

Turasóireacht Uisce
Plean Straitéiseach do Ghailimh

Waterbased Tourism
A Strategic Vision for Galway



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April 2002

Brollach

Is fada an lár Cathair agus Contae na Gaillimh ina gceann scríbe turasóireachta in Éirinn. Tá an cumas san earnáil turasóireachta agus áineasa mara, áfach, sa Chathair agus sa Chontae araon, tuilleadh forbartha agus leathnaithe a dhéanamh ar an táirge turasóireachta. Deimhníonn an staidéar den scoth seo mo chreideamh féin go bhfuil an earnáil i nGaillimh bríomhar, beomhar agus faoi réir le tuilleadh forbartha a dhéanamh uirthi.

Fáiltím roimh éirim na moltaí, go háirithe iad sin a dhíríonn ar an ngá do gach gníomhaireacht ábhartha pleanála agus forbartha obair as lámha a chéile. Is féidir le fiontraithe agus gníomhaireachtaí Stáit agus iad ag obair le chéile a chinntiú go mbíonn an toradh ar infheistíocht d'infheistíochtaí turasóireachta agus áineasa a bhaineann leis an muir agus a dhéanfar amach anseo suntasach agus inbhuanaithe.

Níl amhras ar bith orm nach féidir le feidhmiú phlean straitéiseach infheistíochta a spriocdhíreodh ar na sásraí maoinithe atá ann anois faoin bPlean Forbartha Náisiúnta 2000-2006 sochair mhóra a thabhairt go Gaillimh, chomh fada agus a bhaineann le bonneagar, cruthú fostaíochta agus giniúint rachmais do shaoránaigh na Cathrach agus an Chontae.

Ciallaíonn an cinneadh a rinneadh le déanaí Foras na Mara a athlonnú i nGaillimh ar bhonn buan, chomh maith leis na saoráidí den scoth taighde atá ann cheana in Institiúid Martin Ryan ag Ollscoil na Gaillimhe agus i gCarna, go bhfuil Gaillimh anois bunaithe mar phríomhát taighde mara na hÉireann.

Cé go bhfuil fáilte le cur roimh na forbairtí sin ina gceart féin, cruthaíonn siad timpeallacht chomh maith a thugann ardluach dár n-aibhneacha, dár lochanna agus dár bhfarraigí. Creidim féin go láidir go bhfuil tréimhse spreagúil i ndán don earnáil turasóireachta mara i nGaillimh amach anseo agus tá sé ríthábhachtach go n-oibrímid ar fad as lámha a chéile lena chinntiú go mbeidh Gaillimh i gcroílár na turasóireachta mara, ní amháin don iarthar, ach d'oileán na hÉireann ina iomláine.

Tá moladh le tabhairt do Fháilte an Iarthar, d'Fhoras na Mara agus do Ghníomhaireachtaí éagsúla comhoibritheacha i nGaillimh as tabhairt faoin staidéar an-luachmhar seo. Caithfidimid ar fad gníomhú anois lena chinntiú nach gcaitear i leataobh é ag bailiú deannaigh ach go ngníomhóidh sé mar spreagadh dearfa chun sochair fadtréimhseacha a thabhairt i gcric don Chathair agus don Chontae.



Frank Fahey TD

Aire na Mara agus Acmhainnt Nádúrtha

Foreword

Galway City and County have long been premier tourist destinations in Ireland. However, the marine tourism and leisure sector, both in the City and in the County, has the potential to further develop and expand the tourism product. This excellent study confirms my own belief that the sector in Galway is vibrant, alive and ripe for further development.



I welcome the thrust of the recommendations, in particular those focusing on the need for all relevant planning and development agencies to work together. Entrepreneurs and State agencies working together can ensure that the return on investment for future marine related tourism and leisure investments is both substantial and sustainable.

I have no doubt the implementation of a strategic investment plan which would target funding mechanisms now in place under the National Development Plan 2000-2006 can bring major benefits to Galway, in terms of infrastructure, employment creation and wealth generation for the citizens of the City and County.

The recent decision to re-locate the Marine Institute to Galway on a permanent basis, along with the excellent research facilities which already exist in the Martin Ryan Institute at Galway University and Carna, means that Galway is now firmly established as the marine research capital of Ireland.

Whilst these positive developments are welcome in their own right, they also create an environment which values our rivers, lakes and seas. I firmly believe that the marine tourism sector in Galway has an exciting time ahead of it and it is vital that we all work together to ensure that Galway becomes the marine tourism hub, not only for the west, but for the whole island of Ireland.

Ireland West Tourism, the Marine Institute and the various collaborating Agencies in Galway are to be commended for undertaking this very valuable study. We must all act now to ensure that it does not gather dust but acts as a real stimulus to delivering long-term benefits for the City and County.

Frank Fahey

Frank Fahey TD

Minister for the Marine and Natural Resources



CLÁR / CONTENTS

	Page No.
ACHOIMRE BAINISITIOCHTA	VII
EXECUTIVE SUMMARY	IX
1.0 RÉAMHRÁ / INTRODUCTION	1
1.1 Aidhmeanna agus Spriocanna / Aims and Objectives	1
1.2 Modh Oibre / Study Methodology	2
1.3 Coiste Oibre / Steering Committee	2
2.0 CÚLRA / BACKGROUND	3
2.1 Cúinsi Náisiúnta / National considerations	3
2.2 Cúinsi Áitúla / Ireland West and County Galway considerations	3
2.3 Treochtaí /Trends	4
2.4 Áiseanna áitiúla thurasóireacht uisce atá i nGaillimh faoi láthair / Galway's current water-based tourism facilities	4
2.5 Cúlra / Key background product considerations	7
2.6 Cúlra na bpríomhchúinsí margáiochta / Key background market considerations	7
2.7 Athbhreithniú Polasaí / Background policy and strategy review	7
2.8 Iniúchadh ar an Timpeallacht / Audit of natural and built environment	
2.9 Turasóireacht uisce i nGaillimh – Laigí, Deiseanna agus Bagairtí / Strengths, Weaknesses, Opportunities and Threats	9
3.0 PLEAN STRAITÉISEACH / THE STRATEGIC APPROACH	13
3.1 Introduction	13
3.2 Converting Weaknesses into Strengths	13
3.3 Capitalising on Opportunities	15
4.0 MOLTAÍ AIDHME AGUS STRAITÉISE / THE STRATEGIC FRAMEWORK	17
4.1 Aidhmeanna /A Vision for the Future	17
4.2 An Bealach Chun Cinn / The Way Forward	17
4.3 Méadú agus Caomhnú a dhéanamh ar an Timpeallacht Uisce / Enhancement and Protection of the Marine and Riverine Environment	17
4.4 Forbairt Táirgí / Product Development	18
4.4 Margáiocht, oiliúint, bainistiú : Cur Chuige Omhtháite / Marketing, training, management: An Integrated Approach	23
5.0 SAMPLAÍ DE DHEISEANNA FORBARTHA /EXAMPLES OF POTENTIAL DEVELOPMENT PROJECTS	27
5.1 Réamhara / Introduction	27
5.2 Canáil Eglinton / Eglinton Canal	28
5.3 Loch Roisín agus Coill Bhearna / Lough Rusheen and Barna Wood	29
5.4 Iascaigh Chois Fharriaga / South Connemara Fisheries	32
5.5 Ceantar na nOileán	34
5.6 An Caoláire Rua / National Maritime Watersports Designation, Killary	36
5.7 Abhainn an Chláir / River Clare	38
5.8 Béal Átha na Sluaighe /Ballinasloe	40
6.0 NA PRÍOMHPHOINTÍ / CONCLUSIONS	43
Appendix I	43



ACHOIMRE BAINISTÍOCHTA

Réamhrá

Is éard atá in Turasóireacht Uisce – Plean Straitéiseach do Gaillimh ná tuairisc a ndearnadh coimisiúnú air ag grúpa Áisíneachtaí i gcomhar le Fáilte an Iarthair. Ba iad na téarmaí tagartha a bhí aige ná staidéar a dhéanamh chun:

- measúnú a dhéanamh ar an bpóiteansal atá ann chun forbairt a dhéanamh ar an turasóireacht uisce agus ar an acmhainn saoire i gCathair agus i gContae na Gaillimhe
- an acmhainneacht sin a aithint agus straitéis forbartha a fhorbairt do shé thionscnamh ar a laghad a bhainfeadh le turasóireacht uisce agus caitheamh aimsire, agus iad sin a bheith in ionaid gheografacha a roghnófaí ar fud na Gaillimhe
- tuilleadh roghanna céimithe forbartha a mholadh a thacódh leis an dul chun cinn eacnamaíochta agus a chothódh é i dtaca leis an earnáil turasóireachta uisce agus caitimh aimsire.

Roghnaíodh Tourism Development International chun an staidéar a dhéanamh, agus tá na torthaí ar fáil sa tuarascáil seo.

Fís don Todhchaí

Tá neart acmhainní nádúrtha den scoth i gcathair agus i gcontae na Gaillimhe chun togra turasóireachta uisce a bhunú orthu. Teastaíonn plean straitéiseach infheistíochta chun forbairt a dhéanamh ar an mbunchloch táirgíochta atá ann cheana féin agus chun roinnt tionscnamh mór nua a fhorbairt. Beidh an plean straitéiseach sin mar spreagadh chun grúpaí de ionaid gníomhaíochta ar uisce a bhunú, chun an fhorbairt a scaipeadh ar fud an réigiúin agus chun breis cuairteoirí a mhealladh chuig an réigiún as an tír seo agus ón iasacht.

Tá an straitéis faoi réir na mbunphrionsabal seo a leanas:

- Méadú agus caomhnú a dhéanamh ar an timpeallacht mara agus abhann,
- Forbairt a dhéanamh ar tháirgí a bheadh bunaithe ar lárionaid gníomhaíochta do turasóireacht uisce,
- Margaíocht, oiliúint agus bainistiú.

Molann an tuarascáil roinnt gníomhaíochtaí straitéiseacha chun an fhís sin a bhaint amach.

(i) Moltaí timpeallachta

Ní mór cosaint a thabhairt don acmhainn

iascaireachta; leanacht ar aghaidh leis an infheistíocht chun uisce fuílligh a ghlanadh, srianadh a dhéanamh ar eisilteacht fhosfarach isteach sna huiscís atá ar an dhromchla agus faoi thalamh; forbairt straitéiseach bainistíochta a dhéanamh ar na réigiúin uisce intíre

Moltaí i leith forbairt táirgí

- Is féidir cathair na Gaillimhe a fhorbairt mar phríomhláthair don turasóireacht uisce, trí úsáid a bhaint as na hacmhainní iontacha atá i gcuana na Gaillimhe, chomh maith le habhainn na Coiribe, dugaí na Gaillimhe, Bóthar na Trá, agus na canálacha agus srutháin na muilte atá ag rith tríd an gcathair. Ar na deiseanna forbartha sin tá:
 - forbairt ar mhuirín cathrach agus le bruach an uisce i gceantar na ndugaí;
 - fheabhsú a dhéanamh ar bhruacha Chanáil Eglinton
 - turasóireacht samhailteach a fhorbairt i mBóthar na Trá;
 - forbairt a dhéanamh ar na saoráidí agus ar na fearais atá sna cuanta mara in oirthear agus in iarthar na cathrach.
- Tús áite a thabhairt don bhforbairt atáthar a dhéanamh ar an acmhainn iascaireachta do thurasóirí ar Loch Coirib. Ionad Fionnachtana a bhunú chun léirmhíniú a thabhairt ar an oidhreacht shaibhir iascaireachta, agus tugtar aitheantas freisin do deiseanna forbartha a thugann na hacmhainní cultúrtha agus nádúrtha atá ag an loch.
- Ní mór tús áite a thabhairt do thograí a mheallfaidh daoine le fanacht thar oíche ar na hoileáin. Ní mór an cumas taistil chuig na hoileáin a chur san áireamh, áfach, nuair a bheadh moltaí den chineál sin á meas.
- Feadh chósta Chonamara, moltar go dtabharfaí tús áite don athbheochan ar an turasóireacht iascaireachta i gConamara agus forbairt a dhéanamh ar lárionaid turasóireachta uisce i gCeantar na nOileán, i gCloch na Rón agus sa gClochán.
- Tá deis ag an gCaoláire Rua buntáiste a bhaint as an bhforbairt ghníomhaíochta atá bunaithe ansin cheana féin agus ba chóir an láthair a roghnú chun saoráid náisiúnta don spórt mara a bhunú ann.

- In oirthear na Gaillimhe luaitear na réigiúin seo a leanas mar ionaid ar chóir forbairt a dhéanamh orthu láithreach don turasóireacht uisce: Port Omna, Abhainn an Chláir, Baile Locha Riach agus Béal Átha na Sluaighe.
- I gCinn Mhara, moltar feabhas a chur ar na bealaí rochtana, tograí a ghríosadh san earnáil phríobháideach, agus borradh a chur faoi imeachtaí a bheadh bunaithe ar uisce.

Margaíocht, oiliúint agus bainistiú

- Meastar go bhfuil plean comhtháite ina chuid lárnach den fhorbairt atá le déanamh ar an turasóireacht uisce. Moltar oifigeach margaíochta a cheapadh chun comhordú a dhéanamh ar an straitéis mhargaíochta, chun gréasáin a chruthú laistigh den earnáil thurasóireachta agus chun agus chun forbairt a dhéanamh ar phlean margaíochta a bheadh bunaithe ar an éiceolaíocht.
- Ba chóir athbhreithniú a dhéanamh ar na háiseanna oiliúna atá ar fáil don earnáil thurasóireachta, go háirithe sna réimsí a bhaineann le margaíocht, le cúram na gcustaiméirí, le scileanna gnó agus le scileanna a bhaineann le gníomhaíochtaí sainiúla.
- Tá gá freisin le pleananna i dtaca le bainistiú na loch agus molann an tuarascáil go ndéanfaí athbhreithniú ar an ról atá ag Údarás Loingseoireachta Loch Coirib.

