30,000	Museums and Attractions	Roscommon	
<b>Athlone Castle</b>	Athlone	30,000	Museums and Attractions	Westmeath	
<b>Lough Key Forest and Activity Park</b>	Carrick On Shannon	70,000	National and Forest Parks	Roscommon	Masterplan in progress
<b>Cavan Burren</b>	Co. Cavan	30,000	Natural Features	Cavan	Cavan Burren Park Expansion and Development Plan
<b>Lough Boora</b>	Offaly	100,000	Natural Features	Offaly	
<b>Corlea Trackway</b>	Lanesborough	5,353	Archaeological Heritage	Longford	
<b>Rindoon</b>	Lecarrow Lough Ree	6,500	Historic Houses and Castles	Roscommon	Rinn Dúin Conservation and Management Plan, March 2012
<b>Holy Island / Inis Cealtra</b>	Lough Derg	c. 6,000	Monastic Heritage	Clare	Inis Cealtra Visitor Management & Sustainable Tourism Development Plan July 2017, max 40,000 pax pa
<b>Ardnacrusha HEP Station</b>	Ardnacrusha	n/a	Other Heritage	Clare	Note: Ardnacrusha is open by appointment only

## 4.8 Festivals and Events

Festival and events, including exhibitions, performances, concerts, water festivals or foods are designed to be participative, based on a specific focus or theme and are an important mechanism to engage visitors in Shannon's contemporary culture and traditions.

The Shannon Region currently enjoys a commendable programme of festivals throughout the year (see sample of current listings - [Table 16](#)). They include a range of water-based activity and family festivals; angling; walking; cycling; triathlons; trad music; literature; sailing; food and community events.



Table 16 Indicative Sample of Festivals and Events in Shannon Region (2019-2020)

SHANNON REGION	UPPER SHANNON			MID SHANNON			LOWER SHANNON			
County	Cavan	Leitrim	Roscommon	Longford	Westmeath	Offaly	Galway	Tipperary	Clare	Limerick
<b>Water-based/ Activity</b>	<i>Festival of the Erne</i>	<i>Carrick on Shannon Regatta</i>		<i>Clondara Harbour and Cultural Festival</i>	<i>Athlone River Festival</i> annual	<i>RiverFest 2019, Shannonbridge Canal Quarter Festival</i>	<i>Waterways Ireland Portumna Festival Lough Derg Blueway</i> 10k Challenge	<i>Lough Derg Yacht Club, Dromineer – sailing festivals</i> <i>Heritage Boats Festival</i> (moves along the Shannon)	<i>Killaloe Water Festival Scariff Harbour Festival</i> <i>Féile Brian Ború</i> Mountshannon <i>Shannon Dragon Boats, O'Brien's Bridge Rowing Festivals, O'Brien's Bridge</i>	<i>Riverfest</i> Limerick May 2020
<b>Angling</b>	<i>King of Clubs</i> , Angling <i>World Pairs</i> , Angling Multiple local angling competitions	Multiple local angling competitions	<i>International Shannon Angling Festival</i> , Ballyleague <i>Easter Pike Festival</i> , Boyle	Multiple local angling competitions	<i>Lough Ree International Angling Festival</i> Multiple local angling competitions	Multiple local angling competitions	Multiple local angling competitions	<i>Annual Mayfly fishing</i> , Lough Derg <i>Predator Battle Ireland</i> , Ballina	<i>Annual Mayfly fishing</i> , Lough Derg <i>Predator Battle Ireland</i> , Killaloe	Multiple local angling competitions
<b>Walking/ Cycling/ Running/ Outdoors</b>	<i>Cavan Walking Festival</i> <i>Geopark Festival Week</i>	<i>North Leitrim Glens Hill Walking Festival</i> <i>Leitrim Cycling Festival</i>			<i>TriAthlone Trifest</i> Mullingar	<i>Birr Air Display</i>	<i>Portumna Forest Marathon</i>	<i>Quest Lough Derg - Ballina triathlon.</i> <i>Nenagh Annual Walking Festival</i>	<i>Clare Walks Festival</i> <i>Killaloe Colour Run</i>	<i>Great Limerick Run</i> -annual
<b>Family / Fun</b>				<i>Abbeyshrule Family Fun Day &amp; Fly In</i>		<i>That Beats Banagher</i>				<i>Cruinniú na nÓg</i>
<b>Music/ Trad</b>	<i>Belturbet Fleadh</i>	<i>Carrick-on-Shannon Water Music Festival</i> (5days) <i>Sessions on the Shannon</i> , C-on-S <i>Joe Mooney Trad Summer School</i> <i>Cowboys &amp; Heros</i> , Ballinamore <i>Mohill Bluegrass Festival</i>	<i>O'Carolan Harp Festival</i> , Keadue 29Jul-5Aug19 <i>Féile Frank McGann</i>	Longford <i>Fleadh Ceol</i>		<i>Birr Festival of Music Beat on the Street</i> , Banagher			<i>Kincora Traditional Weekend</i> <i>Feakle Trad Music Festival</i>	<i>International Choral Festival</i> June19 <i>BLAS Trad Fest</i> Jun-July <i>Limerick Jazz Fest</i> Sept
<b>Arts/ Literary</b>		<i>International Wild Rose Festival</i> , Manorhamilton; <i>John McGahern Literary Festival</i>	<i>Boyle International Arts Festival</i> <i>Strokestown Poetry Festival</i> <i>Roscommon Drama Festival</i>		<i>Athlone International Drama Festival</i>	<i>Birr Film Festival</i>	<i>Shorelines Arts Festival</i> , Portumna	<i>Dromineer Literary Festival / September</i> <i>Terryglass Arts Festival</i> <i>Spleoda Arts Festival</i> , Nenagh		<i>Kate O'Brien Literary Festival</i> , annual <i>Limerick Writers Festival</i> Apr2020 <i>Spirit of the City</i> , Limerick Celtic Horizon Open
<b>Heritage / Environment</b>	<i>Cathal Bui Festival</i> , Blacklion		<i>Rooskey Heritage &amp; Water Festival</i>	<i>Lough Ree Environmental Summer Festival</i>	<i>Athlone Castle Medieval Fair Bealtaine</i> , Loughnavalley	<i>Birr Vintage Week &amp; Arts Festival</i>	<i>Portumna Trad Oak Festival</i> ; Heritage Week <i>Portumna Irish Workhouse Centre</i>	<i>Nenagh Castlefest</i>		<i>Open House Festival of Architecture</i> 18-20 Oct19 <i>Samhain Halloween Fest</i> <i>Limerick Garden Festival</i>
<b>Food &amp; Tastes; Agriculture</b>			<i>Roscommon Lamb Festival</i>	Longford <i>Agricul Show</i> Longford <i>Ploughing Championships</i> <i>The Harvest Festival</i>	<i>Agricultural Show Mullingar</i> <i>International Horse Show</i>		<i>International October Fair &amp; Festival</i> , Ballinasloe	<i>A Taste of Lough Derg</i> North Tipperary Agricultural Show		
<b>Community</b>	<i>Bawnboy Community Festival</i> <i>Basket-weaving in Belturbet</i>	<i>Carrick-on-Shannon Community Festival</i>								

## 5.0 International Best Practice

This section reviews models of international best practice that could potentially be transferable to the Shannon/Irish Waterways. It is also linked to understanding the motivation for travel of the top four Irish markets (see Section 2.3).

In preparing this summary of international best practice, we have also considered proximity and similarity of product in the context of the four key markets.





### 5.1 UK Market

Scotland is probably closest model to Ireland internationally. One of the principal international cruise hire operators in Ireland, Le Boat, has both an Irish and Caledonian Canal operation<sup>13</sup>.

However, during discussions with IBRA it was considered that both the Thames and the Norfolk Broads are more about barge hire offering and industrial heritage as it is waterways experience, thus has little crossover. The IBRA considered both examples and feels that neither provides a direct parallel or transferable learning for the Irish waterways / cruise hire fleet.

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<sup>13</sup> Note: Sign on the western terminus of the Caledonian Canal (Oban) says next stop Ireland for self-sail boats coming from Scandinavia.

<b>Area/Location</b>	<b>Norfolk Broads (England, east coast)</b>	
<b>Description</b>	An area of flooded peatlands with extensive waterways and wetlands: <ul style="list-style-type: none"> <li>• &gt;300km<sup>2</sup> in total</li> <li>• &gt;120km<sup>2</sup> of navigable waterways</li> <li>• habitats of reedbeds, wet woodland and seasonal grazing marshes</li> </ul>	
<b>No. visitors annually</b>	Approx. 7.6M	
<b>Photos</b>	    <p data-bbox="917 1473 1295 1503">All photos © The Broads Authority</p>	
<b>Comparison to Shannon</b>	<b>Navigable inland waterway, with extensive wetland habitats. Long history habitation. In contrast to the Shannon, the Broads is a manmade feature, arising from peat-cutting in the medieval period. Extensive opportunity for walking/cycling. Many villages and towns. Straddles just two counties (Norfolk and Suffolk), and is an area rather than a linear feature.</b>	
<b>Responsible authority / website</b>	The Broads Authority. The Broads has similar status to a National Park, but does not have official national park designation. <a href="http://www.broads-authority.gov.uk">http://www.broads-authority.gov.uk</a>  Broads Tourism works in conjunction with the Broads Authority to promote the area <a href="http://www.visitthebroads.co.uk">www.visitthebroads.co.uk</a>	


## 5.2 The German Market

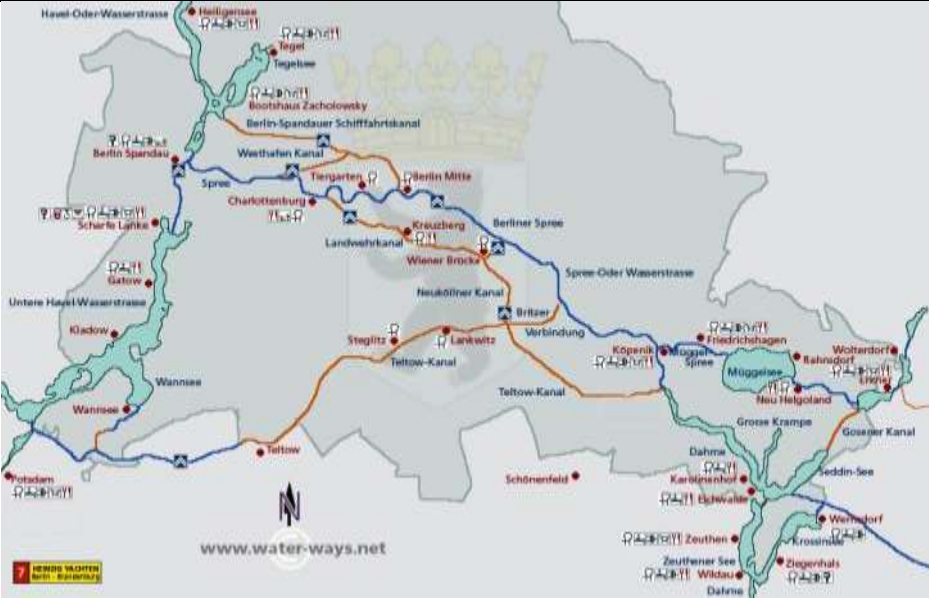
In terms of German comparators, there are a number of different water regions where motorboats are available for hire. Interestingly there are certain regions where very few boats are available (e.g. 11 for Lake Constance and 9 for the Moselle River).

In 1990, the reunification of Germany opened up travel between West and East Germany for the first time since the end of WW2. Areas such as Berlin and the Baltic Sea were opened up to visitors. In terms of water-based activity, the area around Berlin would be considered a hotspot (see Berlin, Havel River, Spree and Brandenburg). The lakes adjacent to Berlin are interconnected acting as the green lung of the city and offer self-driving cruise hire (likewise in Poland), although a license is required. This may again have contributed to the drop in the 90s in Ireland, as people were suddenly able to do more boating and gain access to water within Germany.



**Boundary of East and West Germany pre unification in 1990**

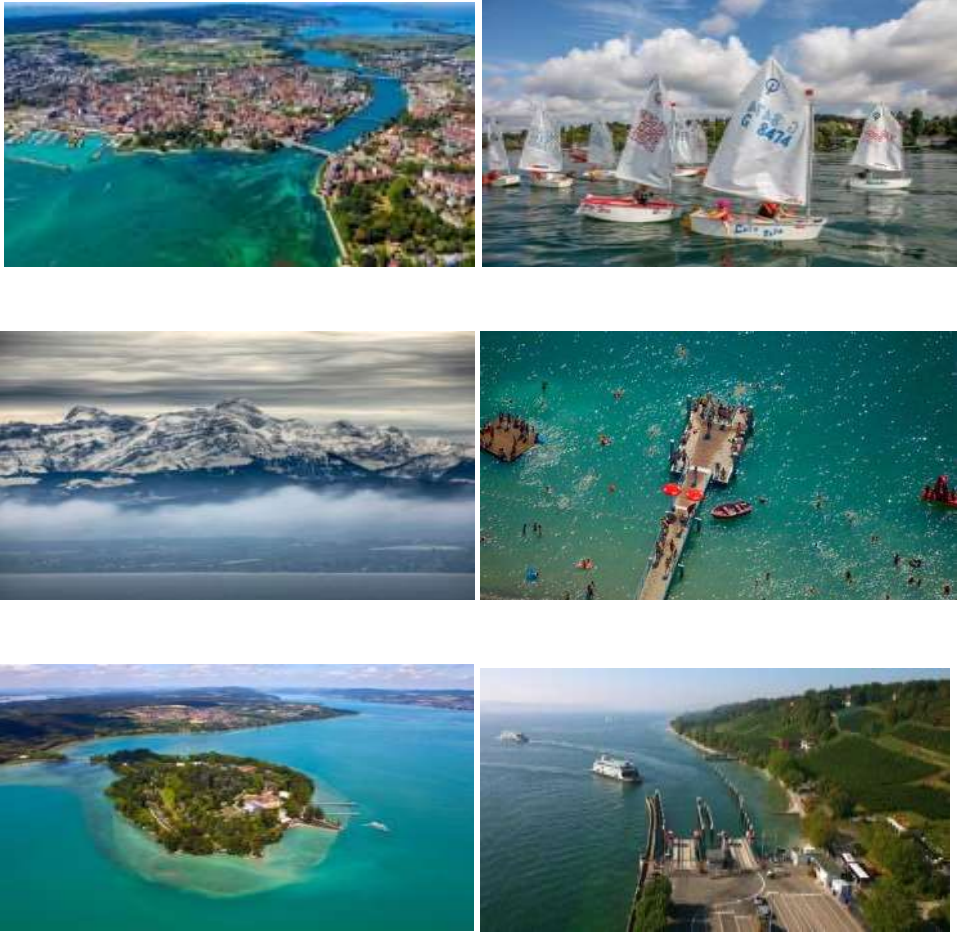
<b>Area/Location</b>	<b>Berlin Waterways (river Havel, Wannsee, Lake Tegel, Mueggelsee, river Spree, as well as several canals)</b>
<b>Description</b>	<ul style="list-style-type: none"> <li>• Waterways surrounding Berlin (note: for access to the inner city of Berlin a skipper is recommended, due to increased traffic and as radio contact is a required); boating includes motorboats, but also sailing, pedal boats, rafts, solar boats, canoes...</li> <li>• small motorboats (&lt; 15HP) can be rented without a boat driver’s license, but these typically do not have cabins for overnight stays; boats for overnight stays typically require a driving license.</li> <li>• In order to get a German boat driver’s license (‘Sportbootfuehrerschein Binnen’), a theory and practical exam must be passed.</li> <li>• According to the below website, boating is growing in popularity, due to cost reductions in recent years, as there is a very good waterways network around Berlin/Brandenburg and as everyone can rent a boat, although a license is required for some (see above): <a href="https://www.in-berlin-brandenburg.com/Freizeit/Ausflugstipps/Gewaesser/Bootsverleih/">https://www.in-berlin-brandenburg.com/Freizeit/Ausflugstipps/Gewaesser/Bootsverleih/</a></li> <li>• Moorings available throughout Berlin (see names in red on map below)</li> <li>• On water accommodation and saunas available (see photos below)</li> </ul>
<b>No. visitors annually</b>	Could not find any specific information about the no. of people using boats in Berlin/Brandenburg.
<b>Photos</b>	 <p>Photos taken from <a href="https://www.berlin-bootsverleih.com/en/driveyourself">https://www.berlin-bootsverleih.com/en/driveyourself</a></p>


	 <p>The map displays the extensive waterway network around Berlin, including the Havel-Oder-Wasserstrasse, Spree-Oder-Wasserstrasse, and various canals like the Wehshafen Kanal, Landwehrkanal, and Teltow-Kanal. It also shows major districts and landmarks.</p>
<p><b>Comparison to Shannon</b></p>	<p>Main attraction is boating through/nearby a capital city; however, driver’s license is required for larger boats and city location takes away from the natural experience.</p>
<p><b>Responsible authority / website</b></p>	<p>Some information found on <a href="https://www.in-berlin-brandenburg.com/">https://www.in-berlin-brandenburg.com/</a>, which appears to be a general information page put together by an individual.</p> <p>Berlin Boat Rental taken from private boat rental company website: <a href="https://www.berlin-bootsverleih.com/en/driveyourself">https://www.berlin-bootsverleih.com/en/driveyourself</a></p> <p>The Tourism Marketing Brandenburg GmbH provides boating information <a href="https://www.brandenburg-tourism.com/discover-brandenburg/houseboat-tours.html">https://www.brandenburg-tourism.com/discover-brandenburg/houseboat-tours.html</a></p>

Area/Location	Spreewald
<p><b>Description</b></p>	<ul style="list-style-type: none"> <li>• Spreewald is Biosphere Reserve (UNESCO World Heritage Site), located approx. 100km southeast of Berlin and northwest of Cottbus</li> <li>• The Spreewald, also known as “the Green Venice”, is a unique natural landscape with an extensive network of small rivers measuring around 970km; Slavic tribes settled here in the 6<sup>th</sup> century bringing with them many traditions and customs still followed today.</li> <li>• Activities include: hiking (many trails mostly on level ground, between 5-25km); canoeing (several boat hire places in each town/village); biking (well signposted bike trail network, e.g. the Spreewald gherkins bike trail, 250km)</li> </ul>
<p><b>No. visitors annually</b></p>	<p>2017: 733,600 visitors; 1,863,600 overnight stays.</p>