Ná Cásanna a Scrúdaíodh:

Tá seacht gcinn de thionscnaimh shamplacha curtha i láthair anseo mar chásanna staidéir chun léiriú a thabhairt ar acmhainneacht na turasóireachta uisce i nGaillimh. Is iad na cásanna a ndearnadh staidéar orthu ná: Canáil Eglinton agus Loch Roisín i gcathair na Gaillimhe, Na hIascaigh i gCois Fharráige agus Ceantar na nOileán i gConamara; saoráid náisiúnta spóirt mara ar an gCaoláire Rua; Abhainn an Chláir agus Béal Átha na Sluaighe in oirthear na Gaillimhe.

Conclúidí:

Tá béim curtha ag an staidéar seo an gá atá ann go mbeadh comhoibriú idir na háisíneachtaí cuí pleanála agus forbartha ar fad chun go gcuirfear i gcrích na

moltaí atá sa doiciméid seo.

Críochnaíonn an staidéar leis an dearcadh go bhfuil an-deis go deo ag na dreamanna forbartha díriú ar na foinní maoinithe atá ar fáil faoin bPlean Náisiúnta Forbartha, agus i dtaca leis na tionscnaimh a bheadh ag lorg maoinithe den sórt sin, moltar go mbeidh plean straitéiseach acu, go mbeadh siad dírithe ar an margadh atá ar fáil agus go mbeidís ag cloí go hiomlán le na gnása sláintiúla timpeallachta agus pleanála.

EXECUTIVE SUMMARY

Introduction

Water-based Tourism – A Strategic Vision for Galway is a report commissioned by a consortium of Agencies in collaboration with Ireland West Tourism. The terms of reference were to undertake a study which would:

- evaluate the potential to develop the water-based tourism and leisure resource in Galway City and County
- identify the potential and provide a development strategy for at least six pilot water-based tourism and leisure initiatives in selected geographic locations throughout Galway
- recommend further phased development options which would enhance and sustain economic progress of the water-based tourism and leisure sector in Galway.

Tourism Development International were contracted to undertake the study, the results of which are presented in this report.

A Vision for the Future

Galway city and county has significant potential to develop water-based tourism. A strategic investment plan will be required to enhance the existing product base and to develop a number of flagship initiatives. This strategic approach will act as a catalyst to create clusters of water-based activities, encourage regional spread and attract increased domestic and overseas visitors to the area.

This strategy is guided by the following key principles:

- enhancement and protection of the marine and riverine environment
- product development, centred on clusters of water-based tourism activity
- marketing, training and management.

The report recommends a number of strategic actions aimed at achieving this vision.

Environmental Recommendations:

- There is a need to protect and enhance the angling resource; to continue investment in improving effluent treatment; to control phosphorous discharges to surface and ground waters; and to develop coastal and inland water

zone management strategies.

Product Development Recommendations

- Galway city has the potential to become a major centre for water-based tourism, utilising the resource of Galway Bay, the river Corrib, Galway docks, Salthill as well as the canals and mill races which run through the city. Development opportunities include:
 - a city marina and waterfront developments in the Dock area;
 - enhancement of the Eglinton Canal corridor
 - developing innovative tourism products at Salthill
 - improved facilities and amenities in the tidal bays to the east and west of the city.
- The continued enhancement of the tourism angling resource of Lough Corrib is given priority. The creation of a Discovery Centre to interpret the rich heritage of angling, and the cultural and natural resources of the lake is also identified as a development opportunity.
- Tourism development which encourages overnight stays on the Island should be supported. However, carrying capacity considerations must be taken into account when evaluating any such proposals.
- Along the Connemara coast, it is recommended that priority should be given to the rejuvenation of the Connemara fisheries and to developing clusters of water-based tourism at Ceantar na n'Oileán, Roundstone and Clifden.
- Killary Harbour has the potential to capitalise on the activity base which already exists and should be branded as a national marine watersports destination.
- In east Galway development locations for water-based tourism are identified for Portumna, the River Clare, Loughrea and Ballinasloe.
- In Kinvara, recommendations for improving access, encouraging private sector initiatives and water-based events are proposed.

Marketing, Training and Management:

- An integrated marketing approach is central to the development of water-based tourism. The appointment of a marketing officer to co-ordinate

a marketing strategy, create networks within the tourism sector and pilot an eco-tourism brand, is recommended.

- A review of training opportunities for the tourism sector, particularly in the areas of marketing, customer care, business skills and specific activity skills, is required.
- The need for lake management plans is recognised and the report recommends a review of the role of the Lough Corrib Navigation Authority.

Case Studies:

Seven indicative development options are presented as case studies to demonstrate the potential of water-based tourism in Galway. The case studies examined are: The Eglinton Canal and Lough

Rusheen in Galway city; South Connemara Fisheries and Ceantar na n'Oileán in Connemara; a national maritime watersports designation for Killary Harbour; the River Clare; and Ballinasloe in East Galway.

Conclusions:

The study highlights the need for all relevant planning and development agencies to work together to deliver the recommendations included in this document.

The study concludes by recognising the real opportunity which now exists for potential developers to target funding mechanisms under the National Development Plan, and calls for projects seeking such funding to be strategically driven, market-led and fully in accordance with good environmental and planning practices.

1.0 RÉAMHRÁ / INTRODUCTION

1.1 Aidhmeanna agus Spriocanna / Aims and Objectives

Staidéar é seo ar roghanna éagsúla forbartha do thionscail na turasóireachta uisce i gContae na Gaillimhe. Tá fiosrú á dhéanamh faoi na deiseanna forbartha ar chósta, ar aibhneacha agus ar locha Chontae na Gaillimhe mar áiseanna turasóireachta, agus a theacht ar na cúiseanna nár dearnadh an fhorbairt seo cheana féin.

Ina dhiaidh sin ba chóir úsáid a bhaint as an eolas a bailíodh thuas chun acmhainneacht na scéime a aimsiú agus straitéis forbartha a leagan amach do sheacht dtogra atá roghnaithe.

Chuir an fhoireann staidéir na pointí seo a leanas san áireamh le linn a gcuid fiosruithe:

- An turasóireacht atá bunaithe cheana féin i gcathair na Gaillimhe agus i gConamara.
- Conas a chuirfeadh aon fhorbairt nua leis na polasaithe atá ann cheana féin, agus conas a mheallfaí breis turasóirí le fanacht níos faide i limistéir níos forleithne.
- An gá atá ann go mbeadh forbairtí nua eacnamúil agus mealltach d'infheisteoirí. Ní mór díriú ar bhealaí le buaicfhorbairt a dhéanamh.
- Cinntiú go mbeidh aon fhorbairt atá beartaithe ag dul leis an timpeallacht, leis an gcultúr, agus leis an bpobal thar timpeall i gcoitinne.

This study examines the future development options for water-based tourism in County Galway, in the context of a market-led and sustainable approach to land use planning. The aims of the study were to: -

- Evaluate the potential to develop County Galway as a water-based tourism and leisure destination - embracing coastal, river and lake resources and a wide range of activities, both water-based and shore-based.

- Identify the factors that have led to County Galway not realising its full potential for the development of the water-based tourism and leisure resource.

- Utilise the information gathered above in order to identify the potential to initiate and develop water-based tourism, leisure activities and enterprises in selected geographic locations within County Galway.

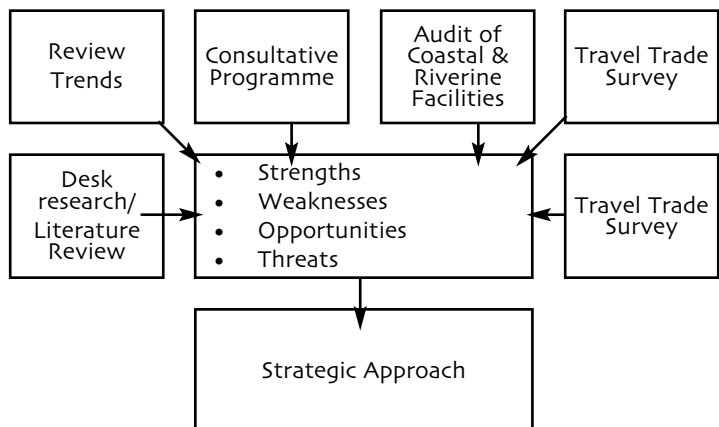
- Identify appropriate development strategies and investments needed to underpin sustained economic development of the marine resource in Galway.

The study was undertaken by a multi-disciplinary team, which took into account the following key issues:

- The existing well-established tourism context of Galway City and Connemara, and the international image of the West. Careful consideration was given to the compatibility of any new development of scale to ensure that the integrity of the tourism product is preserved.
- How any proposed development could be synergistic with the policies for marine and regional tourism development and how such a development would promote increased overnight stays and increased regional spread.
- The need for any proposed development to be commercially sustainable and sufficiently innovative to attract public and private sector partnership funding.
- How to achieve a critical mass of development.
- How any proposed development will interface with the landscape, culture and the community in general.

1.2 Modh Oibre / Study Methodology

Bhí na comhairleoirí an-láidir den tuairim go gcaithfeadh éileamh a bheith ar aon fhorbairtí nua, agus freisin go mbeidís ag dul leis an timpeallacht agus le dea-pholasaí pleanála. Dá réir sin cuireadh an-bhéim ar thaighde margaíochta agus ar na mionphointí a bhaineann le cúrsaí pleanála, go háitiúil agus go náisiúnta.



Key objectives of the study were that opportunities identified should be:

- (a) Market-led, i.e., that there is likely to be a market demand.
- (b) Environmentally sustainable and fully in keeping with good planning policy.

In order to meet these objectives, detailed market research, extensive sectoral consultation (see Appendix 1), and a review of planning and tourism policy at local and national level was undertaken.

1.3 Coiste Oibre / Steering Committee

Tá na comhairleoirí buíoch don iomad duine a chuidigh leo sa staidéar seo, go háirithe foirne gairmiúla na n-eagraíochtaí seo a leanas:

A Steering Committee, comprised of the following members, was responsible for commissioning this study:

- Martin Bradley/Brian Flynn – Ireland West – Chair
- John Tierney - Galway City Council
- Enda Thompson – Galway County Council
- Bertie Ó Finneadha – Údaras na Gaeltachta
- Michael Kennedy – Western Regional Fisheries Board
- Anne Wilkinson – Marine Institute
- Uinseann MacThómais – An Roinn Ealaíon, Oidhreacht, Gaeltachta agus Oileán
- Capt. Brian Sheridan – Galway Harbour Board
- Declan Clarke – Martin Ryan Institute, National University of Ireland
- Monica Nielsen – Galway Mayo Institute of Technology.

This committee liaised closely with Tourism Development International (TDI), the consultants who were commissioned to undertake the study and to develop a strategic vision for water-based tourism in Galway. The committee facilitated TDI by providing background information, advice and direction during the course of the study. In addition, a wider consultative forum was provided by means of public and private sectoral consultations with TDI and through written submissions to TDI (Appendix 1).

2.0 CÚLRA / BACKGROUND

Tá an staidéar straitéiseach seo ar an turasóireacht uisce i nGaillimh á dhéanamh ag am criticiúil i bhforbairt na turasóireachta in Éirinn sa todhchaí.

This strategic consideration of the future development of water-based tourism in Galway is taking place at a critical time for the future of Irish tourism. It is prepared against a background of significant change.

2.1 Cúinsí Náisiúnta / National considerations

Tá níos mó éilimh ar imeachtaí gníomhacha agus ar cúrsaí sláinteachais anois ná mar a bhíodh, agus tá bealaí nua ag daoine lena n-am saor a chaitheamh. Tá timpeallacht an-ghoilliúnach i gceist le uiscí na tíre, mar atá léirithe ag an meath atá tagtha ar éisc farraige, an bradán agus an liathán, mar shampla.

Tá forbairt mhór déanta i dtíortha eile ar an turasóireacht uisce – turais thíos faoi uisce, breathnú ar mhamaigh agus ar iasc fiáin, turais éiceolaíochta, agus a leithéidí. Ach ní mór an-aird a thabhairt ar an margadh dúchais freisin, chun daoine a mhealladh ar ais an athuair. Ní mór iarracht a dhéanamh an turasóireacht a scaipeadh amach ar an oiread ceantar agus is féidir, agus caithfidh lucht déanta táirgí turasóireachta súil ghéar a choinneáil ar an margadh agus ar chúrsaí forbartha. Ní mór díriú ar ghrúpaí agus ar chumainn ar leith freisin, seachas a bheith ag díriú ar an ngnáth-thurasóir.

Mar gheall ar an iomaíocht mhór idirnáisiúnta, ní mór a chinntiú go ndéanfar infheistíocht leanúnach i gcúrsaí margaíochta, i bhforbairt táirgí, i gcaighdeán na seirbhíse, i slánú na timpeallachta agus i ngach gné eile den turasóireacht.

- Changing markets and consequently tastes are contributing to a demand for a more activity focussed, interactive tourism experience, at the expense of purely “passive” pursuits.
- Changes in lifestyle and the emergence of competitor activities (i.e. health and fitness, shopping, the internet, etc.) are now posing a

threat to traditional leisure pursuits.

- In the closing decades of the 20th century, new water-based tourism products rapidly emerged in British Columbia, New Zealand, South Africa, the Caribbean and elsewhere. These include marine mammal watching, underwater tours, and other nature-based tourism (turtle watching, shark watching, and ecology tours).
- To achieve sustainability, tourism businesses will need to take greater account of the needs of the domestic market, which has the potential to generate repeat business.
- Dispersal of tourism in an effective and environmentally sustainable way is a key challenge.
- Tourism product providers must observe more closely the principles of sustainable development.
- Water-based tourism is dependant on a highly sensitive and fragile environment. The need for environmental management considerations in all development options is paramount. Protecting our inland, estuarine and coastal waters and maintaining sustainable populations of sea trout and wild North Atlantic salmon must be priority national objectives.
- Activity tourism is often organised around clubs (special interest groups), rather than the needs of general holiday visitors.
- In the face of massive international competition, sustained investment will be required in marketing, product development, quality of service, environmental protection, visitor management and conservation.