<p><b>Photos</b></p>	 <p>All photos taken from <a href="https://www.spreewald.de/en/spreewald-holiday/">https://www.spreewald.de/en/spreewald-holiday/</a></p>
<p><b>Comparison to Shannon</b></p>	<p>Restricted to non-motorised boats only. Narrow / shallow waterbody.</p>
<p><b>Responsible authority / website</b></p>	<p>Spreewald Tourism Association (looks after all tourism concerns of the region)  <a href="https://www.spreewald.de/en/spreewald-holiday/">https://www.spreewald.de/en/spreewald-holiday/</a></p>

Area/Location	Lake Constance (Bodensee)
<p><b>Description</b></p>	<ul style="list-style-type: none"> <li>• Lake in southern Germany on the border with Austria and Switzerland. The Alps are located and can be seen to the south of the lake, the Rhine river passes through the lake. The region is famous for its orchards.</li> <li>• Activities including bathing, hiking (e.g. shore path, taking 8-10 days), cycling (e.g. 270km surrounding the lake, taking 4-7 days) and water sports (e.g. stand-up</li> </ul>

	<p>paddling, sailing, windsurfing, canoe tours).</p> <ul style="list-style-type: none"> <li>• Nature experiences, such as birdwatching and gardens to visit (e.g. Mainau Island and Reichenau Island UNESCO World Heritage Site).</li> <li>• Boat trips connecting different parts of the shore for day trips and/or ferry service.</li> <li>• Many museums close to the lake (e.g. Zeppelin Museum Friedrichshafen, Lake Dwelling Museum Unteruhldingen).</li> <li>• Many campsites, hotels, holiday homes and apartments.</li> </ul>
<p><b>No. visitors annually</b></p>	<p>2016: 20.3 million overnight stays for the whole region surrounding the lake (including Austria and Switzerland; 40% in the German area)</p>
<p><b>Photos</b></p>	 <p>All photos taken from <a href="https://www.bodensee.eu/en">https://www.bodensee.eu/en</a></p>
<p><b>Comparison to Shannon</b></p>	<p><b>Lake Constance: Lake access in many areas (bathing beaches, promenades within towns), many tourist attractions, views of the Alps; many signposted cycling and hiking paths and water-based activities; motor boating not specifically advertised.</b></p>
<p><b>Responsible authority / website</b></p>	<p>Tourist Board of Lake Constance / Internationale Bodensee Tourismus GmbH - <a href="https://www.bodensee.eu/en">https://www.bodensee.eu/en</a></p>

<b>Area/Location</b>	<b>Baltic Sea Germany (German states of Schleswig-Holstein and Mecklenburg-Vorpommern)</b>
<b>Description</b>	<ul style="list-style-type: none"> <li>• 350km coastline from the border with Denmark to Poland (note: large section in former East Germany and therefore not easy to visit until 1989)</li> <li>• Six Hanseatic cities (Kiel, Luebeck, Rostock, Wismar, Stralsund and Greifswald) with medieval town centres, including many museums and churches.</li> <li>• Small fishing villages, with holiday homes/apartments; seaside resorts and spas, with attractions such as sea bridges and diving capsules</li> <li>• Many sandy beaches, not influenced by the tide</li> <li>• Main activities: bathing, cycling (1,000km of cycle paths), sailing, beach volleyball, surfing, kite surfing, fishing, diving</li> <li>• Two National Parks, 'Vorpommersche Boddenlandschaft' (mainly marshland) and Jasmund National Park on the island of Ruegen (Beech woods and chalk cliffs)</li> </ul>
<b>No. visitors annually</b>	6.82 million people holidayed on the Baltic Coast in 2018 (29.8 million overnight stays in Mecklenburg-Vorpommern only).
<b>Photos</b>	 <p>All photos taken from <a href="https://www.ostsee.de/baltic-sea-germany/">https://www.ostsee.de/baltic-sea-germany/</a></p>
<b>Comparison to Shannon</b>	<b>Baltic Sea: many access points to the coast/beaches; signposted walking and cycling routes; several cities with many attractions; many water-based activities; motor boating advertised on a small scale. However, is coastal offering and not a river attraction.</b>
<b>Responsible authority / website</b>	ostsee.de INFO GmbH - <a href="https://www.ostsee.de/baltic-sea-germany/">https://www.ostsee.de/baltic-sea-germany/</a> (Not specifically stated, but seems to be an umbrella body incorporating the administrations of many of the coastal towns and villages, as well as tourism and nature organisations from within the area)

## 5.3 Other European

There is nothing similar to the River Shannon experience in Italy except for the interconnected inland waterways between **Venice and Rimini** (see: [www.filovent.com](http://www.filovent.com)). Some boats may be rented without a license. The world renowned '**Great Lakes**' offering in Lakes Garda, Como and Maggiore, as well as the smaller regional lakes of northern Italy, while very attractive, provide a 'controlled' lake cruise from coastal village to village, without self-driving boat hire or 'wild' exploration of the lakes.

## 5.4 The US Market

**Lake Tahoe** is located in eastern California and western Nevada, with the border between the two states running down the centre of the lake. In 2013, a study conducted by the Strategic Marketing Group found that North Lake Tahoe had begun to fall behind comparable destinations. Tourism is by far the largest employer and generator of revenue in North Lake Tahoe, so a taskforce was formed to develop a masterplan. The Lake Tahoe Masterplan has four main aims:

- Outline implementation strategies and actions to assist Placer County, North Lake Tahoe, partner agencies and NLTRA in aligning visions and attaining common goals.
- Align with other plans currently in place that are working to strengthen the tourism economy in North Lake Tahoe.
- Incorporate robust public outreach into the planning process to define investment priorities over the next eight years.
- Continue to transform North Lake Tahoe into a national and international recreation destination.

Considerable planning and research went into the development of the masterplan. Visitor research was conducted in 2012 and 2014, with questions as where tourists came from and what activities they enjoyed. Comparable winter and summer destinations were examined, as were trends. There was comprehensive public outreach, with a series of workshops being used to create a public survey which prioritised the areas of concern:

- visitor activities & facilities;
- transportation;
- marketing & sales,
- visitor information; and
- resource development.

Action plans to address these areas were drawn up and enacted, which included:


- Changes to one town centre, making it more pedestrian-friendly;
- The development of bike trails along the lakeshore and public parks; and
- Improved flight schedules from the Reno-Tahoe airport to New York and Mexico City.

Each of those areas has a clearly-defined goal outlined in the masterplan.

North Lake Tahoe has strengthened its branding from an outdoor sports viewpoint, with two adventure or endurance events having been developed. Newer accommodation has been developed and that has already demonstrated that it can generate significantly more revenue than the pre-existing older accommodation. A lack of mid-range, branded hotels has also been identified. Public transport and alternatives to driving has also been identified as a weakness in the area and there are plans to strengthen links and improve individual networks.

***“The importance of a convenient, clear and easy to navigate transportation system is growing.”***

The tourism masterplan is aligned with a large number of other plans, including sustainability, transit and groups of resorts.

<b>Area/Location</b>	<b>North Lake Tahoe, USA</b>	
<b>Description</b>	Lake Tahoe is located in eastern California and western Nevada, with the border between the two states running down the centre of the lake. <ul style="list-style-type: none"> <li>• 12 towns or resorts</li> <li>• c 2,000m above sea level</li> </ul>	
<b>No. visitors annually</b>	3.8M visitor days (2016)	
<b>Photos</b>	 <p style="text-align: right;"><i>Photos: North Lake Tahoe Tourism Master Plan – Placer County</i></p>	
<b>Comparison to Shannon</b>	Lake and mountain-based activities. Marketed as a year-round destination. Natural beauty. Crosses state boundaries (California and Nevada) and needed a coherent plan. Many of the offerings were dated and needed a rethink. Strong focus on improving transportation and trails to give greater access to visitors, particularly modern urban dwellers, many of whom do not drive.	
<b>Responsible authority / website</b>	North Lake Tahoe Resort Association <a href="http://www.nltra.org">www.nltra.org</a>	

### Saranac Lake Destination (New York State, USA)





**Saranac Lake** is in the northern part of New York state and is close the Upper, Middle and Lower Saranac Lakes. The largest of the lakes is comparable in size to Lough Allen and the other two are comparable to

Lough Key. The entire region is in the Adirondack mountains. The development of a masterplan was funded by the county tourist bureau.


The vision of the masterplan includes the statement that it wishes to be *“a regional leader in stewardship of public resources, building a partnership among users and managers of public resources, and developing and standardizing a strong set of practices related to the stewardship of natural resources”*.

The masterplan outlines goals, actions, responsible bodies and expected timelines. Improvements in infrastructure, pedestrianisation of towns and expansion of trails are key parts of the masterplan.






## 5.5 Other Markets

<b>Area/Location</b>	<b>Sava River (Balkans)</b>	
<b>Description</b>	The Sava River runs through the Balkans, from Slovenia to Serbia and is a tributary of the Danube.	
<b>No. visitors annually</b>	Unknown – numbers not collated	
<b>Photos</b>	   	
<b>Comparison to Shannon</b>	The Sava river is almost 1,000km long and crosses international boundaries. It passes through unspoilt countryside and its significant wetlands and wet forests act as a natural sponge, preventing flooding downstream. There is a transnational body to manage the river basin, but it has struggled to incorporate a tourism strategy across multiple jurisdictions. It is a beautiful part of the Balkan peninsula, but is largely unknown outside the region.	
<b>Responsible authority / website</b>	<a href="http://www.savacommission.org/">http://www.savacommission.org/</a>	

<b>Area/Location</b>	<b>North Vancouver Island</b>
<b>Description</b>	A coastal section on Vancouver Island

<b>No. visitors annually</b>	4.4M to entire island, proportion to North unknown	
<b>Photos</b>	 <p data-bbox="320 1093 707 1126">All photos: Vancouver Island Travel</p>	
<b>Comparison to Shannon</b>	Vancouver Island is a well-known travel destination, both within Canada and internationally. However, North Vancouver Island is not the best-known part, despite having a lot to offer. It is a natural landscape, with a series of towns and communities but before its tourism strategy, was struggling to attract a significant portion of the visitor numbers to the entire island.	
<b>Responsible authority / website</b>	Tourism BC <a href="https://www.hellobc.com/">https://www.hellobc.com/</a>	

<b>Area/Location</b>	<b>Margaret River, Western Australia</b>	
<b>Description</b>	<p>Margaret River is located in southern Western Australia and is best known for its beaches and wineries. Research conducted by WA Tourism discovered that tourists want more than the typical experiences associated with the region and that the natural environment featured strongly in the top four themes identified by the research:</p> <ul style="list-style-type: none"> <li>• Unique or extraordinary natural sites;</li> <li>• Beautiful beaches and coastlines;</li> <li>• A pristine natural environment; and</li> <li>• Local food and wine.</li> </ul>	
<b>No. visitors annually</b>	1.6M (average for 2015-2017)	

<p><b>Photos</b></p>	 	   <p>Photos: margaretriverguide.com.au</p>
<p><b>Comparison to Shannon</b></p>	<p>Both coastal and inland, with river being a major feature. Rural landscape but heavily influenced by agriculture. Coastal area is well-known but inland only known for wineries, when it has much more to offer. Attempting to develop extensive trails.</p>	
<p><b>Responsible authority / website</b></p>	<p>www.margaretriver.com</p>	

### 5.5.1 Summary of Comparator Destinations

The international best practice review is ongoing, but based on the data gathered to date, no immediately comparable international competitor has been established.

Although the Canada/US; UK (including Scotland); France; Germany; Poland; Sweden all have recognisable markets they all present quite a different configuration and product offering.

**The Irish proposition is considered to be unique for the following reasons:**

- ✓ Offers freedom and tranquillity
- ✓ An uncluttered, clean and heritage-rich environment.
- ✓ Accessible to all, as no license is required,
- ✓ With a competitively priced cruising fleet.

## 6.0 Emerging Thematic Framework

Once finalised, the thematic framework will directly inform overarching masterplan strategy as well as proposals for each sub region. The following themes were initially identified in early 2019 for discussion.

### 6.1 Initial Themes for Thematic Workshop

#### 6.1.1 The Living Shannon:

- Wild water and wet land
- Activity and Adventure
- Nature
- Landscape

#### 6.1.2 Shannon Routes, Crossings & Meetings:

- Travel along, across and beside the river
- Meet in towns and villages
- Journeys and challenge
- Rooted in history

#### 6.1.3 The Timeless Shannon:

- Continuity and change
- A shift in time and pace
- Escape

#### 6.1.4 Wellspring of Early Christianity;

- Saints and Scholars,
- Pilgrims
- Clonmacnoise
- Reflection

#### 6.1.5 People of the River Shannon:

- Contemporary communities,
- Traditions,
- Music art, craft
- Food

#### 6.1.6 The Shannon, mighty river of Ireland:

- Scale and length
- Folklore and legend
- Symbol of Ireland

## 7.0 Shannon Sub Regions – Emerging Baseline Assessment

Current data capture in relation to each sub region is presented below. This is a work in progress as there are some gaps in information received to date. The baseline assessment for each sub region will be used to define specific Masterplan interventions and highlight key product development opportunities.

### 7.1 Upper Shannon

The Upper Shannon boasts a complex network of lakes, rivers and canals (Figure 10). Lough Allen and Lough Key are the two major lakes in the northernmost part of the River Shannon. Lough Allen lake is overlooked on the Eastern shore by Sliabh an Iarainn and from the Western shore by the Arigna Mountains, providing outstanding views and opportunities for exploring on foot or bike. In Co. Roscommon, Lough Key rests between the expanse of forest, parkland and hills, providing a range of outdoor activities.

The Shannon-Erne Waterway, formerly the Ballinamore-Ballyconnell Canal, links the River Shannon in the Republic of Ireland to the Erne System in Northern Ireland. The navigation is approximately 61km (38 miles) long and links the village of Leitrim with the Erne system, downstream from Belturbet. Within the navigation there is a total of 16 locks and 34 bridges, with 8 locks from Leitrim to the summit level at Lough Scurl, and 8 locks to the Woodford River and on to the Erne System.

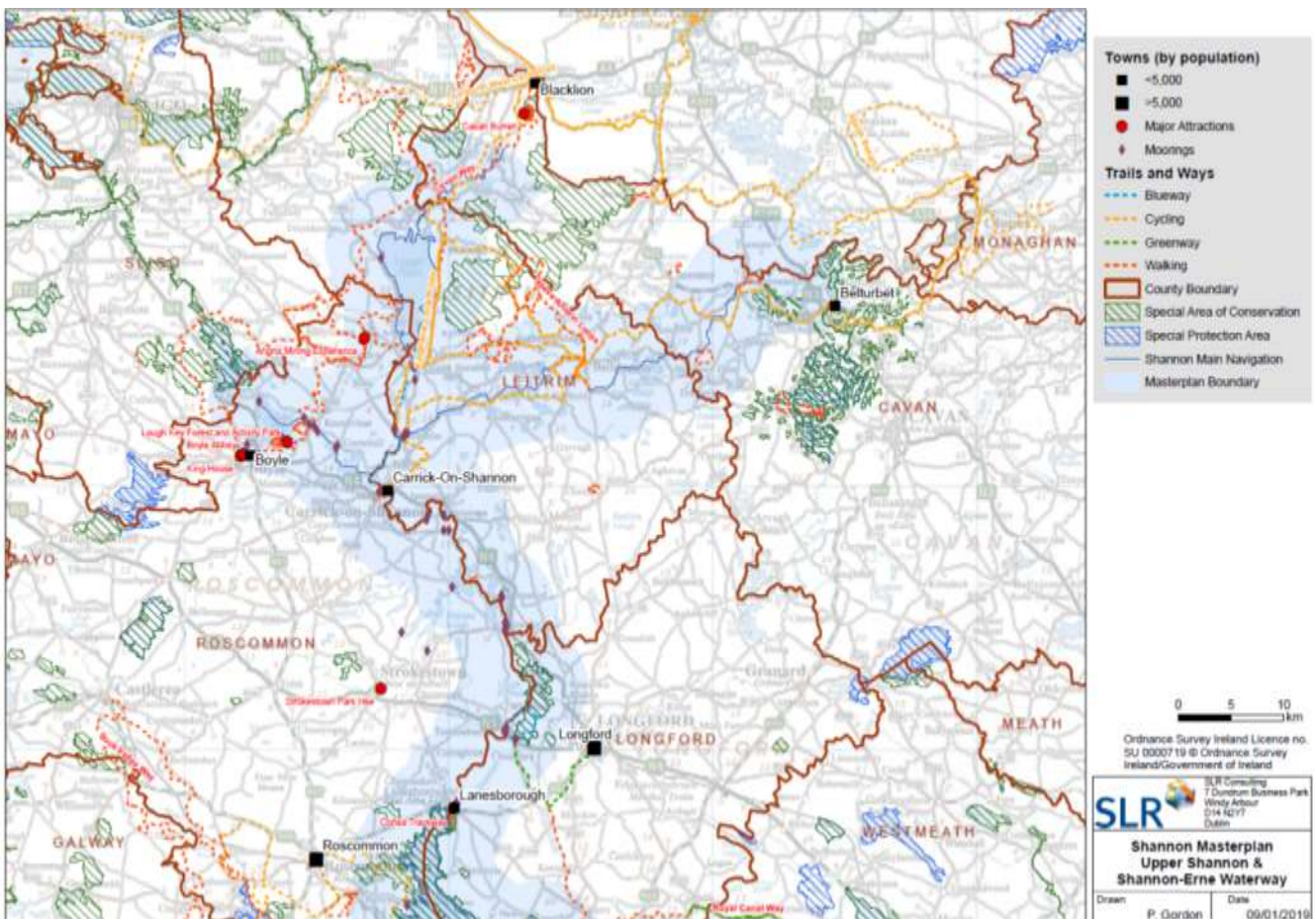


Figure 10 Upper Shannon Sub-Region & outdoor tourism infrastructure

### 7.1.1 Previous Studies

#### North Shannon and Shannon Erne Waterway Catchment Recreation, Tourism and Economic Product Identification Study (Scott Wilson, 2010)

This study report was commissioned by Waterways Ireland in conjunction with Fáilte Ireland, Longford, Leitrim, Roscommon, Cavan and Monaghan County Councils as well as Fermanagh District Council. The study focus is on identifying the recreational and tourism potential within the North Shannon and Shannon-Erne Waterway Catchment within the context of the recently launched tourism marketing initiative; Ireland's 'Lakelands and Inland Waterways'.

This development studies took several guiding objectives into consideration initially namely:

- To **build on existing activities and services** and develop new businesses and services to produce and bring forward a comprehensive set of active holiday products
- To **improve the function of settlements around the lakes and rivers** as tourism destinations from land or water
- To **develop master plans to improve the function**, capacity and sustainability of some settlements to service water recreation and tourism
- To develop a comprehensive system of visitor trails for walking, cycling, riding and canoeing in the areas
- Encourage the development of more opportunities for visitors to enjoy and learn more about the natural beauty, wildlife and heritage of the areas
- To provide and promote products featuring the natural beauty and heritage of the areas
- Enhance the area's reputation and visibility and capacity to provide active holiday packages
- Increase the opportunities for visitors to engage in activities on land or water
- To provide a document that guides the partners in developing tourism and recreation opportunities.

### 7.1.2 Schedule of Capital Projects

## 7.2 Lough Ree & Mid Shannon

The Lough Ree and Mid Shannon area is steeped in history and surrounded by a variety of natural landscapes (Figure 11).

Lough Ree is 32 kilometres long and lays claim to be the geographical centre of Ireland. The hills of Sliabh Bawn in the northwest overlook Lough Ree and its many islands, which were home to early Christian monks and inhabited by local families until the recent past.

Overlooking the inner lakes in the southeast of Lough Ree are the environs of Glasson. In its southern narrows lies the regional centre of Athlone.

The Mid Shannon area also accommodates the Shannon Callows, a seasonally flooded and ecologically significant area at this low point of the river. The callows are host to a number of resident, passerine and migrant bird species and the entire waterway in this region is designated as a Special Protection Area (SPA) under the Birds Directive.

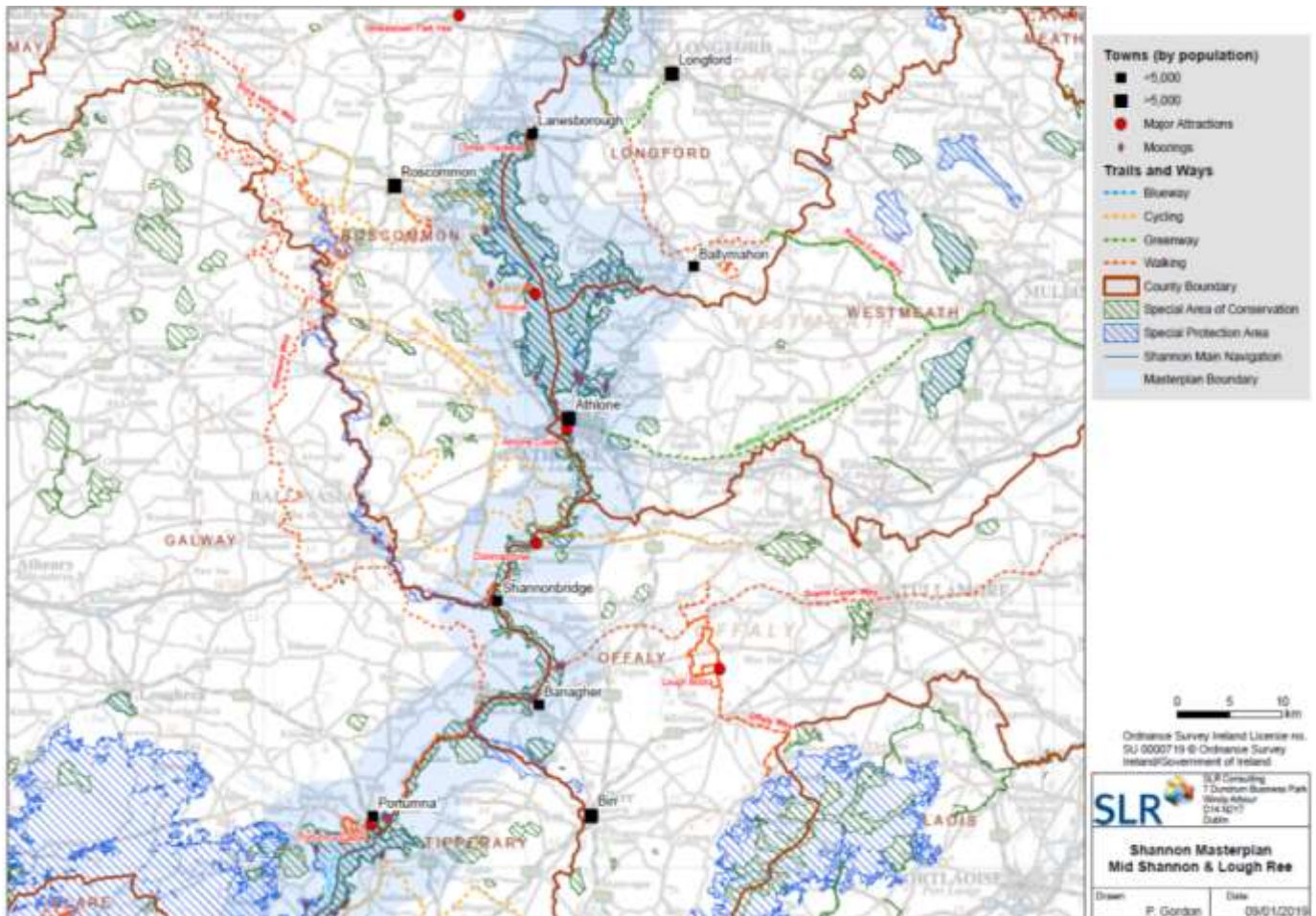


Figure 11 Lough Ree, Mid Shannon Sub-Region & outdoor tourism infrastructure

## 7.2.1 Previous Studies

### Mid-Shannon & Lough Ree Project Development Study (2010)

This study was prepared by Scott Wilson (on behalf of Fáilte Ireland and Waterways Ireland) with Tipperary, Offaly, Galway, Roscommon, Westmeath, Longford CoCos, Shannon Development, NPWS.

Aim of study to provide recommendations for tourism authorities, waterway managers, LAs and funders. via sustainable approach to development, management and promotion of recreation & tourism in MS-LR

- Sub-region is **underdeveloped, primarily attracting specialist visitors for cruise boating and game and coarse angling**. Also popular with Irish people who own boats, fish, and lightly used walking opportunities.
- **Overseas visitors tend mainly to pass through** the area on route to the west coast / festivals /summer schools.
- Cruising market declined but number of boats has grown due to domestic boat ownership.

Principal tourism needs for MS-LR are:

- **Strong products to attract higher volume overseas sightseer** and culture seeker market and encourage overnight stays by this market in the area.
- Strongest potential products are considered to be the Christian heritage of the area and the range of castles, historic houses and gardens.

- **More access to water activities and develop activity visitor services around activity hubs.**
- More opportunities to experience trips on the waterway, including a **regular waterbus service.**
- **Draw attention to the natural heritage** of the area and provide sustainable opportunities to appreciate wetland bird assemblages and natural /cultural heritage of Ireland's bogs.
- **Draw attention to and interpret the special landscapes** of the area through appropriate landscape designations and programmes (e.g. World Heritage Site status for Clonmacnoise and Special Amenity Area Order or a higher designation for Lough Ree).

#### **Recommendations:**

- Historic Houses Trail
- Waterbus transport
- Activity hubs in settlements
- Canoe Trail
- Walk/Cycle trails from activity hubs
- Christian Heritage Trail centred at Clonmacnoise (& UNESCO WHS listing)
- Wildlife/ Wetlands hub
- Activity Info Promotion of the LR-MS region
- Settlement opportunities
- Amenity Sites (views/ stopping points)
- Public Art in hubs promoting nature

#### **Spirit Level (Dec. 2017) Wet and Wild Lands: A Shared Ambition (multi agency)**

**Project Proponents:** Westmeath, Offaly, Longford, Roscommon County Councils, working in partnership with Waterways Ireland, NPWS, Fáilte Ireland, Bord na Móna

The shared ambition is to renew and connect the blue and green wild places of Lough Ree and the Mid-Shannon and to activate the potential of these places for people's livelihoods, the visitor economy, ecosystem services and for new types of employment. This document is not a set plan or a strategy, but the outcome of a process to bring together the individual work of steering group members to enable collaboration and identify possibilities.

This shared vision does not permit, authorise or promote any changes in land use, activities or the level of activity on or around Lough Ree and the Mid Shannon. It should be noted that no environmental assessment, inclusive of Appropriate Assessment (AA), was carried out as part of this vision plan. The following priorities were highlighted:

- A focus on Lough Ree **islands, inner lakes and peninsulas**
- A focus on Mid-Shannon and Lough Ree **wild places**
- Charting the way forward - **moving from shared ambition to strategy**

#### **A Focus on Lough Ree Islands, Inner Lakes and Peninsulas**

The islands offer a distinctive experience on Lough Ree. Following appraisal in terms of navigation, environmental capacity, heritage interest and social benefits, three islands emerge as being potentially suitable for managed visitor access.

- **Inchcleraun / Quaker Island**, with visitors potentially disembarking from Portrun, Lanesborough
- **Hare Island**, with visitors potentially disembarking from Hodson Bay, Athlone, Portlick
- **Inchmore**, with visitors potentially disembarking from Hodson Bay, Coosan Point, Portlick

Access could involve arriving at single offshore mooring point, and then transfer to a smaller boat if necessary, to access the island. Interpretation could be provided by gillies and guides, structures on the

islands could be kept to an absolute minimum. The experience could be low key, quiet, evocative and personal.

The "nooks and crannies" of Lough Ree also provide great opportunities for carefully managed access – the inner lakes and their relationship with Glasson, the peninsulas of Rindoon, St. John's Wood and Portlick and the community-led trails at Kiltewan bog which runs down to the lakeshore.

A Blue and Green infrastructure approach to balancing economic opportunity and caring for this asset by strategically re-wilding state lands and connections aligns with a broad range of international, national, regional and local policy objectives. Further engagement, research and mapping are required.

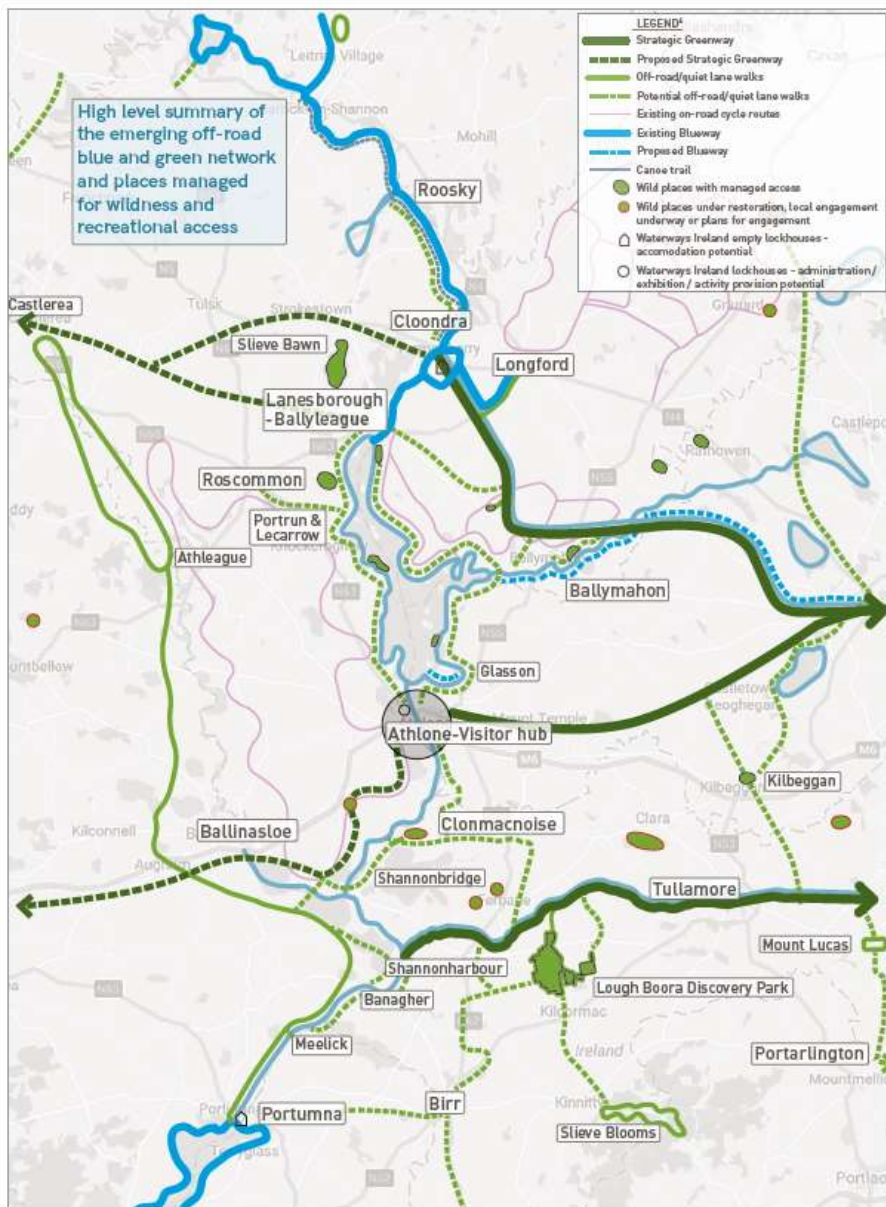


Figure 12 Wet & Wild Vision for the Mid-Shannon – Green Infrastructure



Figure 13 *Wet & Wild* Vision for the Mid-Shannon – Focus on Lough Ree’s Islands and Inner Lakes

## 7.3 Lough Derg and the Lower Shannon

Lough Derg and the Lower Shannon are set in beautiful countryside, encompassing an attractive blend of mountain and lakeshore, woodlands and farms. It is bookended by Portumna in the north and Killaloe-Ballina in the south, each offering a range accommodation, activities and visitor services. Covering 32,000 acres of waterway, Lough Derg is ideal for all kinds of water sports, cruising and angling, as well as excellent walking and cycling facilities, supported by visitor services in picturesque villages such as Terryglass, Dromineer, Garrykennedy, Mountshannon, Killaloe and Ballina (Figure 14).

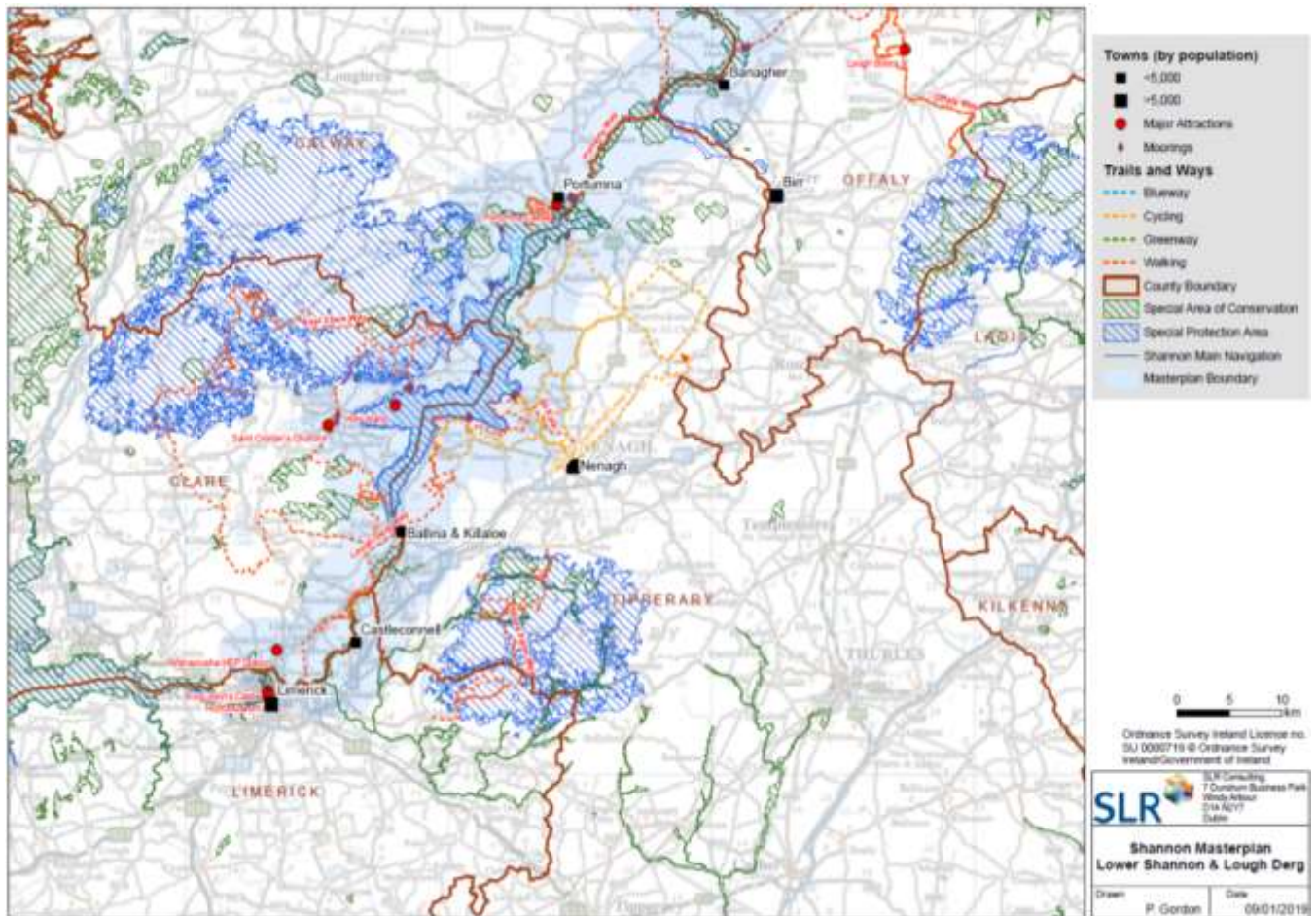


Figure 14 Lough Derg, Lower Shannon Sub-Region & outdoor tourism infrastructure

### 7.3.1 Previous Studies

#### Lough Derg Road Map 2014-2017

A three-year destination and marketing plan prepared on behalf of the Lough Derg Marketing Group. The Plan received over 2 million euro worth of funding and benefitted from specific resources in the form of a dedicated support from a tourism officer. The 2019 -2022 destination plan is currently being prepared and the project team is liaising with the relevant consultant team in this regard.