2.2 Cúinsí Áitiúla / Ireland West and County Galway considerations

Thart ar chathair na Gaillimhe agus ar Chonamara atá an turasóireacht dírithe san Iarthar. Tá borradh tagtha an athuair faoin iascaireacht ar Loch Coirib ach tá laghdú ar an stoc bradán agus liathán i gConamara. Tá tábhacht chultúrtha ag baint le Oileáin Árann agus le Gaeltacht na Gaillimhe. Bíonn brú mór tráchta i gceantracha ar leith. Taisteal agus áilleacht an cheantair na príomhghnéithe turasóireachta atá san áit, agus is minic gur deacair aon eolas a fháil faoi imeachtaí ar uisce.

- Tourism in Ireland West is concentrated in Galway City and Connemara.

- Accommodation clusters hug the coast.
 - Lough Corrib has a strong game fishing tradition and is fishing very well in recent years following a long-term development programme.
 - Connemara has been particularly affected by the decline in salmon and sea trout stocks.
 - The Aran Islands and the Galway Gaeltacht are significant cultural tourism assets.
 - Traffic congestion can become a problem in some popular areas, as tourists tend to follow popular routes, often in need of upgrade.
 - Touring and scenery are the primary tourism products.
 - It can be difficult to access information on water-based activities.

2.3 Treochtaí / Trends

Is beag forbartha atá ar imeachtaí uisce; bíonn an séasúr turasóireachta gearr agus bíonn lucht lóistín ag brath ar ghnáth-thurasóirí seachas aon chineál speisialtóireachta sa turasóireacht. Meastar gurb é an margadh baile agus margadh na Breataine is fearr a d'fheilfeadh don turasóireacht uisce faoi láthair, mar go dteastódh áiseanna breise den scoth le cuairteoirí a mhealladh ón Eoraip agus as Meiriceá.

- Galway is, in terms of water-based activities, a developing tourism and leisure location. For most operators the season is short and accommodation operators rely on general touring traffic rather than special interest tourism.
- The domestic and British markets are likely to remain the primary markets for water-based activities. Opportunities to attract the adventure-orientated European and American markets exist, but facilities to attract them must be of the highest quality.

2.4 Áiseanna áitiúla thurasóireacht uisce atá i nGaillimh faoi láthair / Galway's current water-based tourism facilities

Na Príomh-áiseanna gníomhacha uisce: Iascaireacht slaite ar farraige, ar aibhneacha agus ar locha.

Na Príomh-imeachtaí neamhghníomhacha uisce: Cuairt ar na hoileáin; Na tránna agus na duirlingí; Turais chúrsála; ; Ionaid Oidhreachta/Mara; Breathnú ar an nádúr; Turais ar bháid pléisiúir.

Áiseanna eile gníomhacha uisce: Scimeáil le gaoth; Scíáil ar uisce; Tumadóireacht; Kayakadóireacht; Ag iomramh.

Áiseanna eile neamhghníomhacha: Seandálaíocht muirí; Longa cúrsála.

Primary and secondary water-based activity products for Galway are defined as follows:

Primary active water-based products

- Game angling
- Sea angling
- Coarse angling
- Pleasure boating

Primary passive water-based pursuits

- Visits to islands
- Beaches and coastal recreation (including walking)
- Coastal/inland pleasure cruises
- Aquaria/interpretative centres
- Nature tourism/marine mammal watching
- Coastal/lake touring routes

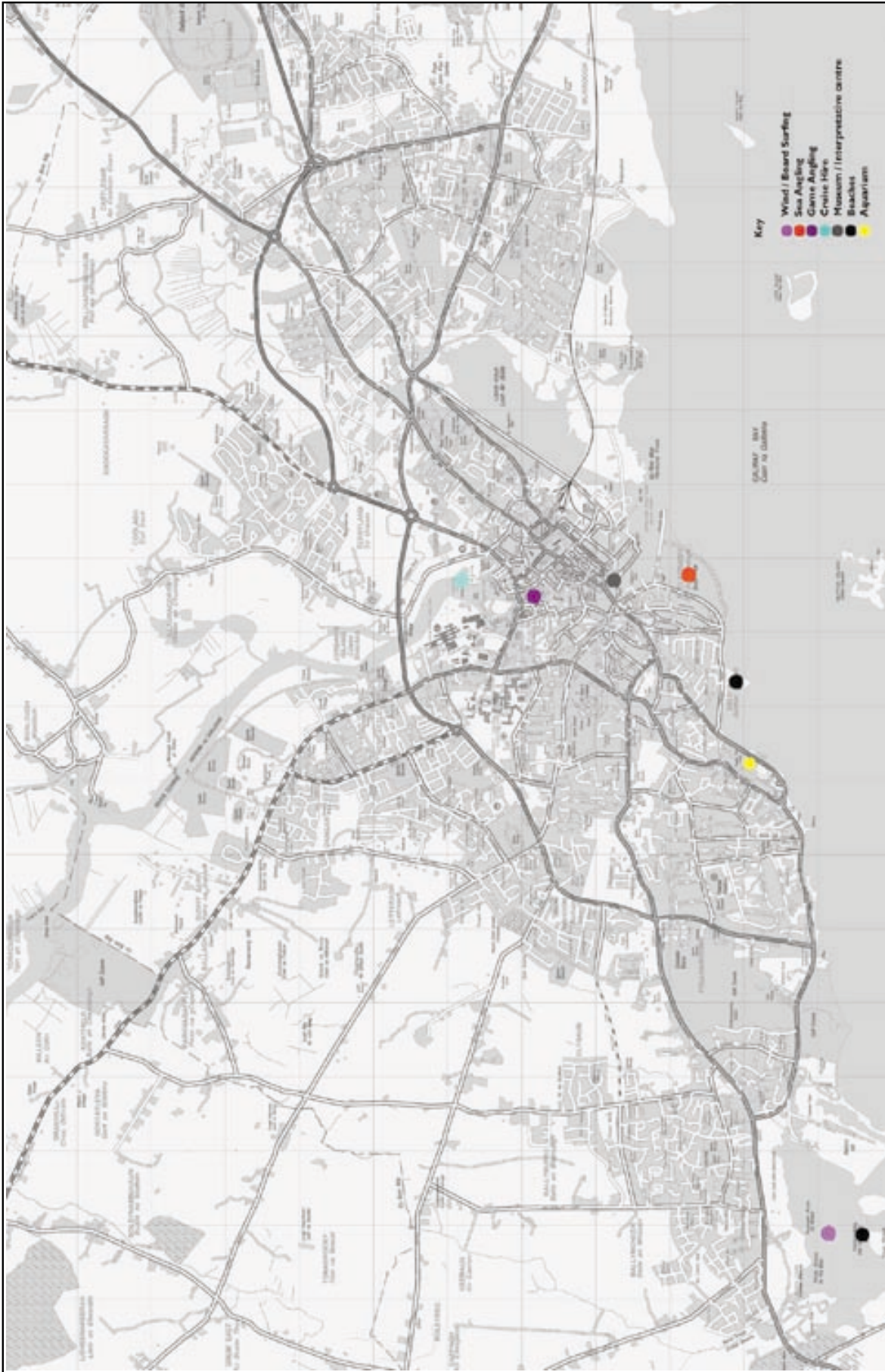
Secondary active water-based pursuits

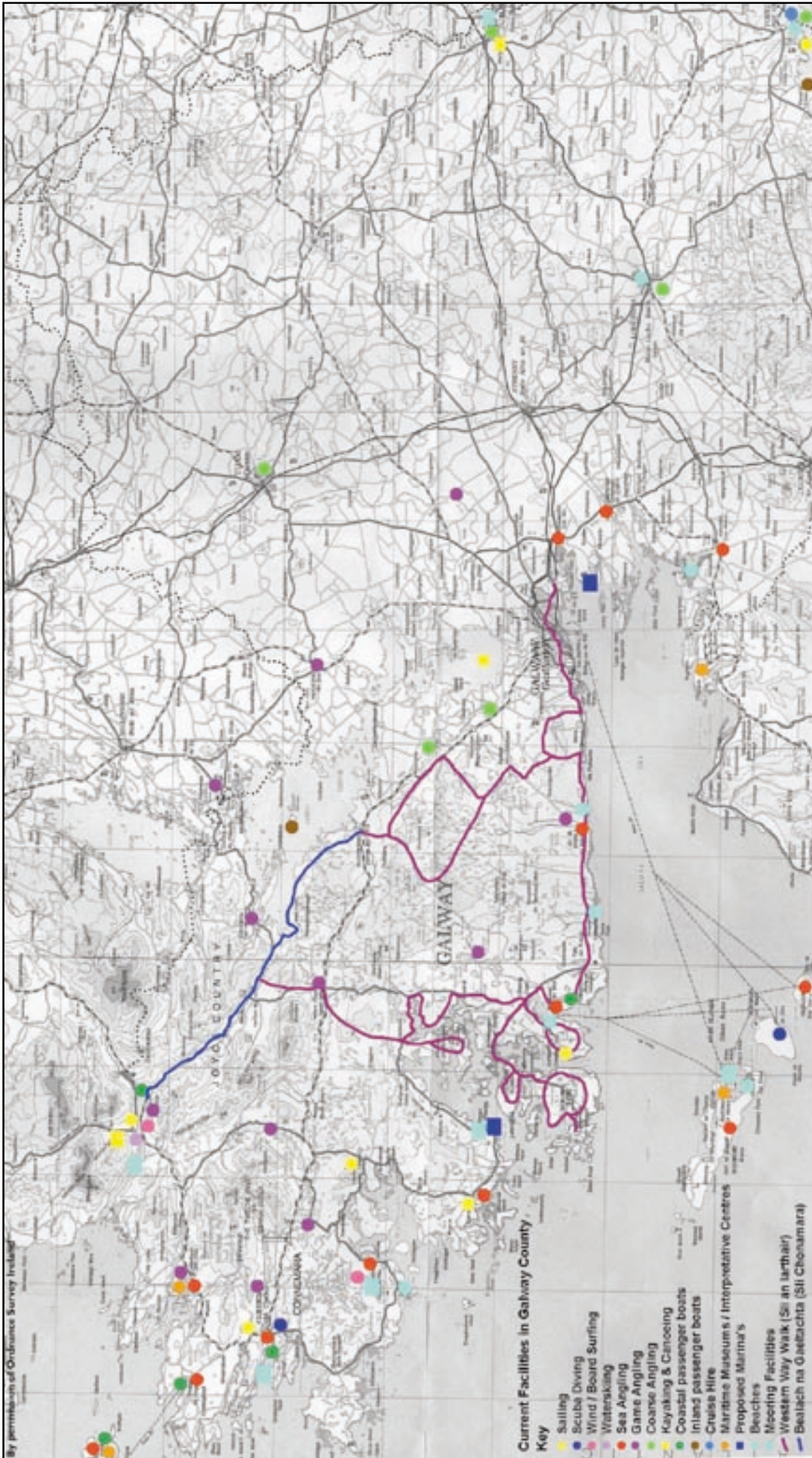
- Windsurfing
- Water-skiing
- Scuba-diving
- Sea-kayaking
- Canoeing

Secondary passive water-based pursuits

- Marine archaeology
- Cruise ships

A review of tourism publications, the internet and special interest publications in order to illustrate water-based tourism currently available to the market is summarised in Maps 1 and 2 overleaf.





Map 2
Áiseanna reatha i gCathair na Gaillimhe
Current Facilities in Galway County
(By kind permission of Ordnance Survey Ireland)

2.5 Cúlra / Key background product considerations

Is beag forbartha atá déanta ar imeachtaí turasóireachta ar uisce i nGaillimh.

Is í an iascaireacht seilge an tairge turasóireachta ar uisce is fearr faoi láthair agus Loch Coirib an t-ionad is fearr. Tá laghdú mór ar an stoc bradán agus liathán, áfach.

Tá forbairt á dhéanamh ar tháirgí i gceantar an Líonáin agus an Chaoláire Rua agus tá an- tábhacht ag baint leis an mbeagán féilte tábhachtacha bád a eagraítear sa gceantar, cé gur beag forbartha atá déanta ar chósta na Gaeltachta. D'fhéadfaí forbairt mhór a dhéanamh ar an iascaireacht slaithe in oirthear na Gaillimhe.

Tá forbairt mhaith déanta ar sheirbhísí farantóireachta cé nach amhlaidh atá an scéal maidir leis na háiseanna atá ar na hoileáin. Dá bharr sin ní fhanann cuairteoirí i bhfad orthu agus bíonn brú mór ar Inis Mór ag buaic an tséasúir thurasóireachta.

Key considerations to emerge from the review are:-

- Water-based activity tourism is largely underdeveloped in Galway and could be said to be in its infancy.
- Game angling is currently Galway's most important water-based tourism product. Lough Corrib in particular is a prime asset. However salmon fisheries have suffered a major decline as have sea trout populations.
- The Leenaun/Killary area has a developing cluster of market-led activity products.
- A limited number of important festivals has been developed giving good profiles to angling and traditional boats.
- The Gaeltacht coastline is under-utilised.
- East Galway has potential to develop a stronger angling product.
- Ferry services are generally well developed but on-island activities are not, with resulting problems of limited length of stay.
- Inis Mór is under severe pressure at peak times due to large numbers of visitors.
- Ecotourism may represent a product opportunity.

- There is little co-ordinated marketing of water-based activity products.
- Operators often have to go overseas to gain certification in water-based activities.

2.6 Cúlra na bpríomhchúinsí margaíochta / Key background market considerations

Cé is moite den iascaireacht slaithe agus do chuariteanna ar na hoileáin, is beag turasóireachta eile a dhéantar ar uisce i gcathair ná i gcontae na Gaillimhe. Tá margadh na Breataine an-tábhachtach agus tá borradh ag teacht faoi mhargadh na hEorpa agus Mheiriceá Thuaidh. Léiríonn taighde nach mór aird a thabhairt ar na buanna áilleachta, staire agus cultúrtha atá ag an gcontae, in aon phlean nua turasóireachta ar uisce.

Apart from angling and island visiting, there is relatively little awareness of, or participation in, water-based activity tourism in Galway city and county. Evidence suggests however that there is latent demand for the development of further water-based tourism products, including associated on-shore leisure activities.

The British market is, and is likely to continue to be, very important to tourism in the West. The European and North American markets are also important. Although the volume of domestic visits has declined since 1998, this market remains a vital source of business for tourism enterprises in Galway city and county.