#### The Inis Cealtra Visitor Management and Sustainable Tourism Development Plan, July 1017

Holy Island or Inis Cealtra is a 20-hectare (50-acre) island located in Scariff Bay in the south-west part of Lough Derg between County Clare and County Galway and is one of the key attractions within this sub region. A management plan was commissioned by Clare County Council, with the remit to seek to ensure

the long-term conservation of this significant historical and cultural site, while expanding its attractiveness as a sustainable tourist destination for an increased number of visitors. The village closest to the island is Mountshannon in Co. Clare, and boat access is available from both the village marina, which lies 2km from the island, and from Knockaphort Pier on the shore near the island (1km away), as shown in Figure 15.



Figure 15 Location of Inis Cealtra, in the context of surrounding villages

The recommendations as set out in the Iniscealtra Management Plan are that

1. Visitor numbers can, and should, be increased to bring more tourism, and socioeconomic benefits, to the local region.
2. There is capacity to increase the numbers of visitors significantly, while ensuring protection of the built and natural heritage of the island within the context of a number of management strategies and new facilities.
3. The rich heritage and history of the site is of such importance that it justifies broadening access to it for more visitors. It is important that such a significant example of our cultural heritage will be shared beyond those currently familiar with it.
4. In order to increase visitor numbers, specific amenities must be provided to allow effective management of such growth in numbers.
5. A visitor facility is required as a gateway to receive, inform and filter access to the island. This should comprise high quality facilities for visitors. Without significant investment in such a facility, the island cannot withstand the impact of increased visitor numbers, nor could the whole experience be considered to be of the quality expected of comparable historical site destinations nationally and internationally.
6. Some new facilities to enhance the visitor experience, provide ease of access, safety and information on the island's heritage, will be needed on the island. These will be the minimum facilities necessary to allow the growth of visitor numbers that a site of such cultural value deserves and could absorb. However, to preserve the authenticity and ambience of the island, more elaborate facilities will have to be provided off site. Having considered a number of alternatives, **it is regarded that Mountshannon is the most fitting location to receive and manage a new visitor centre**; it is the lakeshore village closest to the island, has a deep cultural

connection to it and has enough infrastructure potential to accommodate an increase in visitors.

There are a series of Specific Objectives which provide detail on the overall management approach. In relation to visitor numbers, Objective 2 states

**‘To restrict access to the island to a maximum number at any one time of 100 persons (excluding guides and staff), no more than 400 in any day and a maximum of 45,000 over the course of the year.** These numbers should be taken as the maximum number of persons arriving on the island for all subsequent studies, projections, models and projects.’

In terms of the visitor experience and interpretation, it states

- To develop **an interpretative approach that focuses on the heritage of Inis Cealtra and endeavours to broaden visitor interest to also encompass other important heritage sites in the region**, and to have this holistic focus reflected in all interpretative activities of the Plan. **Objective 15**
- To develop a comprehensive presentation and communication strategy grounded in the human interaction of guides rather than signage (on the island) and relying on both traditional and modern means and technologies (at the visitor centre), **Objective 16.**

## 8.0 Masterplan Consultations

### 8.1 Working/ Steering Group

Formal meetings were held throughout the development of the Shannon Masterplan with the project Working Group, comprising representatives of Waterways Ireland and Fáilte Ireland. Additional consultations and feedback were held with the Steering Group, comprising representatives of the Working Group and representatives of the ten Local Authorities that are adjacent to the Shannon and Shannon and Shannon Erne Waterway.

### 8.2 Consultations

A range of key consultations were held with the executive teams (CEO, Directors of Services) of each of the ten counties adjacent to the Shannon in late 2018. Additionally, consultations were held with the various statutory bodies, responsible for aspects of the management of the Shannon and Shannon Erne Waterway, including: Waterways Ireland, Fáilte Ireland, NPWS, EPA, OPW, National Monuments Service and ESB. Electronic communications were held with the Inland Fisheries Ireland, Coillte and Bord na Mona. Additional consultations were held with Irish Boat Rental Association (IBRA), Inland Waterways Association of Ireland and a number of other NGOs.

Consultations were held with tourism and heritage officers in each local authority through workshops.

Workshops commenced in November 2018 and continued with tourism trade and SMEs in a series of sub-regional workshops in late January 2019. Community representatives, tourism activity and service providers were consulted through the thematic framework workshops, with follow-on consultations with individuals and groups.

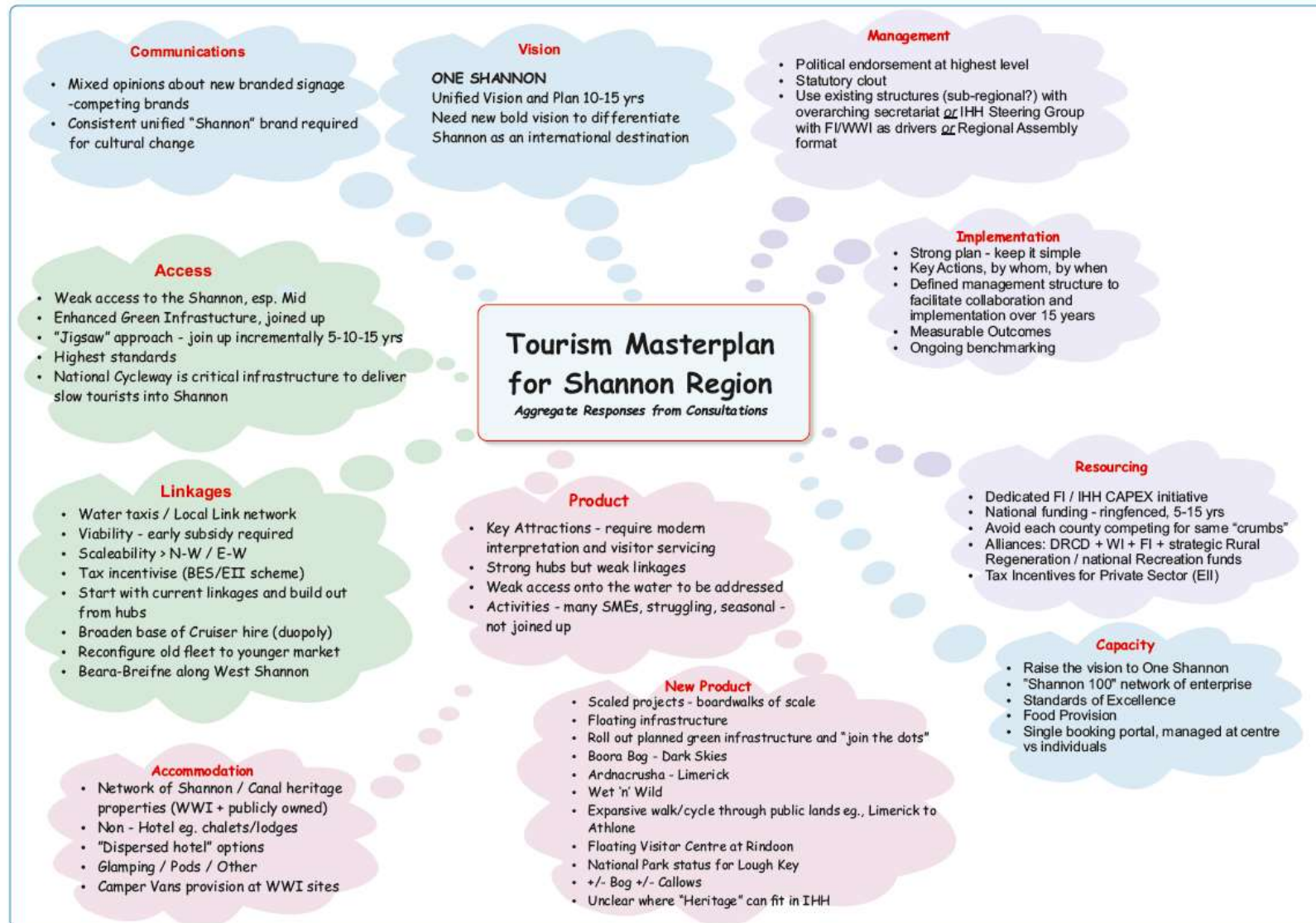
### 8.3 Summary of consultations

All consultations were noted in the course of the Study.

Responses were aggregated to provide an overview of the key issues and responses received (Figure 16 below)

These responses were analysed in further detail to provide inputs to the development of the strategic initiatives in the Masterplan (Volume 2).

Figure 16 Aggregation of Key Consultation Responses by Type to Date (Jan 2019)



## 8.4 Thematic Workshop

The Thematic Workshop on the 29<sup>th</sup> November 2018 attracted 29 people. They represented all parts of the Shannon and a wide range of interests, with tourism, archaeology, wildlife, folklore, history and river-based recreation being particularly well-represented (see Participant Interests document).

During the workshop the participants discussed the special and distinctive qualities of the Shannon in depth. These deliberations focused on six provisional thematic areas that had been derived from discussions with the consultant team and the client Working Group. The goal of the workshop was to test and refine these six themes and, if possible, reduce the number.

The provisional themes were (See Section 5 'Initial Themes for the Thematic Workshop'):

- The Living Shannon
- Shannon routes, crossings and meetings
- The Timeless Shannon
- Wellspring of Early Christianity
- People of the River Shannon
- The Shannon, mighty river of Ireland

### 8.4.1 Review of themes: Stage 1

The workshop tested how far the provisional themes aligned with participants' sense of what was special and distinctive about the Shannon.

This raw data showed:

- an extremely good match – of 200 responses all but three fitted this provisional thematic framework
- all the provisional themes had traction – i.e. they all attracted good numbers of responses

These results were reported to the Project Steering Group on November 30 who responded warmly to the six provisional themes. They said these expressed the Shannon accurately.

### Outcome

The conclusion from this stage is that the provisional themes are essentially correct and there is nothing missing. This indicates that they could be refined and streamlined but should not be profoundly altered.

### 8.4.2 Review of themes: Stage 2

The workshop outputs were scrutinised for overlap and duplication between the themes and the comparative strength of responses. Responses that suggest strong themes are specific to the Shannon, diverse, place-based and/or detailed. Responses that indicate weaker themes are fewer and more generic (e.g. 'culture', 'history', 'nature').

In a group exercise of this type the difference between strong and weak responses can indicate the topics that people are most motivated by i.e. the ones that they are most interested to talk about. This suggests a stronger basis for developing tourism products.

Our analysis of participants' interests suggested that the weaker responses in the workshop were not usually due to under-representation of knowledge areas.

This exercise showed:

- Responses for The Timeless Shannon, Shannon routes, crossings and meetings, and the landscape and activity elements of The Living Shannon were particularly strong and substantial. This suggests these are the strongest themes.
- The Wellspring of Early Christianity is strong, but more limited in scope. Many of the responses here were duplicates from elsewhere. This suggests this is a sub-theme, probably of Shannon routes, crossings and meeting).
- The responses on the nature and biodiversity aspects of The Living Shannon were non-specific. There was wildlife expertise in the room so this suggests that this may not be a strong theme. It would be helpful to talk to a specialist to explore this further.
- Similarly, the responses on People of the Shannon were few and generic e.g. 'craft', 'heritage', 'traditional culture and beliefs'. In this case it could be that people in the room did not know enough about the topic. Alternatively, it may be that this area is not particularly locally distinctive, or that local people do not recognise it or that they do not want to talk about it. A theme that relates directly to contemporary life on the Shannon is vital for the Tourism Masterplan so it will be important to explore this further at the local workshops.
- The importance of the islands and the stories came out strongly and was mentioned in several of themes. This suggests this is an under-told story that participants would like to see highlighted more. We need more information on these stories.
- The scale of the river and its status as the longest in the British Isles was emphasised in several of the themes. This has also been highlighted in many of our conversations. It seems resonant; this scale seems symbolic as well as geographic. This is a core idea around which people unite.

These considerations will feed into the re-drafting of the themes.

### 8.4.3 Parting shots

The workshop concluded with a parting shots exercise. This allows the participants who have spent the previous few hours in tightly structured group conversations to make an individual comment about any aspect of the Tourism Masterplanning. It is an important technique for ascertaining concerns that people may not wish to express in the group. The results are in the Parting Shots Responses document.

The striking thing about the results of this exercise from this group, when compared with many other workshop groups in a wide range of situations, is the consistency of the responses. Over 40% (12 out of 29) of respondents choose to emphasise the importance of sustainable development and the importance of conserving the natural environment of the Shannon. This will inform many aspects of the Masterplan and suggests theming around the value of the natural environment is important.

The other responses from this exercise focused on improved access and infrastructure (8 out of 29 responses) and the need for local people to be involved in the development of tourism and to benefit from it (6 out of 29 responses).

## 9.0 Funding and Delivery Options

The capacity to implement masterplan strategy is a key consideration for the plan and possible delivery options should be considered from the outset so that the plan can be structured accordingly. There are a number of ways to achieve implementation and the approach should be multifaceted to secure optimal outcomes and agreed targets.

- Recommendations embedded in Statutory Plans, RSES and County Development Plans
- Clearly defined Leadership through lead agency
- Dedicated, coordinated, strategic management structure, with clear responsibilities
- Sustained CAPEX funding & resourcing into the medium term (10-15 years)
- Coordinated data collection between FI and WI
- Organisational capacity
- Business capacity
- Community capacity
- Design and place making skills

### 9.1 Funding and Resourcing of the Masterplan

The masterplan will require significant and committed resources to deliver the objectives over the ten-year period from 2020 – 2030.

There are multiple funds opened on a yearly basis, which could contribute, if planned and applied for collectively across a number of counties. The utilisation of available funding sources, suited to specific projects/ sectors (tourism, heritage, marketing, enterprises networking, capacity building, community etc) will enable agencies, tourism enterprises and communities to proactively target measures to contribute to the delivery of the vision and objectives of the Shannon Tourism Masterplan.

#### 9.1.1 Specific Enterprise Supports

The following have been identified as potential supports for specific aspects of development (e.g. entrepreneurialism, training, enterprise networking, financing, management, human resourcing and marketing) – see Table 17 below.

**Table 17 Potential Supports for Shannon Enterprise Development**

Type of Funding/ Support	Potential Funding/ Support
<b>Enterprise Development</b>	<p><b>Local Enterprise Offices (LEOs)</b> are located in each county within the Shannon masterplan region, as a one-stop-shop for enterprise development and support, linked to a network of LEOs and Enterprise Ireland.</p> <p>LEOs offer a range of supports to developing companies that may be suitable for enterprise development, training and networking to advance the Shannon 100.</p>
<p><b>Enterprise Networking</b></p> <p><i>Skillnets</i><sup>14</sup> actively work with businesses to address their skills needs, recognising that training and up-skilling are key elements of business competitiveness.</p> <p>Skill Requirements</p>	<p>Skillnets funds groups of companies in the same region/sector, and with similar training needs, through training networks that deliver subsidised training to businesses. Specifically, Skillnets provides the following range of activities:</p> <ul style="list-style-type: none"> <li>• <b>Training Networks Programme (TNP):</b> fund training networks which operate on a national, sectoral or regional level to provide enterprise-led training supports to businesses. A Skillnets training network may benefit from subsidised training that is relevant to specific needs and delivered flexibly.</li> <li>• <b>ManagementWorks Programme,</b> Skillnets provides subsidised management development training and mentoring available to businesses across all sectors to assist growth in sales, output and employment.</li> <li>• The <b>Finance4Growth</b> programme provides owner-managers of SMEs access to an SME Finance expert who will explain the different and most relevant sources of finance available to their business.</li> <li>• Skillnets also offer a <b>Job-seekers Support Programme</b> which combines training with work-placement to address skill requirements in growth areas</li> </ul>
<b>Business Expansion</b>	<p>The <b>Business Expansion Grant (BEG)</b> will assist a business in its growth phase after an initial 18-month start-up period. BEG grants may be awarded to sole traders, partnerships or limited companies that are located and operating within a LEO area; which has the capacity to expand to become an Enterprise Ireland client; employs up to 10 employees; and is a domestically traded service business with potential to expand internationally. The maximum Business Expansion Grant payable will be 50% of the investment or €150,000, whichever is the lesser. Expenditure may be considered under capital items; salaries; consultancy, innovation, marketing and general overheads.</p>
<b>Management</b>	<p>The <b>Accelerate Management Development</b><sup>15</sup> programme assists in management, leadership, business skills and knowledge to achieve sustainability and growth. It combines learning and mentoring covering the following topics: strategic direction, entrepreneurialism, financial planning &amp; management; marketing, sales and selling techniques, as well as continuous improvement.</p>
<b>Female Entrepreneurs</b>	<p><b>Going for Growth' Female Entrepreneurship Programme</b><sup>16</sup></p> <p>Enterprise Ireland-sponsored programme facilitates mentoring of younger female entrepreneurs, who have been trading for two years or more, by more experienced female entrepreneurs. The focus is on strategic development of their business, rather than on day-to-day operations.</p>

<sup>14</sup> <https://www.localenterprise.ie/Discover-Business-Supports/First-Stop-Shop/Skillnets/>

<sup>15</sup> <https://www.localenterprise.ie/Discover-Business-Supports/Training-Programmes/Accelerate-Management-Development-Programme/>

<sup>16</sup> <https://goingforgrowth.com/about-us/what-is-going-for-growth/>

## 9.2 Financing of Rejuvenation of the Hire Cruise Fleet

The requirement for the rejuvenation of the Shannon cruise hire fleet was discussed in Section 4.5.2 above. The costs of rejuvenation are significant - industry estimates place the cost of a phased replacement of half the fleet (112 boats) over five years at €4.53 million per annum, or €22.64 million in total<sup>17</sup>.

Rental turnover must be raised during a 20-week average annual rental period/ per boat, prior to loan repayments or any accrual of profit to the individual businesses. Without profit there can be no re-investment and no innovation of the basic product.

The Irish Boat Rental Association (IBRA) has considered the potential costs of replacement of the cruise hire fleet, through a combined approach of:

- (i) Grant scheme for a portion of the costs;
- (ii) An incentivised scrappage scheme to take older boats out of the system,

both of which could be linked to the greening of the hire boat fleet. These proposals require detailed examination to determine the optimal solution to the rejuvenation of the Irish cruise hire fleet.

### **(i) Grant Scheme:**

Under the *National Development Plan 2007-2013 Tourism Capital Investment Programme*, a grant-in-aid scheme for boat replacement in Ireland was established. Grants were made available for up to 24.79% of total expenditure and 30% maximum total allowable eligible expenditure. Once the boat reached fifteen years old, the scheme allowed for disposal of the boat into the second-hand market, with the condition that the overall fleet size did not reduce. This regulation in the Irish grant scheme did not apply in Northern Ireland, where the scheme allowed for the direct replacement of a grant assisted boat enabling them to turn over boats at 15 years old maintaining the current fleet size. Northern Ireland has thus maintained a smaller, modern and profitable fleet as a result, that is younger and more competitive than the Irish fleet. No capital grants for boat replacement in Ireland have been available for some years and rules regarding EU State aid have blocked further such supports being emplaced. An alternative may be to utilise development bank finance through a commercial finance scheme at low rates of interest, with e.g. the European Investment Bank (EIB) or European Bank for Reconstruction & Development (EBRD) to structure a long term (10-year) loan system. Various specialist funds, including the 'European Fund for Strategic Investment' could be utilised, but would require the support of the Irish state agencies, as well as industry. All projects financed by the development banks must be 'bankable' and compliant with strict technical, environmental and social standards – this would accord fully with the objectives of the Masterplan.

The objective would be to gradually replace the fleet, removing older boats and renewing it with 'green design' Shannon boats, which may require a change in design to optimise battery/ solar/ electric or hybrid powered Shannon-ready models.

The *National Development Plan 2018-2027* prioritises projects that will underpin the National Planning Framework as part of Project Ireland 2040. There may be scope under the strategic objectives of the Tourism Masterplan to revitalise such a co-funded Capital Grants scheme, allowing for state aid rules, under Project 2040. There may also be funding available through the National Climate Action Plan to decarbonise water-based transport, particularly the national cruise hire fleet.

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<sup>17</sup> Thanks to Mr. Steve Conlon of IBRA for background data on the following concepts.

### (ii) Incentivised Scrappage Scheme

A further option is to introduce a scrappage model, offering a grant of €10,000 to remove ten boats per annum over 15 years, from the Shannon fleet, to be replaced by a new (green) boat<sup>18</sup>. This would cost the state €224,000 per annum, for an industry investment of €4.5 million per annum. By 2035, all boats could be phased out of the system, replaced with a highly comfortable, green (as possible) fleet, suited to the expectations of the international customer.

#### Conclusions:

- ✓ Ireland could develop an innovative, fully green cruise hire fleet, which would accord well with an overarching ecological sustainability ethos.
- ✓ Financing issues are complex and require to aligned with national and EU fiscal policy and rules.
- ✓ A detailed study on the viability of key financing options for renewal and greening of the cruise hire fleet is required.

## 9.3 Consideration of Fiscal Incentives to Stimulate Investment

### 9.3.1 Review of Tax Incentives for Investments in SME Enterprises, 2019

Tax incentives are a means of targeted stimulation of investment, to enhance developer or operator return from investments in tourism facilities (Table 18).

#### Fiscal Instruments to support Enterprise

There may be scope for tax reliefs for both start-up and expanding businesses along the Shannon.

**Table 18 Fiscal Instruments to support Shannon Enterprises**

Tax Reliefs for Start Ups in Ireland	Description Sources: <a href="http://www.revenue.ie">www.revenue.ie</a> <a href="https://adataanalyst.com/funding/tax-reliefs-ireland/">https://adataanalyst.com/funding/tax-reliefs-ireland/</a> - access May 2019
<b>Start-up Refunds for Entrepreneurs (SURE)</b>	SURE is a tax relief incentive scheme for those interested in starting a company. Entitled to income tax refund of up to 41% of the capital. Also, depending on the size of the investment, can avail refund of income tax paid over the 6 years prior to the year in which you invest. The minimum investment under the scheme is €250 and the maximum investment is €100,000 per year. A maximum limit on SURE investment is €700,000 as €100,000 may be relieved in previous 6 years and the current year. It is a relief from income tax scheme and not a tax credit. Hence, relief must be claimed up to the extent of your total income in each selected year.
<b>Employment and Investment Incentive (EII)</b>	With SURE, an entrepreneur can qualify for EII to raise funds for start-up from third party investors. It can be a positive approach to source investment from friends and family. EII offers the incentive to investors by ensuring up to 41% tax relief on their total income for a 3-year investment period. There are restrictions regarding the size and location of company to qualify for EII. A company which carries out operations in a “non-assisted” area (Meath, Dublin, Kildare, Wicklow and Cork) must be small or micro-sized enterprise. A company located in rest of the country may be a micro, small or medium-sized enterprise. The minimum investment by an individual is €250 and the maximum of €150,000 per annum in each tax year up to 2020. The entrepreneur can raise a maximum of €2,500,000 in any one-twelfth month period and a lifetime maximum of €10,000,000 using SURE and EII.

<sup>18</sup> The IBRA suggests introducing an ‘end of life’ EoL protocol to remove old boats from the Shannon-SEW system, linked to EU research initiatives in this area.

Tax Reliefs for Start Ups in Ireland	Description Sources: <a href="http://www.revenue.ie">www.revenue.ie</a> <a href="https://adataanalyst.com/funding/tax-reliefs-ireland/">https://adataanalyst.com/funding/tax-reliefs-ireland/</a> - access May 2019
<b>Entrepreneurial Tax Relief</b>	As part of start-up companies' relief an entrepreneur can avail of a 3-year remission from corporate taxation if the company has a tax liability of less than €40,000 per annum. Marginal relief is applied if corporation tax is between €40,000 and €60,000, and no relief is applied to start-ups where corporation tax liability is over €60,000. Since 2013 it may be possible for a start-up company to carry forward any unused relief from the first three years trading. Tax relief for start-up companies also depends on the amount of employer's PRSI paid. This must be a maximum of €5,000 per employee and €40,000 overall. Certain restrictions may apply.
<b>Capital Allowances</b>	Capital allowances are a tax write-off for qualified capital expenditures against profits over a period of time. There is no approved list of qualifying items of expenditure for allowances purposes. An entrepreneur may claim wear and tear allowances at 12.5% per annum for plant and machinery and 4% per annum for industrial buildings. With Energy efficient capital allowance, may claim 100% on energy-efficient equipment within 1 year.
<b>Research and Development (R&amp;D) Tax Credit</b>	R& D tax credit is tax-based incentive. If you are carrying R&D you can get either tax credit of up to 25 percent on your expenditures (both revenue and capital) or receive cash (subjected to certain terms and conditions).

The EIS was originally introduced in the Finance Act 2011 to replace the Business Expansion Scheme (BES) 2007, aimed at encouraging employment and investment in the SME sector. The support scheme was updated by the Irish government in Budget 2019, providing tax breaks for investors in start-ups. Subject to satisfying certain conditions, an investment by a *qualifying individual* in a *qualifying company* will qualify for tax relief at his or her marginal income tax rate<sup>19</sup> for '*relevant trading activities*'.

Of relevance to the Shannon Masterplan, most trading activities are regarded as *relevant trading activities* except for key accommodation-related activities that are excluded from qualifying as *relevant trading activities*:

- operating or managing hotels, guesthouses, self-catering accommodation or comparable establishments or managing property used as a hotel, guest house, self-catering accommodation or comparable establishment.

A "priority package" of measures was due in the Finance Bill 2019 to buttress the EIS scheme, and it appears there has been a tightening of eligibility criteria. SMEs and industry are seeking increased investment limits, particularly to expand the 'entrepreneur relief' provision, which allows for capital gains tax relief for entrepreneurs if, and when, they choose to sell down their stake.

The government extended a three-year corporation tax relief scheme for start-ups until 2021, and announced a €300 million loan scheme for SMEs, with reference to agriculture and food SMEs in Budget 2019

<sup>19</sup> <https://www.eversheds-sutherland.com/documents/international/Ireland/eis-start-ups-flyer.pdf>

### 9.3.2 Review of Geographic based Tax Relief Schemes

Anticipated market demand from tourists is the major determinant of perceived financial return, the primary factor influencing all tourism investment decisions. Where market demand is low, such as significant sections of the Shannon Region, capital appreciation and growth in rental values will be low, and developers and owner operators may look elsewhere for investment opportunities. However, over the lifetime of the Masterplan, catalyst measures and anticipated growth in visitor numbers may make investment more attractive, particularly if linked with dedicated fiscal incentives.

A short review was carried out of geographic-based tax relief schemes

The "**Pilot Tax Relief Scheme for Certain Resort Areas**" (1995-1999) was introduced to "optimise foreign exchange earnings and employment, through developing an environmentally-sensitive tourism" while capitalizing on its "green unspoilt image." The results were controversial, as largely negative with resort developments were emplaced contrary to the relevant County Development Plans in places such as Youghal, Kilkee, Enniscrone and Achill, with insufficient planning or pre-development of basic infrastructure such as water and sewage infrastructure.

**Upper Shannon Rural Renewal Scheme** : In the late 1990s, the Government of the day introduced a rural renewal scheme for long-term investment in the Upper Shannon, including all of Longford and Leitrim, and parts of Roscommon, Cavan and Sligo. Tax relief was available for owner-occupied and rented residential accommodation. Two types of tax relief were available for costs related to construction, refurbishment and conversion of residential property located in these areas.

This scheme, and subsequent modifications to the Upper Shannon scheme, was perceived to have had negative impacts during the 'Celtic Tiger' years with inappropriate housing built in many rural villages, that became synonymous with 'ghost estates' and vacant holiday homes.

#### **Mid Shannon Tourism Investment Scheme (1999)**

The Mid Shannon Tourism Investment Scheme provided tax relief for certain types of tourism development in the Mid-Shannon area and was administered by Shannon Development, in association with Fáilte Ireland.

This review noted that where anticipated market demand is weak, even very substantial tax incentives will not be sufficient to encourage development<sup>20</sup>.

#### **Review of Proposals for Tourism Investment in the Shannon Corridor (2005 proposal)**

Goodbody's, for the Department of Finance and the Revenue Commissioners, undertook reviews of certain tax incentive schemes and tax exemptions during 2005.

Key recommendations included that (i) the costs and benefits of any proposed new tax incentives should be assessed prior to their introduction; and (ii) the beneficiaries of future schemes should be required to provide information to the Revenue that would assist in the costing and assessment of the schemes. The Minister for Finance announced in Budget Statement 2005 that he would be implementing these recommendations as far as appropriate.

A tax incentive scheme was proposed to encourage investment in tourism infrastructure in the Shannon Corridor, excluding hotels and rental accommodation. The initial proposal was to also exclude

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<sup>20</sup> <https://taxpolicy.gov.ie/wp-content/uploads/2011/06/MidShanGoodbody.pdf>

investment in stand-alone pubs, restaurants and retail outlets. The projects hoped for new attractions and facilities for visitors to the regions. The non-exhaustive list of examples included in the original proposal comprised:

- Marinas and mooring/docking etc. facilities
- Leisure centres
- Sport facilities such as equestrian centres, adventure sport facilities, sailing schools;
- Eco-tourism facilities
- Education and cultural tourism facilities including interpretative centres
- Health farms and spas
- Heritage houses and gardens

Some integrated accommodation or bar/café/restaurant facilities with such projects was also foreseen. The scheme was designed to encourage high quality projects that would add to the appeal of the region as a whole, but left the design and choice of projects to the market operators.

The scheme was intended to be administered by Fáilte Ireland or Shannon Development to ensure proper control of the scheme, with a separate certification body that would ensure proposals met pre-established criteria. A project would only qualify for tax relief once it had obtained this certification. The form of the certification body was to be modelled on the Expert Advisory Panel used in the Urban Renewal and Town Renewal Schemes.

*The Goodbody research (2005) revealed the following:*

Fáilte Ireland staff were sceptical of the prospects for new investments to develop extra tourism activity in the Shannon region. They suggested that enhancing cabin cruising on the Shannon River may be viable, but saw limited scope for any other activity on or around the river, such as sailing schools or watersports activity on the lakes, to draw tourists from elsewhere or to generate new tourism. Other locations for such activities in coastal Ireland or elsewhere in Europe were more attractive than the Shannon lakes, such that investments in the Shannon region would be unlikely to succeed.

Fáilte Ireland indicated that the cabin cruiser business on the Shannon may decline “in the near future”. In their analysis, the cruising business competes with similar river cruising offerings on waterways in the UK, France and the eastern Länder of Germany. In 2005, Ireland was considered to be a relatively high cost location compared to these areas. In addition, it was suggested that the fleet of cabin cruisers needed renewal as visitor expectations of comfort were rising. Fáilte Ireland suggested that a system of accelerated capital allowances for investments in new boats would lower the relative costs of providing this service in Ireland and encourage renewal of the fleet.

In addition, they believed that boat users were more demanding in terms of the onshore facilities they expected. Thus, there is a need for more and better hospitality and entertainment facilities for river users in the future. This could best be achieved by integrating activities, restaurant, entertainment and shopping with marinas and moorings along the river. Tax incentives to encourage this type of investment could be useful in preserving and expanding the cabin cruiser sector.

Fáilte Ireland was clear in 2005 that only facilities by the side of the river, or within walking distance of the river, were relevant to users of cabin cruisers. Facilities further away from the river were irrelevant to tourists and would only be used by residents.

*Waterways Ireland*

Waterways Ireland 2005 surveys were geared towards identifying gaps in the free public infrastructure provided by Waterways Ireland. On this basis, the Shannon performed well, particularly compared to some other waterways and offered certain insights on the future development potential:

- significant spare capacity to accommodate cruisers on the Shannon. Approximately four times as many cruisers as currently use the Shannon could be accommodated before usage reached typical levels on waterways in the UK or continental Europe.
- Facilities for river users need constant improvement and upgrading. Tourists on the river constantly demand more and better facilities, and more opportunities for activities on or near the river.
- Facilities within a maximum of three miles of the riverbank are relevant for people on the river.

#### **Conclusions of the Goodbody 2005 Report:**

- The 'Mid Shannon' scheme should apply to large, integrated investments within five miles (8km) of the Shannon as significant, "destination" projects, involving investments well in excess of the proposed €150,000 minimum.
- It should also apply to smaller investment in facilities for river users (cafés, shops, restaurants, activities) within 5km of the river. These, smaller, riverside developments should be subject to a minimum investment size such as €150,000 to ensure cost effective operation of the scheme.
- The scheme rules need to allow investment in large facilities as "destination" facilities such as luxury resorts or health farms that necessarily include accommodation for users.
- It may be useful to extend the scheme to investments in Shannon cruisers, with appropriate safeguards to ensure that the relief is used for boats that are actually used on the Shannon. *However, although concluded, this was not recommended at the time by Goodbodys.*
- As there are only tentative indications of a limited number of potential useful investments, the scheme should only run for a limited time and should be regarded as a pilot.
- The experience with earlier property-based tax incentive schemes .... indicate that it would be useful to have a body or bodies actively promoting the scheme. A separate independent certification body would ensure that only projects that meet the requirements of the scheme would receive tax incentives.

*"In conclusion there appears to be only a limited number of possible tourism projects in the Shannon area which a <tax incentive> scheme could usefully subsidise. Provided that the scope of the scheme is limited to confine it to these investments, as discussed above, then it has the potential to have positive effects." Goodbodys review, 2005*

### **9.3.3 The Future: Fiscal Incentives for the Shannon Region**

#### **Would a new tailored Shannon Fiscal Scheme work now?**

- Firmly aligned with the requirements of the Strategic Initiatives in the Shannon Tourism Masterplan within *Ireland's Hidden Heartlands* development strategy;
- Help to support relevant capital recommendations within the Masterplan;
- Provide vehicle to commission new projects and the rejuvenation of the cruise hire fleet;
- Provide vehicle to address structural inadequacies, particularly accommodation;
- Enterprise capacity building would be a useful platform to promote buy-in to any new scheme.
- The 'labour' aspect of any scheme should not be overlooked: recruitment, training and retention of key staff (especially all year round) is a significant challenge especially for the micro/SME tourism sector in the Shannon Region.
- Given the likely challenges, any proposed scheme needs to be innovative, targeted, time specific, fully measurable and relatively easy to administer.
- The experience with earlier property-based tax incentive schemes, as well as the experience of Shannon Development with promoting successful tourism projects, suggest that it would be useful to have a **defined promotional body** actively promoting the scheme. This would require that there be a separate **independent certification body** to ensure that only projects that meet the requirements of the scheme would receive tax incentives.