Market research suggests that the county's strengths in relation to scenery, history and culture should be to the fore in the development of any new water-based tourism products for overseas visitors. There is a need to counter perceived barriers to participation through the provision of better information and marketing, as well as through strong and visible control of pollution and other environmental threats.

2.7 Athbhreithniú Polasaí agus Straitéise / Background policy and strategy review

Rinne na comhairleoirí staidéar ar na doiciméid thíosluaite le linn a dtaighde margaíochta agus nótaíleadh na príomhghnéithe a bhí iontu:

- Tá forbairt le déanamh ar an turasóireacht ar uisce, agus níl ceantar an lathair ullmhaithe mar ba chóir.
- Tá treoirlínte airgeadais leagtha síos chuige sin.
- D'fhéadfaí an turasóireacht ar uisce a chomhtháthú go héasca le áiseanna atá ar fáil cheana féin.
- Aithnítear Cathair na Gaillimhe, An Clochán, Cloch na Rón, Béal Átha na Sluaghe agus Port Omna mar lárionaid forbartha.
- Ní mór cothú buan a thabhairt don tionscail, agus caithfear plean a ullmhú chun bainistiú a dheánadh ar chuariteoirí agus ar áiseanna iompair, go háirithe chuig oileáin na Gaillimhe.
- Aithnítear na fadhbanna inmharthanachta, go háirithe faoin tuath, mar gheall ar sheasúracht na turasóireachta agus an líon beag turasóirí a thagann.

The consultancy team undertook a review of latest policy and strategy developments, locally, regionally and nationally. The following documents were reviewed:

National strategy documents

- *Ireland: National Development Plan 2000-2006* (Government Publication).
- *Tourism Development Plan 2000-2006* (Bord Fáilte).
- *Sustainable Development: A Strategy for Ireland* (Department of the Environment & Local Government).
- *Investment Programme 2000-2006 for the Water-based Tourism and Leisure Sector in Ireland* (Marine Institute, 1999).
- *A Marine Research Technology Development and Innovation Strategy for Ireland* (Marine Institute, 1998).
- *A Development Strategy for Marine Leisure Infrastructure* (Marine Institute, 2001)
- *Achieving Sustainable Growth: Development Strategy for Inland Fisheries* (Central Fisheries Board).
- *National Canals and Waterways Strategy* (Office of Public Works)
- *Consultative Document on the Future of Ireland's Inland Waterways* (Heritage Council).

- *Ireland's Environment: A Millennium Report* (Environmental Protection Agency).

Regional/County Strategy Documents

- *Blueprint for Tourism Development in the West* (Western Development Commission).
- *Tourism Development Strategy 2000-2006* (Ireland West Regional Tourist Authority).
- *Sustainable Tourism Strategy for Árann* (Galway County Council).
- *Assessment of Piers, Harbours, and Landing Places in County Galway* (Galway County Council).
- *Galway Islands Plan* (Galway County Council).
- *Island Development Policy* (Údarás na Gaeltacht).
- *County Development Plan for the County of Galway 1997-2002*.
- *Galway City Development Plan 1999*.
- *Ballinasloe Draft Development Plan 2001*.

Key considerations noted from these reports:

- There is a significant strategic commitment to developing water-based tourism.
- There is recognition that the West is under-performing.
- Clear strategic funding guidelines are in place.
- The opportunity exists for water-based tourism to dovetail with many strategic themes identified (e.g. clustering, special interest tourism, environment related tourism, waterways).
- The identification of Galway City, Clifden, Roundstone, Ballinasloe and Portumna as growth cluster nodes.
- The need for real commitment to sustainability is identified at the highest level.
- The need for visitor management plans and consideration of carrying capacities, particularly in relation to Galway's islands, is highlighted.
- There is recognition of viability difficulties, particularly in rural areas. These difficulties are due to the seasonal nature of tourism and low volumes of visitors, as well as a need for greater focus on the needs of the market.

2.8 Iniúchadh ar an Timpeallacht / Audit of natural and built environment

Rinneadh iniúchadh ar an timpeallacht nádúrtha agus forbartha i dtaca le pleanáil, rochtain, na háiseanna

atá ar uisce, gnéithe cultúrtha ar uisce, agus cosáin coisithe.

A thorough understanding of the natural and built environment was essential in order to establish the site opportunities and constraints for future sustainable development. Information was obtained by means of desk research, fieldwork and consultations. Information about the county was gathered covering:

- statutory planning context:
 - designations/landscape character/nature conservation;
- access and circulation;
- lakes, rivers, coasts
 - existing and proposed facilities & activities;
- water-based cultural/heritage features;
- walking routes.

2.9 Turasóireacht uisce i nGaillimh – Buntáistí, Laigí, Deiseanna agus Bagairtí / Water-based tourism in Galway – Strengths, Weaknesses, Opportunities and Threats

Seo a leanas achoimre ar na torthaí a bhí ar an taighde a rinneadh mar chuid den staidéar turasóireachta:

The findings of the research phase of the study process can be summarised in a SWOT Analysis as follows:

2.9.1 Buntáistí / Strengths

An Timpeallacht

Tá acmhainní áille nádúrtha ag an gceantar, go háirithe i gConamara agus thart ar Loch Coirib, agus an-tóir ag na cuairteoirí orthu. Tá beagnach leath den chontae faoi chosaint speisialta timpeallachta.

Bunús Turasóireachta

Tá méadú leanúnach ar an turasóireacht go hlarthar na hÉireann le deich mbliana anuas, go speisialta i gcontae agus i gcathair na Gaillimhe. Tá neart lóistín ar fáil, go háirithe sa gcathair agus le cósta. Tá tóir faoi leith ar chúrsaí cultúrtha ar Oileáin Árann agus i

nGaeltacht na Gaillimhe. Tá pobal óg chathair na Gaillimhe ag méadú go suntasach agus beidh siadsan sa tóir ar eachtraí ar uisce chomh maith.

Aiseanna atá ar uisce cheana féin

lascaireacht slaithe agus cuairt ar na hoileáin na príomháiseanna atá ar fáil, agus an-tóir ar Loch Coirib. Tá turais bhreátha bád ar fáil, agus forbairt leanúnach á dhéanamh ar na háiseanna i gCaoláire Rua.

Environment

The magnificent natural resources of the county include its rugged coastline, culturally rich islands, beautiful mountains and the limestone plain stretching to the Shannon basin. Visitors are aware of this rich environment and place a high value on it; the Connemara landscape is particularly admired, while Lough Corrib is Ireland's second largest inland lake. Almost 50% of the county is thus zoned for special environmental protection through European designations such as Special Areas of Conservation and Galway County Development Plan designations such as Areas of Recreational Amenity.

Established tourism base on which to build

The West of Ireland has a very positive image and has seen steady tourism growth over the past decade. Galway city and county have been at the forefront of this expansion. Both have a strong accommodation base, and this is particularly the case in Galway city and along the coast. The area is an established heritage and cultural tourism destination, with the Aran Islands and Galway Gaeltacht being seen as unique cultural and heritage icons. Galway city, Inis Mór and Connemara are well established tourism destinations, as is the River Shannon on the county's eastern boundary. Galway city is providing a growing, young population which will increase further the demand for water-based activities.

Existing water-based activities

Angling and island visiting are Galway's best known water-based tourism products. Lough Corrib in particular has an excellent reputation as an angling destination. Good wild brown trout fishing can be found in many locations, and there is potential to develop this further. Some excellent boat trips and ferries are now available. The Killary Harbour area has a steadily strengthening activity-product cluster.

2.9.2 Laigí / Weaknesses

An Timpeallacht

Tá laghdú mór tagtha ar an stoc bradán agus liathán atá sa bhfarraige, cé nach bhfuil aon deacracht ar Loch Coirib. Bíonn fadhbanna le truailliú uisce agus le dramhaíl sa gceantar agus bíonn Inis Mór faoi bhrú millteach ag buaic an tséasúir turasóireachta. Tá scrúdú a dheánadh ar na fadhbanna iascaireachta faoi láthair.

Íomhá

Níl Gaillimh aitheanta mar ionad gníomhach turasóireachta go fóill. Tagann na turasóirí, téann siad ó áit go háit ach ní fhanann siad i bhfad in aon áit. Is deacair aon eolas a fháil faoi imeachtaí ar uisce agus is beag margaíochta atá déanta ar sin. Na gníomhaíochtaí atá ann, is minic gur ar chumainn nó ar ghrúpaí speisialta a bhíonn siad dírithe, seachas díriú an gnáth-thurasóir a bhfuil an áit ag braith air.

Forbairt

Níl ann ach go bhfuil tús á chur leis an bhforbairt ar an turasóireacht ar uisce. Fós féin tá laigí ann maidir le:

- Easpa taighde margaíochta agus leibhéal íseal infheistíochta sa bhonneagar.
- Easpa lárionad fiontraíochta, drochbhealaí taistil agus droch-chomharthaí bóthair.
- Easpa infheistíochta i dtraenáil agus gá le forbairt leanúnach ar bhainistiú an chósta.

Environment

The severe decline in stocks of wild salmon and sea trout populations has left county Galway with a weakened game angling product. The National Salmon Commission is currently reviewing the management of salmon stocks and is advising the Minister for the Marine and Natural Resources.

It is important to note that stocks of salmon in the Corrib system are healthy and the fishery had an excellent season in 2001. The stocks of salmon in the smaller systems of the west are more problematic and will require careful conservation and management initiatives to protect and boost spawning stocks.

Sea lice control is also a very important issue. Private fishery interests and the Fisheries Boards are anxious

to ensure that sea lice levels on farmed salmon are kept to a minimum during the salmonid smolt run in April and May. It is noted that Ireland has introduced a set of detailed protocols or best practice for the industry to ensure that environmental impacts are kept to a minimum. In the spring of 2001 sea lice levels on farmed salmon in the western region were at a low level. The Marine Institute, in partnership with An Bord Lascaigh Mhara and the aquaculture sector, is also involved in the establishment of CLAMS (Coordinated Local Aquaculture Management Systems) along the western seaboard.

Recent EPA surveys of the fresh waters of the State indicate a deterioration in the quality of aquatic ecosystems and highlight eutrophication as the main problem to be addressed. In Galway, unauthorised dumping and litter, particularly in coastal areas, can also be a problem.

Perception

It is clear that Galway is not currently seen as an activity tourism destination, rather it is seen as a touring destination, with most visitors travelling by car and not staying long in any one location. It can be difficult to access information on water-based tourism, and there are low levels of marketing for it. It is often difficult for the visitor to put together the elements of an activity holiday package, as few operators present all-in water-based activity options. Often activities are orientated towards clubs and special interest groups, rather than the general touring visitor, who is the staple of Galway's tourism industry.

Development framework

The strategic planning framework for water-based tourism development is only beginning to be put in place. At the present time weaknesses exist in relation to:

- the absence of specific market research to guide policy;
- low levels of investment over many years (much quay and pier infrastructure dates from the 19th century);
- lack of product clusters of scale;
- access difficulties, including poor roads and inadequate signage;
- little investment in training;
- the need for continued strengthening of

integrated coastal zone management processes to ensure the interests of tourism, angling, and scenic amenities are taken into account.

2.9.3 Deiseanna / Opportunities

Margaíocht

Léiríonn taighde margaíochta go n-éireodh le áiseanna turasóireacht ar uisce ach iad a bhunú ar na gnéithe atá ann cheana féin. Tá éileamh ar tháirgí a theann leis an timpeallacht agus tá gníomhaíochtaí nua ag teacht chun cinn. Tá gá le forbairt ar na hearraí speisialta atá ar fáil cheana féin agus leathnú le déanamh ar na hacmhainní turasóireachta ar uisce.

Frámaíocht na forbartha

Léiríonn na polasaithe náisiúnta an gá atá le forbairt ar ghníomhaíochtaí turasóireachta ar uisce, agus tá airgeadú déanta ar sin sa Phlean Náisiúnta Forbartha. Tá na bóithre i nGailimh ag fheabhsú agus ba mhór an bhuntáiste tuilleadh infheistíochta a dhéanamh ar ghréasán muiríneacha feadh chósta na hÉireann. Tá obair á dhéanamh ar chéibheanna agus ar fhánáin faoi láthair, agus ar fhearais séarachais agus dramhaíle. Tá clár cosanta á ullmhú freisin chun cosc a chur le aon laghdú eile ar chaighdeán an uisce talún, agus chun é a fheabhsú le himeacht ama.

A market-led approach

Market research indicates that water-based tourism products which can build on existing interest in the landscape, culture and environment of Galway are likely to succeed. There is increasing demand for quality products which are environmentally sound, and new product opportunities are emerging (eco tourism, marine mammal watching, etc). There is scope for further development of Galway's current special interest product base and to widen the usage of the water-based tourism resource (the lakes, rivers and coastline).

The Development Framework

National strategic policies highlight the importance of developing water-based tourism activities. This is backed up by funding allocations in the National Development Plan, in particular in the tourism sub measures. Galway has an improving road network and can also benefit from the increasing investment in a network of marinas around the coast of Ireland. A pier

and slipway improvement programme is underway and investment in waste treatment facilities will help to protect the water-based resource. The whole of County Galway will form part of the Western River Basin Management Project, the objective of which is to establish an integrated monitoring and management system for all waters. The project also aims to develop a programme of measures which will prevent further deterioration of ground water quality and enhance it over time.

2.9.4 Bagairtí / Threats

An Timpeallacht

An baol is mó a bhainfeadh le haon fhorbairt sa turasóireacht ar uisce ná easpa cosanta a bheith ag an acmhainn uisce féin. Is furasta é a thruailliú le feirmeoireacht, le tionscail agus le dramhaíl tí. Dhéanfadh turasóireacht dochar don uisce mura mbeadh ullmhúchán ceart déanta don líon cuairteoirí a bheadh ag teacht chun na háite. Ní mór aird a thabhairt don stoc éisc nádúrtha agus na feirmeacha éisc a bhainistiú go cúramach.

Saothar

Cosúil le gach saghas turasóireachta, beidh gá le soláthar maith d'oibrithe oilte chun tabhairt faoin turasóireacht ar uisce.

Rochtana

Is minic go mbíonn gá le dea-thoil úinéirí talún chun dul chuig cuid de na hacmhainní mara. Mura mbeidh an dea-thoil sin le fáil cuirfear as don turasóireacht ar uisce in áiteacha ar leith.