## 9.4 SWOT Analysis

Strengths	Weaknesses
<p>The scale and natural characteristics of the River and its surroundings</p> <p>Rich history and heritage of the River as a strategic route</p> <p>Rich biodiversity</p> <p>Active and proud communities</p> <p>Sense of place</p> <p>Shannon is beautiful and rewarding to visit; all seasons</p> <p>Distinctiveness is provided by local pubs, restaurants and accommodation providers. Tidy Towns initiatives have made a notable impact on public realm.</p> <p>Fine restaurants and pubs are clearly a feature as are quality craft producers.</p> <p><i>Clonmacnoise</i> is the key world class heritage attraction on the river..... but at capacity; requires visitor management strategy</p> <p><i>Athlone Castle</i> is also an outstanding heritage attraction that is well interpreted.</p> <p>Plans are afoot to make <i>Holy Island</i> (Lough Derg) a world class experience</p> <p>Expansion of <i>Boora Bog Parklands</i> offering (Dark Skies)</p>	<p>Weak access and linkages.</p> <p>Difficulty in getting on to the water in many sections</p> <p>Low visitor numbers, lack of critical mass.</p> <p>Lack of key elements of accommodation with geographical gaps</p> <p>Poor design - Interface between River and Town / River and built development</p> <p>Lack of visual and physical connection to the River from the towns and villages in many cases.</p> <p>No co-ordinated, Shannon-focused pre-visit information on-line and in print. Nothing that covers the whole length of the Shannon.</p> <p>It is hard to follow the length of the river by car or cycle – few roads run along the river or lough-sides. This would make exploration of the river by road difficult.</p> <p>Hard to find good walks by the river or the loughs. Rindoon was a notable exception and a rare example of a self-guided walk that is well waymarked and interpreted both by audio and well-illustrated panels.</p> <p>Weather makes a difference and there are few indoor options.</p>
Opportunities	Threats
<p>Huge potential for inter-county collaboration in developing the emergent green infrastructure to provide world class walks and cycle ways of scale.</p> <p>Use of public lands adjacent to the river for activities.</p> <p>Broaden the appeal to domestic visitors (seasonality)</p> <p>Need for greater alignment of research and analysis sections of WI and FI and joined-up thinking in relation to data capture and analysis.</p> <p>With 50% of overseas visitors having no access to a car providing an easy to use means of travel is critical.</p> <p>Pike fishing is internationally important on Lough Derg in September/October.</p> <p>Accommodation providers are extremely important sources of local information and advice.</p> <p>Nature-based activities: birdwatching; photography etc while active in nature.</p>	<p>Brexit and impacts on UK markets</p> <p>Lack of political commitment to delivery and resourcing</p> <p>Focus on large capital projects, without attention to design quality, linkages</p> <p>Lack of leadership for implementation of Masterplan.</p>

# APPENDIX 1: ATTRACTIONS REVIEW

*Conducted late 2018 – early 2019*

*By TellTale*

**Attraction: Athlone Castle**

**Date of visit: 30/11/18**

**Notes**

**FIRST IMPRESSIONS**

**BASIC DESCRIPTION**

Impressive castle located at extremely strategic position dominating the river crossing.  
Castle has been renovated and updated to a high standard with very effective interpretative displays.  
A high-quality modern heritage attraction.

**BEGINNING / FIRST IMPRESSIONS**

Good clear signage on the outside of the Castle, followed through into the courtyard  
Welcoming ticket area with small café. Video showing on wall of café about Athlone which includes sailing on River Shannon.  
Great promise of storytelling in café at entrance to exhibition.

**EXHIBITION**

Introductory gallery covering the early settlement of Athlone

This covers:

Discover our early history:

- Prehistoric life
- Early Christians
- Viking attacks
- Dynasties
- Rise of The Ua Conchobairs

This covers quite a lot about the region around Athlone and the River Shannon. It uses a great map /video interactive.

Second gallery : covers

1<sup>st</sup> 490 years

Emphasises strategic importance of Athlone on the Shannon and crossing points

Includes a good kids area – dressing up and build own castle interactives

Long bow and cross bow interactives

Can you capture castle? video game

Third Gallery: Athlone besieged 1690-1

Tells the story of the siege from 3 personal perspectives using audio and powerful portrait illustrations  
 Siege 360-degree AV experience - dramatic AV story telling of the siege  
 To conquer Ireland – audio.  
 This gallery displays some excellent storytelling interpretation.

Fourth Gallery: The fabric of Athlone  
 Tells the more recent history of Athlone.  
 The most relevant elements to the Shannon story are:  
 1840s S Navigation construction of dam and lock at A and new swing bridge allowed river traffic through town for 1<sup>st</sup> time Athlone became an inland port  
 Unfortunately, this gallery is less successful than the previous ones – gives the feeling of the project ‘running out of steam’. Not a very effective ending to the exhibition.

Coming back out through the castle courtyard there is a separate prison area with a very powerful exhibition called **Death and Destruction** – this contains a very dark and powerful audio of a contemporary description the death and suffering during the siege of Athlone

<b>MENTION OF THE SHANNON</b>	
<b>General:</b> There is a lot about the strategic importance of Athlone and the castle as a key crossing point on the River Shannon. There is also a good introduction to the early settlement of this section of the River Shannon. <b>“The Shannon runs through the heart of the story of Athlone”.</b>	
LIVING SHANNON	Only a small amount in passing in gallery 1
ROUTES, CROSSINGS AND MEETINGS	A lot about the strategic importance of Athlone and the castle as a key crossing point on the River Shannon.
TIMELESS	No
WELLSPRING OF EARLY CHRISTIANITY	Yes, in gallery 1
PEOPLE OF THE RIVER	Yes, in relation to the people of the siege – vivid stories.
THE MIGHTY RIVER OF IRELAND	Some – e.g. “In the centre of Ireland on Ireland’s longest river.”
Comments:	
	<b>Y/N</b>
	<b>Notes</b>
<b>FACILITIES</b>	

Cafe	Yes	Small café in entrance ticket area
Coffee / tea machine / making point	cafe	
Shop	Yes, but v small	Very small no of items
Public meeting room	?	
Toilets	Yes	
Public WIFI	Yes	In café only
Public charging points for phones etc.	?	Not obvious
Other / Comments:		

#### INTERPRETIVE MEDIA

	Y/N	Notes
Panels	Yes	Some very good themed panels, excellent bespoke historic illustrations
Audio	Yes	Very good
Audio Visual	Yes	Very good
Artefacts	Yes	
Models	Yes	
Interactives (	Yes	Good examples but largely limited to one gallery
Face-to-face interpretation	No?	Not obvious on my visit
Artworks		excellent bespoke historic illustrations and full-size figures
Other / Comments:		

#### PROVISION FOR VISITORS

##### SUITABILITY FOR TARGET VISITOR SEGMENTS

##### CULTURALLY CURIOUS

Ideally suited to this group – would provide a very satisfying visit conforming to the highest modern standards.

##### GREAT ESCAPERS

Might attract members of this segment with children especially as a visit during bad weather.

##### SOCIAL ENERGISERS

Not many aspects to make this a strong attraction for this group.

<p><b>FAMILIES</b>                  The child-orientated interactives, sound and AV, coupled with the strong use of storytelling interpretation would make this a good visit for ‘learn together’ families.</p>
<p>Other / Comments:</p>

PROVISION FOR INTERNATIONAL VISITORS		
	Y/N	
Foreign language translations	Yes – via portable audio tour available in 6 languages in addition to English – Italian and French are apparently the most used	
Use of non-familiar English (difficult for non-native speakers)	Some	
Evidence of assumed knowledge (e.g. of Irish history/ culture)	Some – needs more of an international timeline comparator	
Good use of words and images together	yes	
Other / Comments:		
PROVISION FOR PEOPLE WITH DISABILITIES		
	Y/N	Notes
Ramps and lifts	Yes	
Disabled toilets	Yes	
Handrails	yes	
Provision for visually impaired: brail, audio trail, readability of text Tap boards etc.	Not obvious	
Provision for hearing impaired: hearing loop, subtitling on audio	Not obvious	
Other / Comments:		

<b>SUMMARY</b>
<b>Highlights</b>
<b>1. Fine fortress in dramatic location in good repair</b> – includes good views of the river from the parapets. They make the most of this dramatic location by using powerful uplighters to illuminate the building at night.
<b>2. High quality modern interpretative exhibition employing some of the best story telling interpretation</b>
<b>3. The AV display in the first gallery about early settlement</b>
<b>4. The wonderfully atmospheric and characterful historic illustrations</b>
<b>5. The surround AV of the siege</b>
<b>Areas that could be improved</b>
<b>1. Provision for disabled especially those with hearing and visual difficulties</b>
<b>2. the interpretation and graphics in the final gallery</b>
<b>3.</b>
<b>Potential for development</b>
<b>This is already a high-class heritage visit. There is some minor room for improvement but compared to many attractions it is already very high quality.</b>

## Attraction: Athlone Castle

Date of visit: 30/11/18



Imposing fortress



controlling the River Shannon



and the main bridge



Clear signage in courtyard



AV in café with sailing on Shannon



Promise of storytelling at entrance to exhibition



Impressive map AV in 1<sup>st</sup> gallery



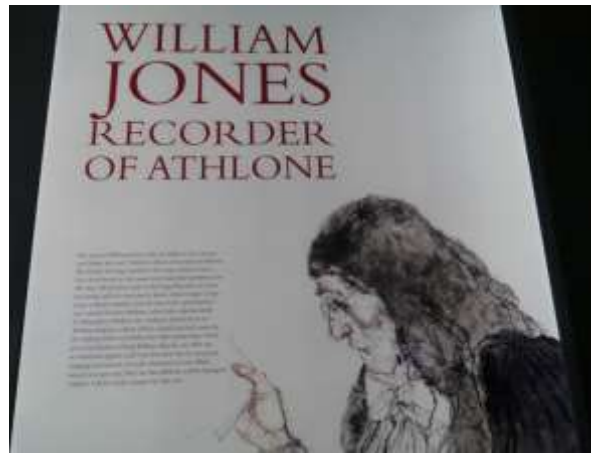
Children's dressing up & interactive games



Compelling bespoke historic illustrations



Gallery about the siege of Athlone



Character led storytelling interpretation



Powerful surround AV about the siege



Great use of contemporary quotes



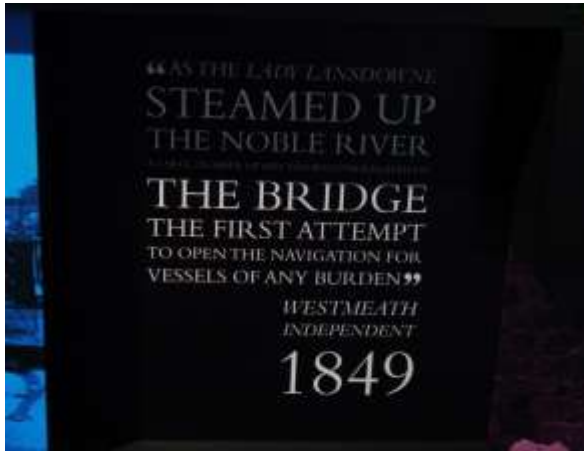
Well positioned panels on parapet



Powerful use of audio to tell of the suffering



Graphic use of sculpted figures



The opening of the navigation mentioned in last



Dramatic night-time lighting

## Attraction Assessment: Clonmacnoise

Date of visit: 05/10 /2018

	Notes
<b>FIRST IMPRESSIONS</b>	
<p><b>BASIC DESCRIPTION</b></p> <p>A stunning early Christian site on the edge of the river- surely a must see' for any visitor to the valley and another gateway to the Shannon. A fantastic world class heritage resource - but the presentation of the visitor experience by OPW is disappointing. It is nonetheless well-visited – there were two parties of German visitors and other nationalities when we visited.</p> <p>The site comprises the original monastic ruins and a separate museum building through which visitors enter the site. The museum contains the original the original sculptures and Celtic crosses from the site and most of the interpretation of the site. There is also a modern Chapel that commemorates the Pope’s visit to Clonmacnoise.</p> <p><b>FIRST IMPRESSIONS</b></p> <p>Car park is rather tatty; maintenance is poor (e.g. old stickers stuck over door) and there is little apparent sense of pride in the place. There is no welcome and no sense of arrival at one of the most important early Christian sites in Europe. The entrance to the site is rather modest and does not build expectations.</p> <p>Attractive sculpture of pilgrim on route from car park to visitor centre. Visitor centre entrance is very low-key ad focusses on opening times etc rather than significance of the site and the experience. It has a strong corporate feel.</p> <p>There is a small dedicated landing facility for boats. Arriving by boat would be a wonderfully atmospheric way of arriving at Clonmacnoise.</p> <p><b>EXHIBITION</b></p> <p>The exhibition included an a-v in a seated theatre and a series of panels accompanying the original artefacts (which are very impressive).</p>	
<b>MENTION OF THE SHANNON</b>	
General -	
LIVING SHANNON	<p>The only mention of the river in the exhibition was one panel about the river and one about the callows/meadows in exhibition space. Neither encourage exploration.</p> <p>The river and its wildlife are a crucial part of the atmosphere and character of Clonmacnoise.</p>
ROUTES, CROSSINGS AND MEETINGS	The audio visual and site leaflet highlight the importance of the Shannon as a major north-south

	routeway and Clonmacnoise as a significant location on the east-west dry morainic ridges. This was therefore an important crossing place hence the selection of site. It was also a departure point for missionaries and a site of pilgrimage.	
TIMELESS	Strong sense of timelessness embedded in the monastic ruins in the context of the Shannon landscape.	
WELLSPRING OF EARLY CHRISTIANITY	This is the key site in Shannon, probably in Ireland, for this theme. It is of huge importance and is the story of the site.	
PEOPLE OF THE RIVER	Not particularly strong other than the Shannon as a routeway and as a wellspring of Christianity (both covered above).	
THE MIGHTY RIVER OF IRELAND	Its size and scale of the river dominates the site and its monastic history.	
<b>Comments: This is the stand-out heritage site on the Shannon and is an integral part of the story and significance of the river.</b>		
<b>FACILITIES</b>		
	<b>Y/N</b>	<b>Notes</b>
Cafe	Yes	Very small, poor. Below modern expected standard for heritage site of this importance.
Coffee / tea machine / making point	No	
Shop	Yes	Small sales point at ticket desk, larger (non OPW) shop (closed) in car park.
Public meeting room	?	
Toilets	Yes	
Public WIFI	?	Not obvious
Public charging points for phones etc.	?	
Other / Comments:		
<b>INTERPRETIVE MEDIA</b>		
	<b>Y/N</b>	<b>Notes</b>
Panels	Y	But dated interpretation techniques
Audio	N	

Audio Visual	Y	Traditional theatre style AV theatre. The AV was quite strong on the relationship between the site and the river.	
Artefacts	Y	Wonderful Celtic crosses and other stone carvings	
Models	Y		
Interactives (	N	None	
Face-to-face interpretation	Y	Timed guided tours available in English and German (at least). More should be on offer throughout the year. We arrived at 2.30pm and could not get on a tour that afternoon.	
Artworks	Y		
The standard of maintenance was poor and did not do justice to the quality of the site and the artefacts. The peeling labels on the panels convey a sense of neglect.			
<b>PROVISION FOR VISITORS</b>			
<b>PROVISION FOR TARGET VISITOR SEGMENTS</b>			
<b>CULTURALLY CURIOUS</b>			
Excellent, although the interpretation could be more clearly layered so that people could find the main points more easily. No participation and very little attempt to engage with visitors.			
<b>GREAT ESCAPERS</b>			
The interpretation is very largely cerebral and may not appeal to Great Escapers but the experience of the site is strong and evocative. The activity level is low. This group's experience would be greatly enhanced by greater experiences e.g. arriving by boat, being able to experience the site at night, performances etc. They may want to bypass the museum.			
<b>SOCIAL ENERGISERS</b>			
Probably unlikely to visit. Certain events could attract them.			
<b>FAMILIES</b>			
The provision for families is minimal and could be considerably improved. The parents need to lead the experience (without much support).			

<b>PROVISION FOR INTERNATIONAL VISITORS</b>	
	<b>Y/N</b>
Foreign language translations	No There is not clear welcome in different languages. No translations on main panels Foreign language leaflets not clearly available
Use of non-familiar English (difficult for non-native speakers)	Yes, in parts of the exhibition text

Evidence of assumed knowledge (e.g. of Irish history/ culture)	Yes, in parts of the exhibition text	
Good use of words and images together	Some e.g. the period style illustration panels in entrance (but text could be better for non-English speakers).	
Other / Comments: The offer for non-English speaking visitors could and should be improved considerably.		
<b>PROVISION FOR PEOPLE WITH DISABILITIES</b>		
	<b>Y/N</b>	<b>Notes</b>
Ramps	Yes	
Disabled toilets	Yes	
Handrails	Yes	
Provision for visually impaired: brail, audio trail, readability of text Tap boards etc.	??	Not evident
Provision for hearing impaired: hearing loop, subtitling on audio	??	Not evident
Other / Comments:		
<b>SUMMARY</b>		
<b>Highlights</b>		
1. Amazing, world class sacred heritage site – one of the great early Christian sites in Europe		
2. Wonderful location on the banks of the River Shannon		
3. Superb collection of original Celtic Crosses and other early Christian carvings		
4. Lovely river side mooring facilities enabling atmospheric access to the site from the river		
<b>Areas that could be improved</b>		
1. The whole arrival experience (signage, car parking, entrance walkway and entrance to visitor centre) is disappointing and shabby. There is no sense of arrival at a special place, no expectation-building.		
2. The visitor centre buildings are drab, underwhelming and small for the number of visitors. They do not have an exciting relationship to the site. Indeed, they tend to detract from the site.		
3. The exhibition is quite dated and distinctively shabby. It does not meet the expected standards of communication for multinational and multi-lingual audience.		
4. The café and catering facilities are too small, and not up to the standard expected by international heritage tourists.		

5. There should be more use of storytelling interpretation. This is a site full of stories, not just historical facts.

**Potential for development**

This site has tremendous potential for improvement. It should be a truly world class heritage / sacred site visit; the jewel in the crown of the Shannon Region and the Hidden Heartlands. At present the approach, car parking, infrastructure, visitor centre buildings, exhibition and café all let it down. None of these are at a standard that would be expected nowadays for a site of this calibre.

**In light of the Shannon Tourism Development Plan, there is great potential for further interpretation / development about the crucial relationship with the River Shannon. There is also great potential for the inclusion of this site in key experience packages for the Shannon.**

Attraction: **Clonmacnoise**

Date of visit: 05/10 /2018



Arrival to car park



Low key entrance from the car park



Sculpture of a pilgrim on entrance path



Institutional signage at Visitor Centre entrance



Interpretation panels using period style illustrations



Visitor Centre Buildings



Orientation panels on path to Sacred site



Visitors leaving visitor centre, approaching site



River Shannon and round tower



Reproduction Celtic crosses



Student visitors enjoying the whispering arch



Shelter used for the Pope's visit



Photos showing the wonderful relationship between the Sacred site and the River Shannon



River Shannon as viewed from site



One of the original Celtic Crosses conserved in the visitor centre

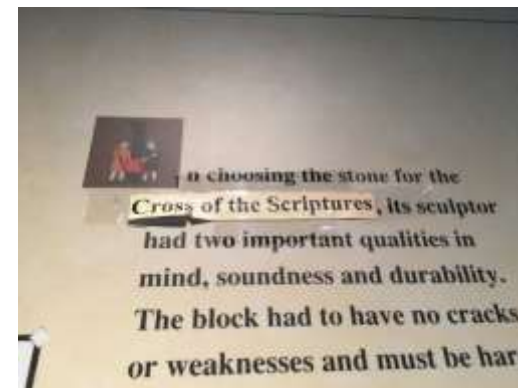




Beautiful Celtic carving



Panel about the river



(Shabby) corrections on exhibition panels



River landing



Great approach to sacred site from river



Strong atmosphere on the river

## ATTRACTION ASSESSMENT : Lough Boora Discovery Park

Date of visit: 02/12/18

### Notes

#### FIRST IMPRESSIONS

##### BASIC DESCRIPTION

Very large site of restored peat workings now forming a mix of wetlands and conifer plantations.

Visitor Centre and Café.

Extensive network of paths and cycle trails.

Extensive sculpture park with sculptures inspired by the history of peat digging on site.

x 2 bird hides

x 2 coarse fishing lakes

Grey partridge conservation area

##### FIRST IMPRESSIONS

Car Park and approach to VC feels like a prestige 'corporate' restoration project – high quality landscape design

All the signage and leaflets have a very 'official' corporate feel to them.

##### VISITOR CENTRE

Unwelcoming exterior to VC.

VC has a few wildlife photos but no obvious interpretation and no message about the objectives of the site or the history.

A temporary pop up 'Panels' Bord na Móna exhibition called heartland. Unfortunate that the 2 biggest photos are of peat extraction machines. No real celebration of the restoration of the site.

4 leaflets on information desk (unmanned at this early time of year) all for Walks:

Family walking and adventure route – fairies

Mesolithic – one of the most important archaeological finds in Irish history – discovered 1977

Sculpture park 24 sculptures

Turaun – cycle route 15km

Finamore walking route 10 or 16 km walk

No wildlife walks or wildlife leaflet Feels like without much spirit or belief.		
LIVING SHANNON	<b>None</b> - but the site has great potential for encouraging engagement with and observation of the natural world	
ROUTES, CROSSINGS AND MEETINGS	<b>None</b>	
TIMELESS	<b>None</b> – but the site has great potential for encouraging contemplation, observation and creativity see below	
WELLSPRING OF EARLY CHRISTIANITY	<b>None</b>	
PEOPLE OF THE RIVER	<b>None per se</b> – but there is a lot about the peat workers who, if the site is in the river catchment are People of the River	
THE MIGHTY RIVER OF IRELAND	<b>None</b> – only the archaeological reference above	
	<b>Y/N</b>	
Cafe	Yes	
Coffee / tea machine / making point	No - cafe	
Shop	A Very small no of items for sale in VC	
Public meeting room	Not obvious	
Toilets	Yes	
Public WIFI	Yes	
Public charging points for phones etc.	Not obvious	
Panels	Yes - external	
Audio	No	

Audio Visual	No	
Artefacts	No	
Models	No	
Interactives	No	
Face-to-face interpretation	Not obvious	
Artworks	Yes	

<b>PROVISION FOR VISITORS</b>
<b>SUITABILITY FOR TARGET VISITOR SEGMENTS</b>
<p><b>CULTURALLY CURIOUS</b>                  The sculpture park and the story of the restoration of the peat diggings.</p>
<p><b>GREAT ESCAPERS</b>                  Especially with the big network of walks and trails combined with the sculptures and bike hire this could be a great place for this group.</p>
<p><b>SOCIAL ENERGISERS</b>                  Bike hire                  The sculpture park trail – I saw two groups of young people going around and interacting with the sculptures (taking selfies, etc.) who fitted this category                  Several good picnic areas</p>
<p><b>FAMILIES</b>                  The only obvious provision at the moment is the fairy trail.                  But considerable scope for other engagement.</p>
<p>Other / Comments:                  The site could be packaged a lot more creatively to make it more attractive to these different groups</p>

<b>PROVISION FOR INTERNATIONAL VISITORS</b>		
	<b>Y/N</b>	
Foreign language translations	No	
Use of non-familiar English (difficult for non-native speakers)	No	
Evidence of assumed knowledge (e.g. of Irish history/ culture)	Yes	
Good use of words and images together	No	
Other / Comments: No particular international welcome.		
<b>PROVISION FOR PEOPLE WITH DISABILITIES</b>		
	<b>Y/N</b>	<b>Notes</b>
Ramps	<b>Yes</b>	
Disabled toilets	<b>?</b>	Not clear from outside
Handrails	<b>Outside VC</b>	
Provision for visually impaired: brail, audio trail, readability of text Tap boards etc.	<b>No</b>	
Provision for hearing impaired: hearing loop, subtitling on audio	<b>Not obvious</b>	
Other / Comments: There is little obvious provision, but much of the site would be adaptable due to being very flat and there being a network of good paths.		
<b>SUMMARY</b>		
<b>Highlights</b>		
<b>1. The sculptures in the landscape</b>		
<b>2. The extensive network of walking and cycling routes</b>		
<b>3. The café and outside deck</b>		
<b>4. The vision of a site that has been ‘restored’ following peat extraction – however this is not really celebrated enough</b>		

<b>Areas that could be improved</b>
<b>1. The visitor welcome</b>
<b>2. Encourage a much greater degree of interaction/engagement for visitors</b> by providing more provocative and engaging interpretation. The sculptures are a great expression of the way that artists have been inspired by the site, but there is no encouragement for visitors to explore their own reactions to the site through exploring their own creativity (through, writing, photography drawing, painting, sculpture movement, etc.)
<b>3. The interpretation</b> – it is very old fashioned and formal. It needs a thematic approach and a more visitor-friendly style and much greater variety of media. The sculptures are actually a dynamic form of interpretation, but they are treated much more like exhibits. There is no interpretation, species sightings, etc. in the bird watching hides.
<b>4. A clearer family offer</b> – This could be a really great place for families if more thought is given to creating family-orientated materials e.g. family adventure back packs for hire
<b>5. Visitor Centre needs a clear introduction to what the place is about what it is trying to achieve and what can visitors do there.</b> The introduction to the sculpture project only appears at the pavilion – well into the site visit and many visitors could miss this altogether.
<b>6. Some of the sculptures are beginning to feel tired</b> – it would be good to have a rolling programme for the creation of new sculptures. At present the sculptures are almost all inspired by the history of peat extraction. It would be great if a new generation of sculptures could be inspired by the flora and fauna that has since colonised the site and the visitors who enjoy it.
<b>Potential for development</b>
This is a great place for physical exploration, but it could become a great place for encouraging visitors to explore their own creativity. See above. The site now offers great opportunities for engaging with nature (bird watching, botanising, looking for invertebrates, etc). This should be encouraged more. The site could be packaged a lot more creatively to make it more attractive to the different target visitor groups. Much more could be made of the archaeological site – potential for reconstruction of encampment etc. Interactive discovery options? The site has great potential for development for families. See above. Could be made a lot more friendly for international visitors.

## Attraction: Lough Boora Discovery Park

Date of visit: 02/12/18



Arrival



Approach to visitor centre



Orientation panel



Exterior of visitor centre



Café and reception desk



Outdoor deck for café overlooking lake



View of one of the restored lake



Network of good paths



Dramatic sculptures



Sculptures inspired by the history of peat digging are scattered through the first section of the site forming a compelling sculpture park



Much of the site is conifer plantation



the pavilion



Fairy trail for children



Traditional formal interpretation panels



Archaeological panel

## ATTRACTION ASSESSMENT : Lough Key Forest Park

Date of visit: 03/12/18

		Notes
<b>FIRST IMPRESSIONS</b>		
<p><b>BASIC DESCRIPTION</b></p> <p>Has the feel of a large country park situated around the beautiful Lough Key. Developed on the site of a big country house that is no longer there (burnt down).</p> <p>Large visitor centre and café with large indoor facilities</p> <p>Large interactive challenge experience in the Visitor Centre</p> <p>Tree canopy walk along portion of the Lough shore</p> <p>Big adventure rope experience</p> <p>Original servants tunnel leading to large Viewing tower on the site of the old mansion, providing wonderful views out over Lough key and the surrounding landscape.</p> <p>Extensive network of walks and trails</p> <p>Cycle hire during the season.</p> <p>Events programme</p> <p>Very large car parks (which apparently get completely full at busy times of year)</p> <p>Large and impressive boat moorings in beautiful location with toilet and shower facilities.</p> <p>NB there is a navigable connection between Lough Key and the rest of the River Shannon network</p> <p>NB The visitor centre and associated facilities were closed at the time of visit. Consequently, unable to make a full assessment of the site as it would be experienced by a visitor during the season. For instance, it was unclear from my visit whether visitors could hire boats etc to get out onto the water.</p>		
<b>MENTION OF THE SHANNON</b>		
<p>General: There appeared to be little information about the River Shannon as opposed to Lough Key. But this was very difficult to assess on from this quick out of season visit.</p>		
<b>FACILITIES</b>		
	<b>Y/N</b>	<b>Notes</b>
Cafe	Yes	Very large cafe
Coffee / tea machine / making point	cafe	

Shop	Yes	
Public meeting room	Yes?	
Toilets	Yes	
Public WIFI	?	
Public charging points for phones etc.	?	
Panels	Yes	
Audio	Yes	
Audio Visual	?	
Artefacts	No	
Models	No	
Interactives	Yes	
Face-to-face interpretation	?	
Artworks	None obvious	
<b>PROVISION FOR VISITORS</b>		
<b>SUITABILITY FOR THE TARGET VISITOR SEGMENTS</b>		
<b>CULTURALLY CURIOUS</b> The whole Lough shore experience. The servants' tunnels and viewing tower		
<b>GREAT ESCAPERS</b> The extensive network of trails with bike hire provide lots of opportunities for self-lead exploration and adventure, as does the Lough, if it is accessible. The tree canopy walk and the tree top rope experience provide great opportunities for adventure.		
<b>SOCIAL ENERGISERS</b> The tree canopy walk, tree top rope experience, the viewing tower, and the interactive challenge experience all provide opportunities for this segment of visitors. If boat hire is available, then the water would too.		
<b>FAMILIES</b> Almost all of the above could be attractive to families and there are numerous opportunities for making specific provision for families to enjoy these facilities (I was unable to assess whether these have been developed or not).		

<b>Other / Comments:</b> The large café and the various picnic and barbeque areas mean that there are good opportunities for visitors of all groups to spend time socialising with their visiting group		
<b>PROVISION FOR INTERNATIONAL VISITORS</b>		
	<b>Y/N</b>	
Foreign language translations	Yes (for the audio tour)	Unclear what other provision there is
Use of non-familiar English (difficult for non-native speakers)	?	
Evidence of assumed knowledge (e.g. of Irish history/ culture)	?	
Good use of words and images together	?	
Other / Comments: <i>inadequate time to assess this</i>		
<b>PROVISION FOR PEOPLE WITH DISABILITIES</b>		
	<b>Y/N</b>	<b>Notes</b>
Ramps	Yes	
Disabled toilets	Yes	
Handrails	Yes	Around the visitor centre and tree canopy walk
Provision for visually impaired: brail, audio trail, readability of text Tap boards etc.	None obvious	
Provision for hearing impaired: hearing loop, subtitling on audio	Not obvious	
Other / Comments:		
<b>SUMMARY</b>		
<b>Highlights</b>		
1. The stunning shore side location on Lough Key		
2. The viewing tower and tree canopy walk		
3. The tree top rope adventure and the indoor challenge area		
4. The extensive network of walks and trails		
5. Cycle hire (boat hire if available!)		
<b>Areas that could be improved</b>		
1. Hard to assess with the nature of my visit		
2. The relationship between Lough Key and the River Shannon could be explained more fully (e.g. there was no toposcope on top of the viewing tower so I had		

to ask the member of staff who was showing me around to point out where the main river is in the landscape and where the navigable connection goes.

**Potential for development**

Probably the relationship between Lough Key and the River Shannon. See above.

Photos overleaf....

## Attraction: Lough Key

Date and time of visit: 03/12/18



Beautiful location next to Lough Key



Very tranquil



Attractive mooring facilities



Large purpose-built visitor centre



Overlooking the Lough



Big café/restaurant



Audio guide (multi-lingual)



Audio trail



Entrance to the old servants' tunnels



The viewing tower



providing stunning views over Lough Key



and the surrounding landscape



Raised walkway along edge of lough



getting visitors up into the tree canopy



Cycle and segway hire



Zipit high wire forest adventure.....





Extensive network of paths and trails



enabling exploration of the estate, lough



and woodlands

**ATTRACTION ASSESSMENT: Strokestown House & National Famine Museum** Date of visit: 01/12/18

<b>Notes</b>
<b>FIRST IMPRESSIONS</b>
<b>MENTION OF THE SHANNON</b>
<p><b>General:</b> Strokestown House is located some considerable distance away from the River Shannon. Even if it is in the River catchment there is no obvious connection for a lay visitor. There are no obvious references to River in the exhibition. Although the issues covered in the exhibition would have been very relevant to the peoples of the Shannon, no direct connections are made.</p>
<p><b>BASIC DESCRIPTION</b></p> <p>A traditional and now rather old-fashioned museum about the Famine. Based around a horde of old records that was discovered at Strokestown House, several of which include letters from the tenants to the landlord pleading for help. It is housed in one of the old outhouses of the Strokestown House</p> <p>The museum contains a lot of important material and many poignant insights about this incredibly tragic subject. However, the display of this material is now so dated that it does not really do justice to it. A visitor would really have to be highly motivated to be patient enough to extract the information. By comparison with modern standards of presentation (for instance the International Museum of Slavery in Liverpool) this exhibition is hard work.</p>
<p><b>BEGINNING</b></p> <p>Very low-key profile on arrival at House. The signs for the National Famine Museum are very much secondary to the house. Shared car park, ticketing café and shop with the House and gardens.</p>
<p><b>EXHIBITION</b></p> <p>This is a 10-room exhibition, each room organised around a different topic.</p> <p>The start has absolutely no impact (visual or written) – the key introduction panel is almost the smallest, most insignificant text in room.</p> <p>The exhibition gets off to a bad start by using a term for the topic of the first room that all but serious historians will be unfamiliar with - Ascendency Life.</p> <p>The overriding impression is of a very text-heavy, topic-led (rather than interpretatively themed) exhibition that you have to mine the key information out of.</p>
<b>MENTION OF THE SHANNON</b>
<p><b>General:</b> Strokestown House is located some considerable distance away from the River Shannon. Even if it is in the River catchment there is no obvious</p>

connection for a lay visitor. There are no obvious references to River in the exhibition. Although the issues covered in the exhibition would have been very relevant to the peoples of the Shannon, no direct connections are made.

**FACILITIES**

	Y/N	Notes
Cafe	Y	
Coffee / tea machine / making point		
Shop	Y	
Public meeting room		
Toilets	Y	
WIFI		
Public WIFI	Y	
Public charging points for phones etc.		
	Y/N	
Panels	Yes	
Audio	Several fixed	
Audio Visual	Yes	x 2 : 1 silent slide show and 1 AV
Artefacts	Yes	
Models	Y	
Interactives	No	
Face-to-face interpretation	None obvious on my visit	
Artworks	some	

**PROVISION FOR VISITORS**

**SUITABILITY FOR TARGET VISITOR SEGMENTS**

General point: Because the subject matter of the museum is so important visitors from any of these categories might want to visit, especially if they have some form of ancestral relationship to those involved in the famine. You may well, therefore, get visitors from all these segments, but all but the dedicated culturally curious are likely to struggle with it as it is at the moment.	<b>Image no. (if appropriate)</b>
<b>CULTURALLY CURIOUS</b> The old-fashioned presentation of the exhibition means that this is the only segment that is likely to engage significantly with the important material and subject matter covered by the collection. Even for this group, many would feel that they have to “mine” the information out of the exhibition.	