Environment

Water-based tourism is particularly vulnerable to pollution from agriculture, industry and domestic waste. The main threat to the future development of this sector would be failure to provide adequate protection from sources of pollution.

Tourism can damage the environment where carrying capacities are not managed in a sustainable manner.

Our stocks of game fish, notably sea trout and salmon, are particularly sensitive to pollution and over-exploitation. Careful management and habitat

protection must be assured for sustainable angling tourism.

Labour

Water-based tourism, like other kinds of tourism, requires a supply of well trained staff. Labour shortages can also be a threat.

Access

Access to the marine resource often requires the goodwill of land-owners. Should this be withdrawn, the development of water-based tourism in some locations could be threatened.

3.0 PLEAN STRAITÉISEACH / THE STRATEGIC APPROACH

Déantar achoimre sa gcaibidil seo ar na hathruithe atá riachtanach, agus ar na nithe atá le cur i gcrích, chun forbairt a dhéanamh ar an turasóireacht uisce i gcathair agus i gContae na Gaillimhe.

Moltar aird a dhéanamh do na laigí atá léirithe, agus gníomhú dá réir.

Chun buntáiste iomlán a bhaint as na hacmhainní iontacha nádúrtha atá ag Gaillimh, agus chun díriú ar na héilimh nua atá ag na custaiméirí i leith na turasóireachta agus i leith áiseanna caithimh aimsire, caithfear díriú ar na pointí atá tugtha chun suntais chun forbairt cheart a dhéanamh ar an turasóireacht uisce agus ar na háiseanna saoire atá sa gcathair agus sa gcontae. Beidh gá le forbairt bhuan leanúnach chun an méid sin a chur i gcrích.

3.1 Introduction

This chapter outlines the changes required and indicative actions needed to develop a strengthened water-based tourism product in Galway city and county.

3.2 Converting Weaknesses into Strengths

The strategic approach will need to address the following identified weaknesses. Potential strategic actions are suggested as follows:

Environmental Issues

WEAKNESSES

• Decline in salmon stocks

INDICATIVE ACTION

Action must centre on the protection of the natural environment. The continued enhancement of spawning grounds, protection of riverine environments, effective environmental control measures in fish farms and sustainable commercial fishing practices, are all actions required if Galway's wild salmon population is to be allowed to recover and once again be a mainstay of its tourism economy.

• Decline in sea trout stocks

INDICATIVE ACTION

The loss of one of Ireland's finest sporting fish has had a significant effect on tourism in County Galway, particularly in Connemara. Control of sea lice infestations on salmon farms (particularly in the March/May period) may assist in promoting the recovery of sea trout stocks. (EPA Millennium Report).

• Islands' over-dependence on day trip market

INDICATIVE ACTION

Development should be supported where it is environmentally sustainable, in line with island community wishes, and based around increasing overnight stays on the islands.

Perceptions

WEAKNESSES

• Low level of Marketing

INDICATIVE ACTION

In order to be effective, marketing must be well-funded, strategically driven and sustained over time. Marketing and promotion of Galway as a water-based tourism destination are currently undertaken by individual operators, which results in a low level market impact. A networking approach must be applied, integrating water-based tourism activities with mainstream tourism products. Promoters of

water-based tourism in Galway require support and direction to achieve economies of scale and real market impact. The development of an eco-tourism brand for the West of Ireland, which incorporates water-based tourism, would represent an opportunity for adopting an integrated marketing approach. The appointment of a designated marketing officer would greatly facilitate delivery of a co-ordinated marketing campaign.

- **Galway seen as a touring destination only**

INDICATIVE ACTION

Greater emphasis needs to be given to marketing activities and non-car based tourism options in Galway. Flagship water-based tourism products should be developed in order to make Galway a more attractive tourism destination.

- **Information deficit**

INDICATIVE ACTION

The creation of a user-friendly water-based tourism website for Galway city and county (or the West of Ireland) and the effective promotion of the web site, would help to address the current information deficit. Training, which increases awareness of the tourism options available in Galway should be provided to TIC (Tourism Information Centres) and hotel front-of-house staff.

- **Club orientation of many activities**

INDICATIVE ACTION

Much activity tourism (including water-based activity) is club-based. This has its advantages in that it allows for selective niche marketing. In order to attract holiday visitors in greater numbers however, upgraded facilities and a re-orientation of marketing to address the holiday sector will be required.

Development Framework

WEAKNESSES

- **Lack of market research**

INDICATIVE ACTION

The lack of detailed market research into key water-based tourism activities such as boating, angling, diving and wind surfing is a national issue which needs to be addressed. Galway, in conjunction with Ireland West, should establish a pilot research initiative which would develop an activities user-profile and benchmark visitors' perceptions and satisfaction levels.

- **Low levels of investment in water-based tourism**

INDICATIVE ACTION

Significant investment in new and upgraded water-based tourism facilities will be required in the future.

- **Lack of product clusters of scale**

There is a strategic need for the development of clusters of water-based activities throughout Galway. The case studies, presented in Chapter 5, identify a number of indicative clusters and locations.

- **Poor access to the water**

INDICATIVE ACTION

Galway County Council and the Department of Arts Heritage, Gaeltacht and the Islands have prepared a detailed audit of coastal access points for County Galway. The study prioritises development for a number of sectors including water-based tourism. A similar approach to improving access to Lough Corrib and other inland waters would be desirable. The Lough Corrib Navigation Authority may have a role to play in this regard.

- **Increased investment in training needed**

INDICATIVE ACTION

Lack of training facilities and specific training modules for water-based tourism activity providers is a key issue, at national and local level. There is an opportunity for educational institutions and the private sector in Galway to develop specific training modules to address sectoral training needs. (CERT's Marine and Countryside Guiding Programme is an example of one such training initiative).

3.3 Capitalising on Opportunities

To capitalise on Galway's significant natural strengths and to cater for changing tourism and leisure demand, it will be necessary to address the following areas in order to develop the potential of water-based tourism and leisure in the city and county. A real commitment to sustainable development will be essential.

To be Market-led

OPPORTUNITIES

-
- **Market interest in water-based tourism products with culture/heritage dimension**
-

INDICATIVE ACTION

Subject to individual feasibility analysis, initiatives based on the following themes should be developed:

- heritage and angling
- heritage of Lough Corrib
- industrial heritage of Galway's canals and waterways
- culture and heritage of the Gaeltacht and islands
- culture and heritage of traditional sailing craft (e.g. Galway Hookers)

-
- **Market interest in new products**
-

INDICATIVE ACTION

The development of eco-tourism, marine mammal watching and other emerging products should be encouraged. Synergies with existing accommodation and licensed boat operators should be developed, to provide new market-led tourism packages.

-
- **Market interest in developing existing products**
-

INDICATIVE ACTION

Continued investment in the angling resource is essential. Opportunities exist for developing new waters for rod angling, and wild brown trout fishing can be developed in a number of areas. Existing water-based activity product providers should be encouraged to expand their businesses.

To Integrate with Strategic Development Frameworks

OPPORTUNITIES

-
- **National Development Plan (2000-2006)**
-

INDICATIVE ACTION

The National Development Plan (2000-2006) sets out five tourism sub measures. All of these are of some relevance to the development of water-based tourism. The five sub measures are:

- Development of Major Attractions
- Special Interest Pursuits
- Tourism/Environmental Management
- Marine Tourism
- Tourism/Recreational Angling

-
- **Opportunity to cluster**
-

INDICATIVE ACTION

Galway city, Clifden, Roundstone, Portumna and Ballinasloe are identified in various strategies as potential growth clusters for tourism development. In addition, Killary Harbour has a developing cluster of water-based tourism products. Ceántar na nOileán has been selected by the government as a pilot area for developing self-sustaining clusters of marine tourism in small compact coastal areas.

-
- **Improved access to slipways, harbours etc.**
-

INDICATIVE ACTION

As access to the water is improved, increased use for tourism and leisure will result. It is important that this increased usage is planned for in a controlled manner.

This applies particularly to sensitive angling destinations such as Lough Corrib.

-
- **Upgraded waste water treatment facilities will improve water quality**
-

INDICATIVE ACTION

The bathing water quality and visual amenity of Galway's coastal waters will improve significantly. Greater usage of the water-based tourism resource must be planned to take advantage of improved

environmental conditions.

-
- **More marinas will be developed around the coast**
-

INDICATIVE ACTION

Plans for marina development are at an advanced stage for Galway Docks, Rinville, Roundstone and Kilronan. This new network of marina locations will increase leisure boating activity in the area and provide improved facilities for visiting boats.

-
- **Sustainable salmon fishing practices**
-

INDICATIVE ACTION

The introduction, implementation and careful monitoring of prescribed sustainable salmon fishing practices is vital if Ireland is to aid the recovery of salmon stocks. The assurance of a top-quality salmon angling product would result in a significant net economic return as a result of increased tourism angling spend.

-
- **Western River Basin District Management Plan**
-

INDICATIVE ACTION

This project will help to ensure the protection and enhancement of County Galway's inland and coastal waters.

4.0 MOLTAÍ AIDHME AGUS STRAITÉISE / STRATEGIC FRAMEWORK

4.1 Aidhmeanna / A Vision for the Future

Tá deiseanna maith forbartha ag cathair agus ag contae na Gaillimhe le feabhas suntasach a chur ar an tionscal turasóireachta uisce. Beidh gádh le plean straitéiseach infheistíochta a fheidhmiú go háirithe i leith ollfhorbairtí leis an deis seo a thapadh. Cuideoidh straitéis mar seo le scaipeadh tograí tríd an gceantar maraon le breis turasóirí a mhealladh go dtí an réigiún.

Galway, both city and county, has significant potential to develop water-based tourism. A strategic investment plan will be required to enhance the existing product base and to develop a number of flagship initiatives. This strategic approach will act as a catalyst for creating clusters of water-based activities, encourage regional spread and attract increased domestic and overseas visitors to the area.

4.2 An Bealach Chun Cinn / The Way Forward

Caithfear Gaillimh a fhorbairt mar lárionad turasóireachta agus caithimh aimsire don turasóireacht uisce. Tá trí phríomhréimse de pholasaí straitéise ina gcuid lárnaigh den aidhm sin:

- (i) Méadú agus caomhnú a dhéanamh ar an timpeallacht uisce.
- (ii) Forbairt táirgí, bunaithe ar lárionaid ghníomhaíochtaí turasóireachta uisce.
- (iii) Margaíocht, oiliúint agus bainistiú.

To deliver on this vision, Galway must position itself as a primary tourism and leisure destination for water-based tourism. There are three main areas of strategic policy which are central to achieving this goal:

- (i) Enhancement and protection of the marine and riverine environment.
- (ii) Product development, centred on clusters of water-based tourism activity.
- (iii) Marketing, training and management.

4.3 Méadú agus Caomhnú a dhéanamh ar an Timpeallacht Uisce / Enhancement and Protection of the Marine and Riverine Environment

4.3.1 Réamhrá / Introduction

Ní mór gníomhú ag an leibhéal náisiúnta i gcás a lán de na cásanna a bhaineann leis an timpeallacht uisce, agus tá siad sin luaite go sonrach san EPA Millennium Report. Tá ról lárnaigh ag na húdaráis áitiúla i dtaca lena lán de na cásanna timpeallachta. Mar sin féin, tá sé tábhachtach go dtabharfaí aird ar chúinsí timpeallachta agus go gcuirfí polasaithe maithe pleanála i bhfeidhm ag gach céim de bhainistiú ceart timpeallachta agus forbartha.

Many issues in relation to the overall marine and riverine environment require action at national level, and these are outlined in detail in the EPA Millennium Report. The role of local authorities in relation to environmental issues is central. It is also important that environmental awareness and good planning policies are adopted at every level of tourism management and development. Within this report, detailed consideration has been given to environmental issues in relation to all proposed developments and recommendations.

4.3.2 Moltaí – An Timpeallacht / Recommendations – Environment

Protection of Galway's Angling Resource

The National Development Plan Recreational Angling Measure should be utilised to fund environmental management initiatives such as river and stream enhancement, stock management and environmental awareness programmes. Sustainable fishing practices must be implemented by the commercial and recreational angling sector to protect the salmon stocks. There must be continuous improvement in the management of fish farms so as to minimise the environmental impacts on riverine and coastal habitats and biodiversity.

Water Quality

There should be continuous investment made in improving effluent treatment facilities, and the impacts of non-point sources of pollution should be more closely monitored and controlled. River Catchment management plans, including measures to reduce sources of nutrient enrichment resulting in eutrophication, should be drawn up and implemented for all salmonid rivers and lakes in Galway.

Coastal Waters Zone Management

Integrated Coastal Zone Management (ICZM) should continue to be developed. As a pilot initiative, the scope of the C.L.A.M.S. programme should be broadened to include the water-based tourism and leisure sector. The needs of the tourism sector should be strongly represented in any ICZM forum.

Inland Waters Zone Management

It is recommended that an integrated management framework, similar to ICZM should be developed for inland waters and lakes. Lough Corrib, Lough Derg and Lough Rea would, in particular, benefit from such a co-ordinated environmental management system. The role of the Lough Corrib Navigational Authority should be reviewed so as to strengthen environmental management of this important tourism angling resource.

Litter

It is recommended that continued efforts be made to foster pride in Galway's rivers and coastlines so that littering will be discouraged.

Eco-tourism

The development of an eco-tourism brand for Galway could be utilised to improve the environmental performance of the tourism sector. It is recognised that tourism eco-labels have the potential to raise environmental awareness of the main stakeholders in tourism, industry, local authorities and consumers.

4.4 Forbairt Táirgí / Product Development

4.4.1 Réamhrá / Introduction

Éilíonn an straitéis seo go ndéanfaí sraith ollfhorbairtí agus nuair a chuirfear iad sin in éineacht leis an táirge atá ar fáil cheana féin, cuirfear cathair agus contae na Gaillimhe ar an mapa mar ionaid ardchaighdeáin turasóireachta uisce. Roghnaíodh ionaid na bhforbairtí sin chun cuidiú le bunú lárionaid turasóireachta uisce, agus chun an fhorbairt a scaipeadh ar fud an réigiúin. Tugann an chuid seo den tuairisc eolas faoi na cineálacha forbartha ba chóir a dhéanamh sna lárionaid éagsúla, bunaithe ar anailís chruinn indéantachta. Baineann na moltaí don turasóireachta mara le:

- (i) Cathair na Gaillimhe
- (ii) Contae na Gaillimhe

Tugtar breis mioneolais faoi roinnt de na moltaí forbartha i bhfoirm cás-staidéir in Caibidil 5: Samplaí de Thionscnaimh Forbartha. Tugann na cás-staidéir sin léargas maith ar an acmhainn atá sa gcontae, ach tá sé tábhachtach go dtuigfí freisin go bhfuil eolas tugtha sna moltaí seo a leanas faoin a lán deiseanna forbartha eile, atá chomh tábhachtach céanna.

This strategy calls for the development of a series of flagship initiatives which, together with the existing product, will put Galway on the map as a high quality water-based tourism destination. The locations for these initiatives were selected to help create clusters of water-based tourism and to encourage regional spread. This section of the report proposes a number of cluster locations. The initiatives outlined for development are indicative only. Detailed feasibility studies would need to be undertaken to determine the most appropriate development options. Development initiatives are outlined for:

- (i) Galway city
- (ii) Galway county

A number of flagship projects are presented as Case Studies in **Chapter 5: Examples of Potential Development Projects**. These case studies are indicative of the county's potential. Many other equally important potential development opportunities are outlined in the recommendations below.

4.4.2 Forbairt Táirgí / Recommendations - Product Development

(i) Cathair na Gaillimhe / Galway City

Tá sár-acmhainn uisce ar fáil timpeall ar chathair na Gaillimhe. Áirithe ansin tá Bóthar na Trá agus Cuan na Gaillimhe, Dugaí na Gaillimhe, abhainn na Coiribe, na canálacha agus srutháin na muilte atá ag rith tríd an gcathair, agus na bána taoide atá ansin, ar nós Loch an tSáile agus Loch Roisín. Nuair a bheidh an córas séarachais ar Oileán na gCaorach críochnaithe, i ndeireadh na bliana seo, cuirfear feabhas mór ar chaighdeán an uisce agus tabharfaidh sin deis chun breis forbartha a dhéanamh ar an turasóireacht uisce. Tá sé d'acmhainn ag Cuan na Gaillimhe a bheith ina lárionad turasóireachta uisce chun treis a chur leis an gcóras maith turasóireachta atá ar mórthír cheana féin.

Galway city is surrounded by a magnificent water-based resource. This includes Salthill and Galway Bay, the Galway Docks, the River Corrib, the canals and mill races which run through the city and the tidal bays such as Lough Atalia and Lough Rusheen. With the completion of the Mutton Island sewage treatment plant in late 2002, significant improvements in water quality will allow for further development of water-based tourism. Galway Bay now has potential to become a major centre for water-based tourism, complementing the existing successful tourism sector.

Cathair na Gaillimhe Forbairt Turasóireachta – Moltaí / Tourism Development - Recommendations

Enhanced Marina provision for Galway City

Plans for the provision of a small (26 berth) marina within Galway docks are at an advanced stage, as are plans for a larger marina at Rinville (with the potential for 100 – 200 berths). The provision of additional marina facilities near Galway City is essential if the bay is to achieve national and international recognition as a leisure boating destination. Subject to feasibility, current marina development proposals should be supported.

Eglinton Canal

It is recommended that the Eglinton Canal should be developed to provide waterside promenades, recreational angling and interpretation to stimulate waterside urban regeneration. A circular walk should be created with the construction of the proposed Millennium Bridge north of the salmon weir at Earl's Island. This proposal is examined further as a Case Study in **Chapter 5: Examples of Potential Development Projects (Ref. 5.2)**.

Tourism potential of Galway Docks

Over time, Galway Docks have potential to develop further tourism related activities. The rejuvenation of the docks should be reviewed in the context of integrating marine tourism and recreational activities in this area. It is recommended that a feasibility study should be undertaken which examines the potential for up-grading and enhancing Galway Dock to include tourist accommodation, waterside promenades and amenities, restaurants and retail facilities. Consideration should also be given to the provision of facilities for visiting cruise liners.

Salthill

Salthill is Galway's premier seaside resort and, as water quality improves and environmental enhancements continue, is likely to continue to be a popular centre for water-based tourism. Further developments should build on the existing water-based assets of the resort e.g. the National Atlantaquarium, foreshore facilities and walkways. Opportunities to develop water-based activities which link with the area's strong accommodation base should be encouraged. A thalassotherapy facility may represent an opportunity for the private sector.

Loughs Rusheen and Atalia

The tidal bays east and west of the city have clear potential for tourism development as water quality is improved. An indicative plan to enhance and develop Lough Rusheen as a waterpark providing a range of activities and encompassing a nature reserve is presented as a Case Study in **Chapter 5: Examples of Potential Development Projects (Ref 5.3)**.

Earl's Island and Eglinton Pier

The views of Galway's spectacular salmon weir and the opportunity to take boat trips up the River Corrib are unique water-based tourism assets. There is scope to encourage greater usage of these facilities. Amenity enhancements and the provision of sewage discharge facilities for passenger carrying leisure boats should be prioritised.

(ii) Contae na Gaillimhe / County Galway

Loch Coirib / Lough Corrib

Forbairt Turasóireachta – Moltaí / Tourism Development – Recommendations

Enhancement of Angling resource

Lough Corrib is one of the county's primary water-based tourism assets, with a lake surface area of 17,400 ha. It is central to the county's angling resource and angling tourism is the primary water-based tourism product on the lake at present. Every effort must be made to protect and enhance this tourism resource. An extensive angling development programme has been underway on Lough Corrib in recent years. Trout fishing has improved dramatically and is now achieving its best catches in 20 years. The programme was funded under the Tourism Angling Measure of the Tourism Operation Programme 1994-1999.

The importance of continuing angling enhancement programmes is essential to the strategic development of the angling resource of Lough Corrib. The Tourism and Recreational Angling Measure of the National Development Plan 2000-2006 should be utilised to underpin the following key actions:

- water quality and environment management;
- baseline riverine surveys;
- river and stream enhancement;
- stock management;
- information and marketing.

Lough Corrib Discovery Centre

In addition to angling, many other aspects of Lough Corrib could be exploited for sustainable tourism development. These include:

- Heritage: The area has a rich heritage from prehistoric times to the present day. Field monuments, castles and churches, many of which are located on islands dotted throughout the Corrib, demonstrate this rich heritage.
 - Ecology: The entire area is rich in flora and fauna. Different landscapes are found, from fens and raised bogs in the southern basin, to limestone pavements and glacial hills.
 - Other potential active and passive water-based pursuits include walking, canoeing, heritage visits, bird watching and boating/cruising (although there are some navigational constraints). However, any tourism development initiatives must be sensitive to the needs of the angling sector.
 - It is recommended that the feasibility of creating a flagship Lough Corrib Discovery Centre be investigated, with a view to establishing such a Centre by 2006. The Discovery Centre could portray the rich heritage of angling, navigation and the cultural and natural resources of Lough Corrib. It could also become a National Angling Centre, tracing the history of game angling in the West of Ireland.
-

Oileáin na Gaillimhe / Galway's Islands

Forbairt Turasóireachta – Moltaí / Tourism Development - Recommendations

Carrying Capacities

It is recommended that assessments of island carrying capacities for sustainable tourism be undertaken. The provision of basic infrastructure, which caters for tourism demand and also benefits island communities, must be prioritised.

Encouraging Overnight Stays

It is recommended that activities such as sea angling, diving, marine mammal watching and inter-island transport continue to be developed, with priority being given to products which encourage overnight stays on the islands.

Inishbofin

It is recommended that a sustainable tourism

development plan be drawn up for Inishbofin, in advance of the island coming under pressure from increased visitor numbers as a result of easier access.

Kilronan

The provision of a marina on Inis Mór is being included in plans for the overall re-development of Kilronan harbour. This project is very desirable and should be realised.

Cósta Chonamara / The Connemara Coast

Forbairt Turasóireachta – Moltaí / Tourism

Development - Recommendations

Priority Development Clusters

Four cluster locations have been identified in Connemara:

- South Connemara Fisheries
- Ceántar na nOileán
- Roundstone
- Clifden

South Connemara Fisheries

The re-development of the South Connemara Fisheries, following a decline in salmon and sea trout angling, is recommended. Careful management and stock enhancement measures to boost spawning stock are required, together with a broadening of the tourism product offered. Potential exists to develop wild brown trout fishing, nature watching, and a range of outdoor activities. Further development initiatives are outlined as a Case Study in **Chapter 5: Examples of Potential Development Projects (Ref 5.4)**.

Ceantar na nOileán

Ceantar na nOileáin has been chosen as a pilot location for investment in marine leisure facilities, including marine infrastructure, heritage and health-related facilities. This initiative is elaborated in greater detail in **Chapter 5: Examples of Potential Development Projects (Ref 5.5)**.

Roundstone: Development of Marina Facilities

Roundstone is an important tourist centre visited by numerous pleasure craft including yachts and traditional Galway hookers. It is also a centre for water-based sports and leisure activity. Sea angling is

available nearby. Plans are at an advanced stage for the development of a 34 berth marina at Roundstone, linking in with community facilities. Subject to feasibility considerations, these plans should be supported.

Roundstone: Private Sector Initiatives

It is recommended that further appropriate private sector water-based tourism should be developed in or around Roundstone. New products, which complement current activities and facilities and do not cause displacement of existing tourism enterprises, should be promoted.

Clifden: Private Sector Initiatives

It is recommended that additional water-based tourism facilities and services should be developed in and around Clifden. The expansion of existing operations and the development of new and complementary initiatives should be promoted.

Clifden: Community/ Public Sector Initiatives

The development of a nature reserve around Salt Lake and the development of a linear park along the Owenglin River should be progressed on a phased basis.

An Caoláire Rua / Killary Harbour

Forbairt Turasóireachta – Moltaí / Tourism

Development - Recommendations

Coastal Zone Management in Killary Harbour

Killary Harbour, Ireland's only fjord, attracts many visitors. Overseas and domestic tourists visit the historic angling and touring centre of Leenaun, and increasingly, for activity tourism and to take part in the Connemara Sea Cruise. The harbour is also a centre for fish-farming which is important to the economy. Coastal zone management initiatives, sensitive to the needs of tourism, are essential, and it is recommended that these continue to be developed.

A Watersports designation for Killary Harbour

Killary Harbour should be branded as a national marine watersports destination. The branding should involve Galway and Mayo County Council implementing an agreed development strategy to enhance access, signage and water-based tourism

facilities around the shores of Killary Harbour. It should also involve a high profile marketing campaign.

A National Watersports Centre

Subject to feasibility considerations, the facilities necessary to achieve the status of a National Marine Watersports Centre should be developed in Killary Harbour as a flagship project for water-based tourism in Galway. This concept is elaborated in further detail in **Chapter 5: Examples of Potential Development Projects (Ref 5.6)**.

Port Omna / Portumna

Forbairt Turasóireachta – Moltaí / Tourism Development - Recommendations

Lough Shore Facilities

Portumna has been identified as an area with considerable potential for water-based tourism. Its importance as a tourism gateway to the West on the River Shannon is highlighted in the Western Development Commission's *Blueprint for Tourism Development in the West*. Detailed plans in relation to Portumna are currently being finalised in a joint study on the future development of Lough Derg, involving Galway County Council. It is recommended that the development of on-shore facilities should be prioritised.

Angling - River Shannon

Angling facilities on the River Shannon should be developed to enhance the area's reputation as a major coarse angling centre.

Abhainn an Chláir / River Clare

Forbairt Turasóireachta – Moltaí / Tourism Development - Recommendations

Angling on The River Clare

The River Clare in East Galway has potential for both coarse and game angling development. The Western Regional Fisheries Board is in the process of finalising development plans for stretches of the river, and angling clubs are willing to co-operate in visitor-related development. The Lower Clare in particular has potential to be developed as a world

championship standard course fishing location. It is recommended that the upper reaches of the River Clare should be developed as a model, user-friendly, managed game fishery. The potential for these development options are outlined in further detail in **Chapter 5: Examples of Potential Development Projects (Ref 5.7)**.

Baile Locha Riach / Loughrea

Forbairt Turasóireachta – Moltaí / Tourism Development - Recommendations

Tourist Angling on Loughrea

The inland market town of Loughrea has fine vernacular architecture, interesting ecclesiastic heritage, a vibrant community spirit and a blue flag beach. But the area's greatest water-based asset, Lough Rea itself, is not being exploited to any great extent as a means of encouraging tourism to the area. Potential exists to encourage more tourists to visit Loughrea through the development and marketing of its angling product and other water-based activities. It is recommended that a tourist angling development plan be drawn up in partnership with the Western Regional Fisheries Board and local angling clubs. There is also potential for the development of water-based leisure pursuits which are not in conflict with angling activity.

Béal Átha na Sluaighe / Ballinasloe

Forbairt Turasóireachta – Moltaí / Tourism Development - Recommendations

Improving Linkage between Town and Marina

The market town of Ballinasloe is also identified by the Western Development Commission as a potential tourism gateway to the West. The recent linking of the town to the Shannon Navigation, through the restoration of the Grand Canal link, has been an important strategic development. The full benefit of this investment has yet to be realised because more needs to be done to attract cruising visitors into the town of Ballinasloe and to encourage them, and other visitors, to spend more time and money in the area. Developments which encourage water-based visitors

to spend more time in the town and its new marina should be promoted. Actions such as enhancement of walkways, interpretation, heritage project developments and events should be prioritised.

It is also recommended that by enhancing access facilities and infrastructure, backed up by a focussed marketing campaign, Ballinasloe should be developed as a centre for kayaking and canoeing.

Angling on the River Suck

It is recommended that game and coarse angling facilities on the River Suck be raised to an international standard, that access to tributary rivers be improved and a loop walkway provided. These recommendations are presented as a Case Study in **Chapter 5: Examples of Potential Development Projects (Ref 5.8)**.