<b>GREAT ESCAPERS</b> weak			
<b>SOCIAL ENERGISERS</b> weak			
<b>FAMILIES</b> Virtually no provision or allowance for children or families.			
Other / Comments:			
<b>PROVISION FOR INTERNATIONAL VISITORS</b>			
	<b>Y/N</b>	<b>Image no. (if appropriate)</b>	
Foreign language translations	Not within the exhibition		
Use of non-familiar English (difficult for non-native speakers)	Frequent		
Evidence of assumed knowledge (e.g. of Irish history/ culture)	Frequent		
Good use of words and images together	No		
Other / Comments: An information sheet about the exhibition in a limited number of languages is available at the ticket desk but it is not advertised obviously – you have to ask for help to find out it exists.			
<b>PROVISION FOR PEOPLE WITH DISABILITIES</b>			
	<b>Y/N</b>	<b>Image no. (if appropriate)</b>	<b>Notes</b>
Ramps	partial		Some steps between the exhibition rooms. The old patterned tiles on the floor of some rooms might be tricky for some wheelchair users
Disabled toilets	?		
Handrails	?		
Provision for visually impaired: brail, audio trail, readability of text Tap boards etc.	None obvious		

Provision for hearing impaired: hearing loop, subtitling on audio	None obvious		
Other / Comments:			
<b>SUMMARY</b>			
<b>Highlights</b>			
1. The collection of original letters and artefacts in the site that they actually relate to			
2. The poignant stories that some of these and the main AV tell			
<b>Areas that could be improved</b>			
Many see below			
<b>Potential for development</b>			
<p>Suggest that since this is a 'National' museum and there are no obvious direct connections with the River Shannon per se, that this is seen as a <b>Hidden Heartlands</b> attraction rather than a Shannon attraction.</p> <p>There is great potential for development and improvement of this museum if money were available and the owners willing to see changes.</p> <p>Most notably it should be made more user friendly – this means less text-heavy exhibitions, which should be organised around compelling interpretative themes rather than topics. Much more concise interpretative text aligned with better modern graphic design to make the important and moving contents more easily accessible to a wider range of people. Less use of technical/historic language would help it become more accessible, especially to foreign visitors for whom English is not their first language and who will not be familiar with key dates or political movements in Irish history. It should be made more interactive with more elements designed to provoke discussion and involvement etc. between and amongst visitors. More effective use of modern Audio Visual and computer technologies (e.g. turning books for exploring elements of the archive more effectively). Greater use of reconstructions to make it more three dimensional and less text dominated.</p> <p>If the museum wants to attract more international visitors then a great deal more needs to be done in relation to language provision. International visitors would definitely expect this of somewhere calling itself a National Museum.</p> <p>I would also suggest that the café area needs to be modernised in order to meet the expectation of international visitors.</p>			

See next page for photos

**Attraction: Strokestown National Famine Museum**

**Date of visit: 01/12/18**



Entrance Sign



Entrance lobby to café/ shop / ticket area



Entrance to the National Famine Museum



Very low impact Introduction gallery



Grey panel is introduction to the museum



Slide show in Second gallery



Father struggling to keep children interested



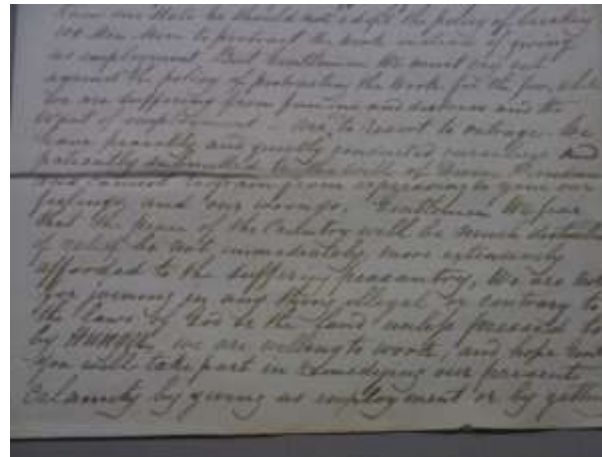
Text heavy panels



Computer monitors half of which not working



Part of original document collection



Reconstruction of a cabin on emigration

**ATTRACTION ASSESSMENT: King House – Historic & Cultural Centre, Boyle**      **Date of visit: 24<sup>th</sup> January 2019**

	Notes
<b>FIRST IMPRESSIONS</b>	
<p><b>BASIC DESCRIPTION</b></p> <p>A beautifully restored Georgian House. It was built and lived in by the King family before they built Rockingham House (now Lough Key Forest and Activity Park). It then became the base for The Connaught Rangers from 1790's to 1922. It then became increasingly derelict until it was restored by the County Council</p> <p>The house takes on a number of visitor-facing functions:</p> <ul style="list-style-type: none"> <li>- A reconstruction of the King family's Georgian house (Overall interior, but only one room apart from the meeting / concert room dressed as a Georgian Family room)</li> <li>- A small exhibition about pre-Elizabethan Irish (Gaelic) life in the area (one room)</li> <li>- A space to exhibit the substantial Boyle Civic Art Collection (c. 280 pieces of contemporary Irish Art).</li> <li>- The Connaught Rangers regimental museum</li> <li>- Exhibition about the King family</li> <li>- AV Auditorium with seats playing videos about the area on loop.</li> <li>- Small exhibition about the role of King House and Boyle in The Creation of a Nation (includes the original jail cells).</li> <li>- An exhibition of the official gifts given to Mary McAleese when she was President of Ireland (she lives by the Shannon near Boyle).</li> <li>- The courtyard contains a café, the local Tourism Information Centre and gift shop (run by a local co-op) and 2 workshops for use by Artists in Residence.</li> </ul> <p><b>BEGINNING</b></p> <p>The gates to the house are located on a sharp bend which forms quite a grand end to a shopping street. However, if you approach from Boyle Abbey (as many tourists would) You could easily pass the entrance without noticing it.</p> <p>The entrance to the courtyard feels quite busy with the café, the TIC and the Artist in Residence workshops.</p> <p>You pass through this area and approach the imposing looking house through the front door. The modest reception desk faces you in very elegant reception gallery which fronts the whole of the front of the house.</p> <p>The initial orientation materials could be improved – at present the various elements of the offer are not very clear. You are not sure if you are about to embark on a tour of a family home, an art gallery or a museum. In practice it turns out to be a mix of all three.</p> <p><b>THE TOUR</b></p>	

Visitors usually go around as part of a guided tour that lasts 40-45 mins. There are photocopied notes available for those going around without a tour. These are available in 6 languages.  
 There is also an audio tour (available in English only) but not many people use this because there are the same audio tracks playing on triggered speakers in each room / gallery.

**MENTION OF THE SHANNON**

Maybe 10% of visitors to Kings House arrive in Boyle by boat (lot of UK, French and German visitors do this). Boyle harbour is linked by canal to Lough Key and Lough Key is linked for boating to the Shannon so there is potential to communicate more about the Shannon to visitors either via the exhibitions or the TIC in the courtyard.

General – Virtually nothing about the River Shannon in the exhibitions.

However – significant potential to make links between the house and the River Shannon / River Boyle / Canal:

- a) All the materials for building the house came up the river
- b) The King family controlled the fishing rights on the river and on Lough Key (they owned 170,000 acres)
- c) They also controlled all the boating interests and trade on the river Boyle and Lough Key.

“whoever controlled the river, controlled everything”

Michael Burke mentioned that it might be possible to show a video about The Shannon in the AV Auditorium.

Comments:

FACILITIES		
	Y/N	Notes
Cafe	Y	In courtyard
Coffee / tea machine / making point	cafe	
Shop	Y	Craft shop and book shop part of TIC in courtyard
Public meeting room	Y	Concert / meeting room upstairs
Toilets	Y	
WIFI	?	
Public WIFI	?	Not sure – forgot to ask
Public charging points for phones etc.	?	
Other / Comments:		

<b>INTERPRETIVE MEDIA</b>		
	<b>Y/N</b>	<b>Notes</b>
Panels	Y	
Audio	Y	Both fixed and portable
Audio Visual	Y	But AV room used for videos about the region
Artefacts	Y	
Models	Y	
Interactives	Y	Limited – mainly one dressing up opportunity and opportunity to use military drum
Face-to-face interpretation	Y	Guided walks
Artworks	Y	Major exhibition of contemporary Irish art and the McAleese gift collection
Other / Comments:		
<b>PROVISION FOR VISITORS</b>		
<b>SUITABILITY FOR TARGET VISITOR SEGMENTS</b>		
<b>CULTURALLY CURIOUS</b>		
Excellent, although the interpretation could be more clearly layered so that people could find the main points more easily. Little participation and little attempt to engage visitors in activity or discussion.		
<b>GREAT ESCAPERS</b>		
Unlikely to be a great attraction for this group. – lot of traditional, non-interactive exhibition material. Some of this group might be attracted by the Contemporary Art exhibition – although not sure this is advertised or described clearly enough in advance of visit. They might also be attracted to the artists in residence – if the workshops are open to the public and / or they hold regular events		
<b>SOCIAL ENERGISERS</b>		
Probably not likely to visit		
<b>FAMILIES</b>		
The provision for families is low key (one dressing up opportunity, The Gaelic history gallery). Even though there is a childrens’ pack with a questionnaire available, it would need considerably more effort to be put in to make it an excellent family visit.		

<b>PROVISION FOR INTERNATIONAL VISITORS</b>		
	<b>Y/N</b>	
Foreign language translations	Y – only on tour notes (available in 6 languages including English, Irish, French, German and Italian). There is no foreign language welcome and there is nothing (at least off season) advertising the availability of these translations.	
Use of non-familiar English (difficult for non-native speakers)	Y in places	
Evidence of assumed knowledge (e.g. of Irish history/ culture)	Y in places	
Good use of words and images together	Variable	
Other / Comments: There are quite a lot of relatively simple adaptations that should be done to make the House more friendly and accessible for visitors for whom English is not their first language.		
<b>PROVISION FOR PEOPLE WITH DISABILITIES (NB this is not an in-depth analysis of disability provision – it is based on first impressions and some facilities may have been missed)</b>		
<b>Is provision obvious?</b>		
Provision for wheelchair users is obvious – other provision is not		
	<b>Y/N</b>	<b>Notes</b>
Ramps	<b>Y</b>	
Disabled toilets	<b>Y (one)</b>	
Handrails	<b>In places</b>	
Provision for visually impaired: brail, audio trail, readability of text Tap boards etc.	<b>Y - limited</b>	There is a brail version of the tour notes available – but it is not advertised and is apparently never asked for.
Provision for hearing impaired: hearing loop, subtitling on audio	<b>N</b>	
Other / Comments: There is a prominent notice about provision for wheelchairs in the entrance. There is a wheelchair available for loan. The upper floors are made accessible to wheelchair users and other less physically able visitors by a lift and a number of strategically located stair lifts.		
<b>SUMMARY</b>		
<b>Highlights</b>		
<b>1. Beautifully restored Georgian building including fine examples of vaulted roofs / ceilings</b>		
<b>2. Outstanding collection of contemporary Irish Art</b>		
<b>3. The Mary McAleese collection of gifts</b>		

<b>4. The Connaught Rangers museum / collection for those interested in military history (especially those with family connections),</b>
<b>5. The courtyard with its café, TIC and artists' studios.</b>
<b>Areas that could be improved</b>
1. Greater clarity is needed about the nature of the visit – both in advance of the visit and on arrival. I think many people are likely to arrive expecting a visit to a Georgian family home – in practice it is more like a visit to a local museum and art gallery.
2. Provision for foreign visitors should be improved if it is to become a significant attraction for the new Shannon propositions
3. Ditto - provision for families should be improved
<b>Potential for development</b>
There is potential for introducing a lot more information about a) the importance of the river and loughs in the past (key method of transport, trade and fish) the connections between the Key family, the building and the River Boyle and Lough Key and ultimately the Shannon system. This could be done in a number of ways, e.g. via the tour guide, via a leaflet and map, via a video for use in AV Auditorium and possibly the TIC.

See photos overleaf

**Attraction: King House – Historic & Cultural Centre**

**Date of visit: 24<sup>th</sup> January 2019**



Entrance gate from road



Busy entrance



Café and TIC Co-op beyond



Artist residency studio



Impressive frontage / entrance to house



Reception desk with part of Boyle Civic Art Collection



Welcome panel



Prominent sign for wheelchair users



Audio tour equipment



Georgian dining room



Celtic Ireland Gallery



Connought Rangers Gallery / Museum

## Attraction: King John’s Castle, Limerick

Date of visit: 28/11/18

### Notes

#### FIRST IMPRESSIONS

##### BASIC DESCRIPTION

Imposing Norman castle, immediately adjacent to the river and the bridge.

The visit comprises a self-guided tour around:

the castle museum,

the interior of the castle courtyard (containing a number or reconstructed mediaeval workshops etc),

the castle chapel and the main castle keep,

a walk onto the roof of the castle to look at the river, bridge and surrounding city and landscape,

a continuation of the exhibition upstairs in the modern glass fronted building housing the shop and café.

##### FIRST IMPRESSIONS

Separate car park well signposted. Although Castle is not well signed from car park.

The castle itself is extremely impressive towering over the River Shannon and the bridge.

The entrance to the castle is experience is anticlimactic – you enter what looks like a side door, rather than through one of the imposing castle gates.

Visit starts inside this building with a detailed museum type exhibition which if you do it thoroughly would take 30 – 45 minutes to explore.

Interestingly, this museum is cut off from the main castle buildings (as far as I can remember you don't even get views out into the castle) so you don't feel you're in a castle tour until you emerge from the exhibition. This could be quite frustrating for some visitors whose main object is to explore the castle. You feel more like you are visiting a museum than a castle.

##### MUSEUM EXHIBITION

Exhibition starts in the early Gaelic period and then introduces the arrival of the Normans and the building of the castle here. However, there is only passing mention to the strategic importance of the site on the Lowest crossing of the Shannon and why the castle was built here.

The story of Limerick and its castle is then told chronologically from there through the medieval period and the developing role of Limerick as a trading port, the reformation, the Elizabethan plantations, the 9 Years War, the Flight of the earls 1607, The 17 century rebellions with the “fortress of King John’s Castle at its beating heart”, The War of the Grand Alliance, Battle of the Boyne, Jacobite army fleeing to Limerick, Siege of Limerick 1690 and 1691, to the Williamite victories, Treaty of Limerick 1691 and the Flight of the Wild Geese.

Although a wide range of interpretative media (including audio, AV, models, historical illustrations etc.), is used throughout the exhibition, it is heavy on information. Visitors require a good attention span in order to take it all in.

There are a number of opportunities for interaction which are aimed at children (e.g. interactive enabling you to build a Norman arch, several opportunities for dressing up). Sadly, the dressing up clothes were missing from several of these.

**SELF GUIDED TOUR OF THE CASTLE**

Once you emerge from this museum you go through into the Castle courtyard. Here you can experience a number of reconstructed medieval workshops, etc., or pose for photos by a reconstructed set of gallows. You can also go through the chapel before exploring the main keep and towers of the castle. There are a few simple room sets within the keep, central to which are AV style portrait panels in which you are meant to meet a key character. Unfortunately, none of these were working at the time of my visit.

The highlight of the visit to the castle itself is probably the dramatic views of the city, river and surrounding landscape from the parapets. From here you can be in absolutely no doubt about what a crucial strategic location the castle is built in and how control of the castle would give you control of the River Shannon and its river and road-based trade and travel.

Sadly, nothing is made in the castle visit of the experience of looking up at the imposing castle walls from the banks of the river and imagining what it must have been like to try to storm this imposing castle. The visitor is not necessarily aware that you can see the castle from this perspective (having entered from the landward side).

**MENTION OF THE SHANNON**

**GENERAL** – surprisingly in view of the purpose of the castle being the control of the River and its lowest crossing point, there is surprisingly little said about the Shannon in the museum exhibition

LIVING SHANNON	None – except for a nice graphic of salmon in the ticket hall
ROUTES, CROSSINGS AND MEETINGS	One reference to the building of the Castle at the strategic location controlling the bridge over the River Shannon and the nearby port. Another part of the exhibition talks about the importance of Limerick as a medieval trading port
TIMELESS	No mention
WELLSPRING OF EARLY CHRISTIANITY	Although mention of the Gaelic culture there was not significant mention of the Shannon.
PEOPLE OF THE RIVER	Quite a lot about life in medieval Limerick
THE MIGHTY RIVER OF IRELAND	Not really except for the Flight of the Wild Geese

	Y/N	
<b>FACILITIES</b>		
Cafe	Yes	
Coffee / tea machine / making point	cafe	
Shop	Yes	
Public meeting room	?	
Toilets	Yes	
Public WIFI	Yes, in cafe	
Public charging points for phones etc.	?	

<b>INTERPRETATION MEDIA</b>		
	Y/N	
Panels	Yes	
Audio	Yes	
Audio Visual	Yes	
Artefacts	Yes	
Models	Yes	
Interactives	Yes	
Face-to-face interpretation	no	
Artworks	Not as such	

<b>PROVISION FOR VISITORS</b>
<b>PROVISION FOR TARGET VISITOR SEGMENTS</b>
<b>CULTURALLY CURIOUS</b> Yes, the museum would cater for them very well
<b>GREAT ESCAPERS</b> Not particularly strong as presented at the moment

<b>SOCIAL ENERGISERS</b>		
Not particularly strong as presented at the moment Best opportunities for this segmented are presented by the view from the parapets and the opportunities for selfies etc provided in the courtyard.		
<b>FAMILIES</b>		
Some appeal for “learn together” type families. Despite the dressing up and arch building opportunities there is relatively little to hold the attention of children in the museum – unless there is a children’s interactive leaflet (but I did not see one on display). The courtyard reconstructions are clearly family orientated, but there appeared to be little in the keep and towers.		
Other / Comments:		
<b>PROVISION FOR INTERNATIONAL VISITORS</b>		
	<b>Y/N</b>	
Foreign language translations	Y	leaflet in different languages and there used to be an audio tour in French German Spanish Italian – this is apparently in the process of being re-done. But no foreign language welcome.
Use of non-familiar English (difficult for non-native speakers)	Yes	
Evidence of assumed knowledge (e.g. of Irish history/culture)	Yes	– little reference to happenings outside Ireland as time references
Good use of words and images together	Variable	
Other / Comments: Would expect to see greater provision at an attraction of this scale and calibre.		
<b>PROVISION FOR PEOPLE WITH DISABILITIES</b>		
	<b>Y/N</b>	<b>Notes</b>
Ramps	Y	to café and shop The Museum is accessible but understandably much of the old castle is not
Disabled toilets	Yes	
Handrails	To	café and shop
Provision for visually impaired: brail, audio trail, readability of text Tap boards etc.	None	apparent

Provision for hearing impaired: hearing loop, subtitling on audio	None obvious	
Other / Comments:		

<b>SUMMARY</b>
<b>Highlights</b>
<b>1. The Castle building itself</b>
<b>2. The views from the parapets</b>
<b>3. The modern displays in museum for those who are that way inclined</b>
<b>4. The pleasant modern café space</b>
<b>Areas that could be improved</b>
<b>1. Ensuring that all the interactive AV portrait panels work</b>
<b>2. Paying attention to the details so that dressing up clothes and interactive cannon balls etc are always there</b>
<b>Potential for development</b>
The way the visit is currently constructed it is as if the visit to the castle itself is almost secondary to the visit to the museum. This feels like a bit of an anti-climax if your objective is to visit the castle. I could see opportunities for altering the castle visit experience so that you could turn this around. I think this would make the visit more attractive to the visitor segments other than the culturally curious and could at the same time still work as well for them. This could involve making the entrance through the main castle gate and encouraging people to explore the main castle buildings and enjoy the dramatic views of the river etc. from the parapets. This would become more of an experiential visit than an intellectual visit. The museum could form more of an optional beginning. Maybe visitors could be given the option of one or the other? Maybe they could be offered two ticket options – one for the castle alone and one for the castle and museum.

*See next page for photos*

### Attraction: King John's Castle

Date of visit: 28/11/18



Dramatic castle in imposing strategic location the ancient crossing point on the River Shannon



View from tower



Entrance to the castle



Modern café and shop building



Part of graphic about the Shannon in reception The Museum Exhibition



Drawers with dressing up clothes missing



Courtyard workshop



Gallows in courtyard



View of River Shannon from parapet

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