Cinn Mhara / Kinvara

Forbairt Turasóireachta – Moltaí / Tourism Development - Recommendations

Improving Access

Kinvara is a popular tourist village with a very attractive harbour on the main tourist route from Galway to the Burren. It is the location for the annual Galway Hooker Festival, a splendid sight and an established water-based tourism event. In line with the Galway Coastal Audit, priority should be given to improving access to the water and providing mooring facilities for visiting boats.

Private Sector Development

Private sector operators should be encouraged to establish a cluster of water-based tourism products and activities, ideally linked to accommodation in and around Kinvara.

Water- Based Events

The development of Kinvara as a destination for water-based events should be supported. These events should build on the existing Galway Hooker Festival by encouraging further gatherings of traditional crafts and appropriate shore-based events

4.5 Margaíocht, oiliúint, bainistiú - cur chuige comhtháite / Marketing, training, management - An Integrated Approach

4.5.1 Margaíocht ar an turasóireacht uisce /Marketing of water-based tourism

Partnership approach to Marketing

Effective marketing is a key strategic requirement if Galway is to position itself as a premier water-based tourism destination in Ireland. It is often difficult to secure sufficient, sustained funding for regional and sub-regional marketing, and the challenge of “putting Galway on the map” as a water-based tourism destination should not be under-estimated.

It is recommended that a broadly based consortium, representing all relevant Agencies with a marketing role together with private sector tourism stakeholders, should be established to secure a commitment to funding a water-based tourism marketing programme for Galway.

Marketing Officer

It is recommended that a tourism marketing officer should be appointed with responsibility for co-ordinating an integrated strategy for marketing and promoting water-based tourism.

Eco-Branding

It is recommended that a quality branding system, ideally based on eco-tourism principals should be piloted in County Galway.

Regional Partnerships

In order to market water-based tourism and to effectively bring about a marketing campaign of sufficient scale and weight, it is recommended that a strategic partnership be established with other counties in the West. The support of the Western Development Commission tourism programme should be sought for such an initiative.

Strategic Marketing Plan

A strategic marketing plan for water-based tourism in the West of Ireland should be drawn up, based on detailed consumer research. It should include an e-based marketing strategy.

4.5.2 Sonraí taighde réigiúnach / Regional research data

Market Research

There is a need to collect more sectoral tourism data at regional and national level in order to make informed marketing and product development decisions. At present, little information is available at individual product level. It is recommended that Ireland West Tourism and Bord Fáilte ensure that reliable market research for water-based tourism is available at local and national level.

4.5.3 Oiliúint don turasóireacht uisce / Training for water-based tourism

Training Review

The need for training in marketing, customer care, business skills and management of specific activities has been identified. It is recommended that NUI Galway, Galway / Mayo Institute of Technology, CERT, Teagasc and others, review the range of training options available in the West and develop specific tourism training modules for the sector.

4.5.4 Pleananna do bhainistiú na loch / Lake management plans

Loughs Corrib, Derg and Rea

In order to maximise water-based tourism potential and to protect the environment and the interests of angling, it is recommended that Lake Zonal Management Plans be drawn up for Loughs Corrib, Derg and Rea following consultation with all potential user groups.

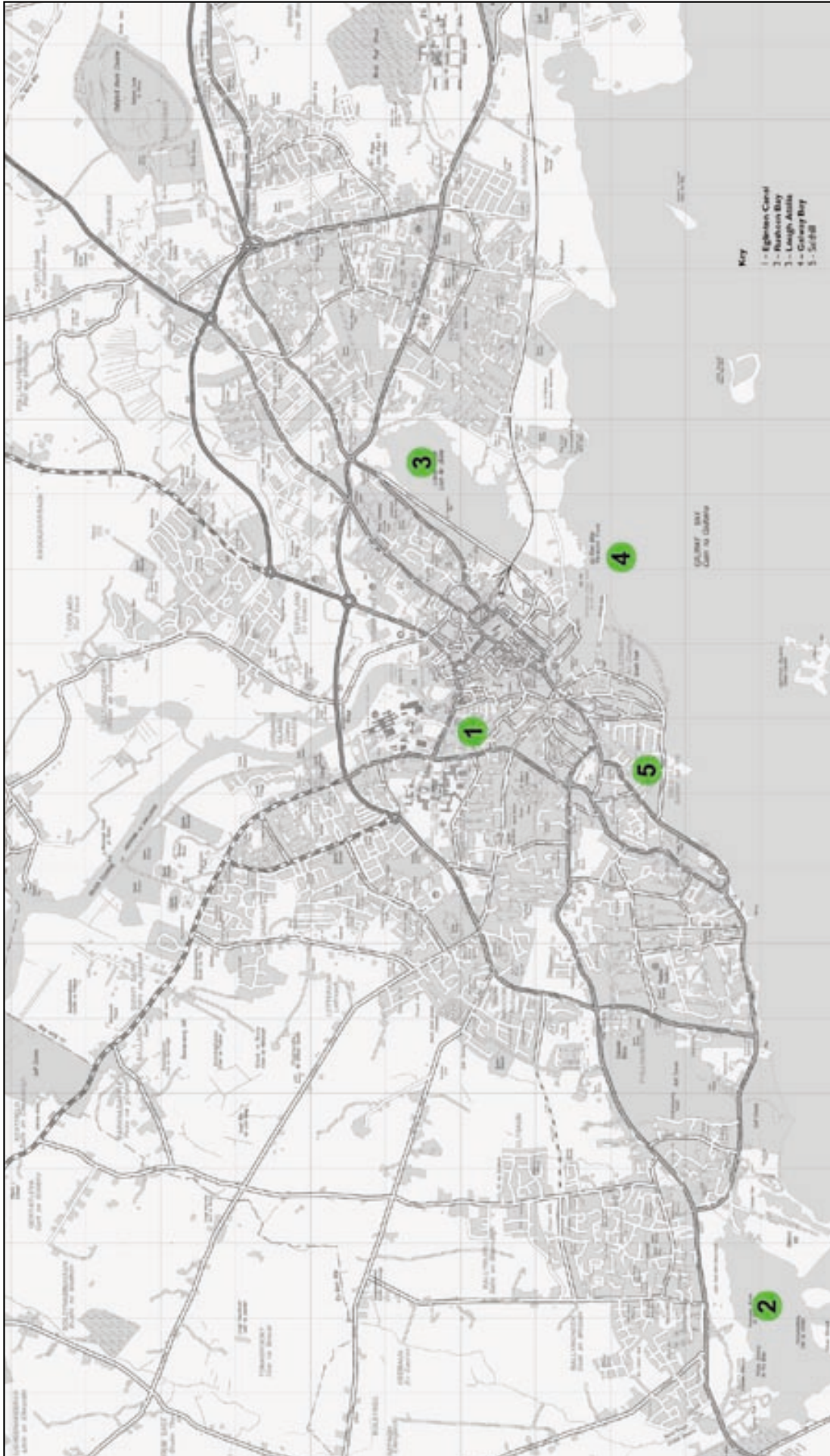
Review of Lough Corrib Navigation Authority

Lough Corrib is one of Galway's finest water-based tourism assets, and its effective environmental management is a key recommendation of this study. At present, management arrangements for zoning of activities, control of harbours and supply of moorings, navigation marking and safety, sewage discharge monitoring, control of noise, speed and wash from motorised craft, are not satisfactory. In view of the unique importance of Lough Corrib, it is recommended that the structure, role and resources of the Lough Corrib Navigation Authority be reviewed.

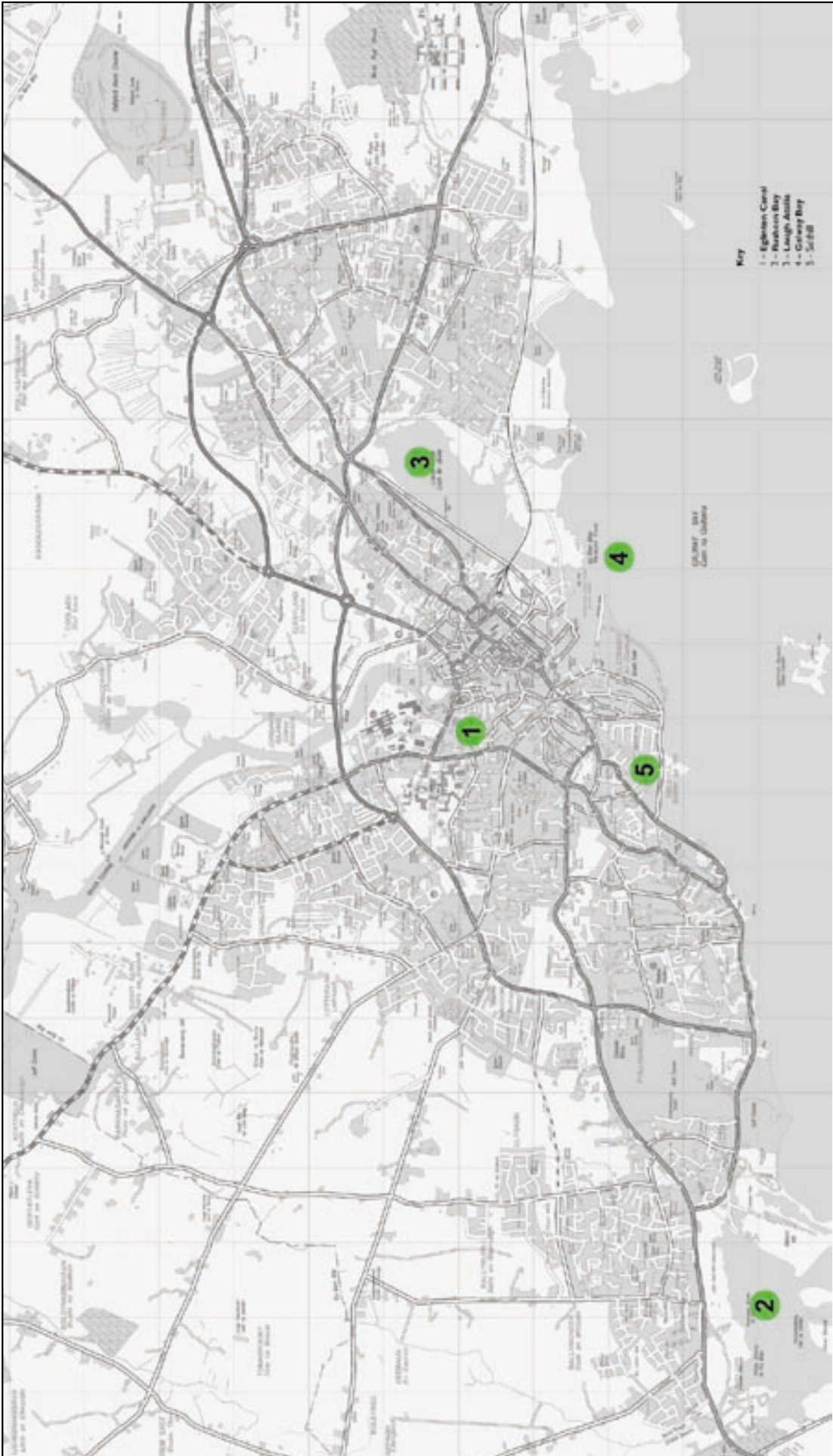
4.5.5 Pleanáil na forbartha don turasóireacht uisce / Development planning for water-based tourism

Integrated Development Planning

It is recommended that the Galway County Development Board and the Galway City Development Board strategies, and those of other planning and development agencies, should have regard to the recommendations of this strategy.



Map 3
Ionaid Molta do Thogral i gCathair na Gaillimhe
Proposed Project Locations in Galway City
(By kind permission of Ordnance Survey Ireland)



Map 4
Ionaid Molta do Thograí i gCondae na Gaillimhe
Proposed Project Locations in County Galway
(By kind permission of Ordnance Survey Ireland)

5. SAMPLAÍ DE DHEISEANNA FORBARTHA / EXAMPLES OF POTENTIAL DEVELOPMENT PROJECTS

5.1 Réamhrá / Introduction

Seo breis eolais faoi sheacht dtogra a d'fhéadfaí a fhorbairt. Bheadh plean gnó ag teastáil dá mbeifí ag tabhairt faoin obair amach anseo. Níl sna costais atá luaite ach meastacháin agus níl aon chinnteacht faoi na foinsí airgeadais atá luaite. Léirítear freisin cuid de na cúinsí a bheadh le cur san áireamh dá rachfaí ar aghaidh leis an bhforbairt.

This chapter proposes a number of flagship development options which are presented as case studies. It should be noted that these case studies and associated costs estimates are indicative only, and do not include detailed assessment of their feasibility. To progress these proposed initiatives and to attract investment and grant aid, the development of a full business plan will be required in all cases. While potential funding sources are indicated for each case study, formal applications for support cannot be progressed until feasibility studies are complete, viable business plans prepared and national/regional funding schemes are in place. In presenting these case studies, it is intended to illustrate the types of project which will capitalise on Galway's potential as a water-based tourism destination. The case studies also explore the range of issues which will need to be addressed, if a successful water-based tourism development is to be delivered.



5.2 Canáil Eglinton / Eglinton Canal

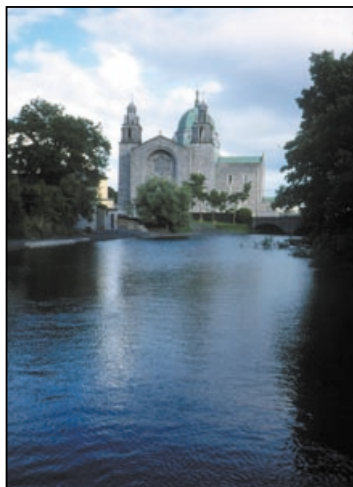
Cé nár sheol aon bhád ar Chanáil Eglinton ó 1955 baintear úsáid go háitiúil as le haghaidh iascaireachta agus siúlóidí. Meastar go bhfuil athchóiriú na gcanálacha ina dhlúthchuid d'obair athnuachana in aon chathair, agus bheadh sé seo ina cheantar tábhachtach turasóireachta istigh i gCathair na Gaillimhe.

D'fhéadfaí leathnú agus cóiriú a dhéanamh ar na cosáin atá ag rith leis an gcanáil, agus bheadh ceangal ag na cosáin coisithe agus rothaíochta le uiscebhealaí eile sa chathair, agus bealach trasna na Coiribe acu ar an seandroichead iarnróid. D'fhéadfaí cóiriú a dhéanamh ar ghnéithe eile freisin - an oidhreacht thionsclaíochta, iascaireacht, deisiú na loc, agus eile.



Overview

The Eglinton Canal is an important "green" corridor running from the Claddagh Basin to Earl's Island. It has not been navigable since 1955 but is a pleasant urban backwater, close to the city and used by locals for fishing and walking. Canal regeneration has been identified as a major contributor to urban renewal and regeneration. An opportunity exists to



develop a new tourism area within Galway city, which encompasses the Eglinton canal, through the creation of a heritage walkway, a cycleway and property redevelopment.

Development Potential

There is potential to expand and improve the existing waterside walks which include a pedestrian and cycle way on the east-side of the river. A pedestrian and cycle way should be designated, which would encompass the whole canal, with linkages to other waterways on Nun's Island, and crossing the River Corrib by the disused Railway Bridge.

Other development options are:

- Industrial heritage related tourism.
- To encourage amenity fishing and educational facilities for children.
- Appropriate property redevelopment which would assist in revitalisation of the canal corridor.
- Restoration of lock gates to improve maintenance and enable full navigation at some possible future date.

Cúinsí Pleanála / Planning Considerations

Tá polasaí forbartha do na huiscebhealaí, agus Canáil Eglinton san áireamh, ina chuid de Phlean Forbartha Chathair na Gaillimhe. Faoi seo dhéanfaí forbairt chuí ar uiscebhealaí na cathrach i dtaca le gnéithe stairiúla, trádála agus eile. Coinneofar go dlúth le carachtar stairiúil na n-uiscebhealaí sin. Cé nach bhfuil forbairt den sórt seo ar bharr an liosta go náisiúnta, fós bheadh sé inmholta go ndéanfaí é. Ba chóir tacaíocht agus cúnamh na n-údarás cuí a lorg don togra seo a chosnódh €3.5 milliún. Bheadh plean cuimsitheach forbartha ag teastáil chuige.

Galway City Development Plan 1999

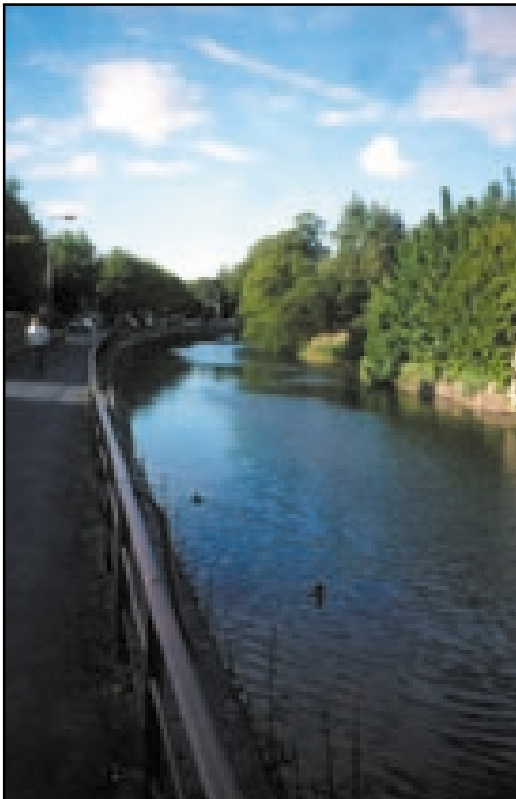
Recreation and Amenity

The Development Plan cites that the specific waterways in Galway city (including Eglinton Canal) give Galway a townscape with a special

environmental quality.

Applicable Policy:

- To develop the historical, commercial, amenity and other aspects of the city's waterways as appropriate.
- The City Council will conserve the distinctive character of this area by encouraging uses which will facilitate the retention of the buildings and waterways, and the maximum utilisation of their potential and tourist interest.
- The semi-rural character of the waterways will be protected.



National Waterways Strategy

The reopening of the waterway to navigation is seen as desirable, subject to feasibility considerations, but is not an immediate priority. No actions should be taken that might hinder this at some future date.

Market considerations

Galway has a developing city-break product and is a popular touring base. The development of the Eglinton Canal Corridor and the Millennium Bridge has significant market appeal. The rejuvenated product would enhance the city's appeal to all types of visitor, and provide an additional tourist attraction as well as enhanced amenities for the local community.

Stakeholders

Galway City Council is the key stakeholder. The Western Regional Fisheries Board can also play a role in the restocking of the canal. The input and advice of Waterways Ireland, and the Heritage Council, should be sought.



Outline Cost

An estimate of cost for such a project would be €3.5 million; the main elements being the Millennium footbridge across the former railway bridge, a small footbridge across the canal, new paths, restoration of lock gates and signage.

Indicative Funding Source

BMW Tourism Sub Measure – access infrastructure.
National Lottery – Millennium Fund.
Waterways Ireland.

Development Strategy and Methodology for Delivery

A detailed development plan is required to initiate the development of the Eglinton Canal Corridor. It is recommended that an action team be set up by Galway City Council in order to realise this project. The action team should oversee the project planning, delivery and marketing of the facility.

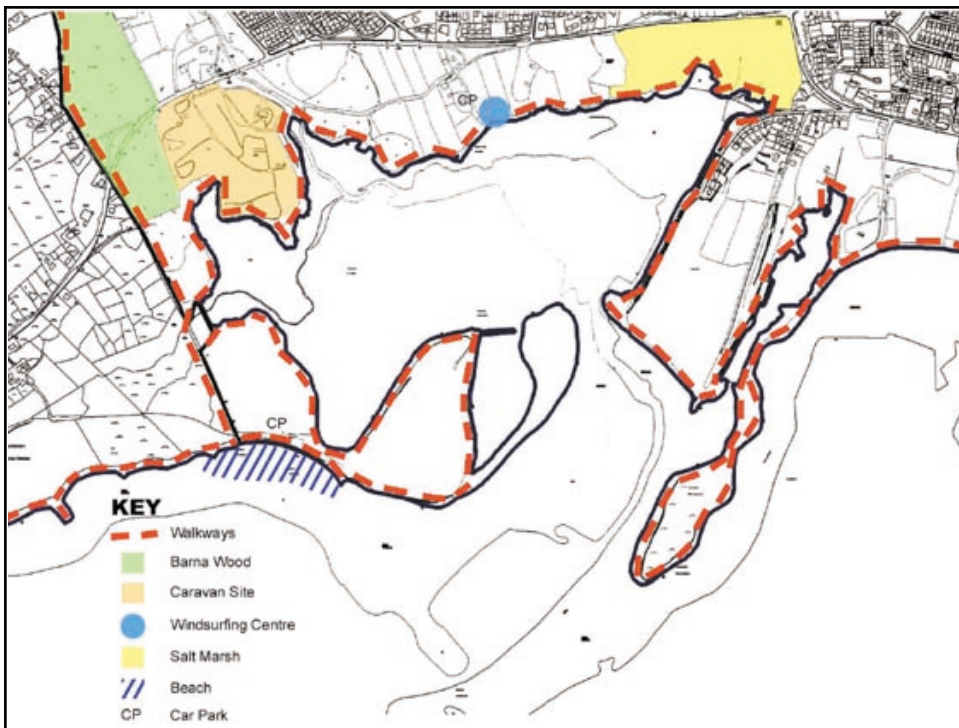
Suggested Lead Agency / Promoter:

Galway City Council.

5.3 Loch Roisín agus Coill Bhearna / Lough Rusheen & Barna Wood

Cuan álainn foscúil é seo, atá i gCathair na Gaillimhe, agus é oiriúnach le forbairt do raon leathan spóirt ar uisce. Tá roinnt áiseanna in aice láimhe cheana féin ach níl sé furasta dul chomh fada leis an gcuan féin. Tá riasc goirt sa gceantar a bheadh oiriúnach mar cheantar caomhnaithe dúlra, agus tá Coill Bhearna ó thuaidh dó.

Moltar an t-ionad gaothscimeála atá ansin cheana féin a fhorbairt ina ionad spóirt ar uisce. Chaithfí foirgintí, leithris, áit páirceála, srl., a thógáil, agus cosán coisithe go Coill Bhearna san áireamh. Bheadh cead planála ag teastáil agus cead le fáil chun forbairt a dhéanamh ar limistéar caomhnaithe. Meastar go gcosnódh an fhorbairt €1.2 milliún ina iomláine, bóithre áise agus cosáin san áireamh, ach tá roinnt foinsí luaite i dtaca le maoiniú a dhéanamh ar an obair.



Map of Lough Rusheen Showing Existing and Potential Uses

Lough Rusheen is an attractive, sheltered bay within Galway city and has the potential to be developed for a range of water and land-based activities. There is an existing windsurfing centre with limited facilities on the northern shore as well as a caravan park and car park to the rear of the beach at Silver Strand. However, access to the lough shore is restricted. An area of salt marsh is a potential nature reserve and Barna Wood to the north west of the Lough is zoned

for amenity use.

Development Potential

The proposal concerns the development of facilities at Lough Rusheen which would provide a range of activities such as windsurfing, dinghy sailing, kayaking and sail boarding. The infrastructural requirements would include a reception building, toilets, changing and shower facilities, a slipway and storage buildings with improved car parking and access. The area could also be opened up to walkers by constructing a shoreline path that links to Barna Wood. The habitat interest suggests opportunities and facilities for bird-watching.

Planning Considerations

Galway City Development Plan 1999

Lough Rusheen is cited in the City Development Plan as an 'Enclosed Wetland Semi-Natural Open Space'. It

is a designated Area of Scientific Interest (ecological). The majority of the land around the lough has been zoned as a candidate SAC. New facilities, or expansion of existing water-based activities would be a Notifiable Action. The applicable Notifiable Actions for these activities states that the Minister for Arts, Heritage, Gaeltacht and the Islands must grant written consent before development can go ahead. Land around the existing windsurfing centre, in the mid-section of the lough shore has been zoned for open space and amenity. Any new facilities in terms of buildings, car parks or slipways would require planning permission from Galway City Council.

Specific Recreation and Amenity Objectives:

- Develop lands at Rusheen for passive recreation and to preserve the existing bird sanctuary by the creation of sensitive amenity development of the land surrounding the area.



Views of Special Amenity:

- Views across Lough Rusheen from the Barna Road, from south of Knocknacarra Cross to City boundary, from the road running south to Silver Strand and from Blakes Hill.

Market considerations

The growing population of Galway and its ability to attract activity orientated visitors from the domestic and overseas markets are the key forces behind this project. The target markets are windsurfing clubs, those seeking tuition in water-sports and activity holidaymakers.

Stakeholders

The key stakeholders here are:

Private sector operators of existing / potential facilities

Local landowners

Galway City Council

Údarás Na Gaeltachta.



Outline Cost

An estimate of the cost for such a project would be €1.2 million; the main elements would be the construction of boardwalks and paths as part of the coastal path network, improved vehicular access from the R336, car parking, storage, user facilities and slipway.

Indicative Funding Sources

Sports Lottery Fund

BMW Tourism Sub Programme – Marine Tourism

Galway City Council

Western Investment Fund

Údarás Na Gaeltachta

Development Strategy & Methodology for Delivery.

Galway City Council should play a lead role in the development of this proposal, in consultation with existing operators and landowners.

Suggested Lead Agency/Promoter:

Public/Private Partnership

5.4 Iascaigh Chois Fharrage / South Connemara Fisheries

Forbhreathnú / Overview

Moltar leis an bplean seo go ndéanfaí athbhunú ar chuid de na hionaid iascaireachta i ndeisceart Chonamara, trí áiseanna cuí a chur ar fáil chun turasóirí a mhealladh chuig an gceantar.

Bheadh raon gníomhaíochtaí i gceist leis seo, an iascaireacht slaite ar an bpríomhcheann acu, ach san áireamh freisin bheadh siúlóidí, foghláireacht, treodóireacht, fánaíocht ar phónaí, rothaíocht sléibhe, saoirí chun strus a laghdú, cúrsaí éiceolaíochta, agus turais éiceolaíochta. D'fhéadfaí iascaireacht farraige agus turais éiceolaíochta ar bháid a eagrú as Ros a Mhíl, atá in aice láimhe. Bheadh deis ann freisin tograí a eagrú, i gcomhpháirtíocht le áisíneachtaí stáit, chun traenáil a thabhairt do shaoistí tuaithe, agus eile.

This proposal concerns the revival of some South Connemara fisheries, by providing a broad range of angling and sporting activities to attract angling tourists and special interest tourist groups into the area for long and short stay holidays.

The objective of this proposal is to provide a range of activities, the main activity being angling but broadened to include walking, shooting, orienteering, canoeing, pony trekking, off-road cycling, stress relief holidays, ecology courses and eco-tours. The proximity of Rossaveel offers the opportunity to provide sea angling and eco-tours by boat. There is scope also for joint ventures with state agencies to provide training for countryside rangers, courses in fly fishing and countryside appreciation.



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Acmhainneacht Forbartha / Development Potential

Bheadh lárionad gníomhaíochta agus lóistín ina chuid bunaidh den scéim,. San ionad sin bheadh na hoifigí, seomra fuaraithe, seomra fearas iascaireachta, seomra triomaithe agus áiseanna eile a chuirfeadh fad leis an séasúr. Dhéanfaí comhoibriú le tithe lóistín na háite agus leis na hóstáin bheaga chun lóistín a chur ar fáil do na cuairteoirí.

Thabharfaí aird ar leith do chúrsaí timpeallachta trína chinntiú go ndéanfaí bainistíocht cheart ar na feirmeacha éisc a bheadh in aice láimhe, rud a chinnteodh go mairfeadh an togra go folláin seasmhach.

Central to this concept is the provision of a base to provide a hub for activities. This would include offices, cool-room, tackle room and drying room, and would also accommodate a range of activities which would extend the holiday season. Co-operative arrangements with B&Bs and small hotels in the area would provide accommodation for intended clients.

Environmental issues, such as the management of fish farms near fish runs, would need to be addressed to ensure that this development can be sustainable.

Cúinsí Pleanála / Planning Considerations

Go ginearálta ceadáíonn Plean Forbartha Chontae na Gaillimhe 1997-2000 forbairt a dhéanamh ar thurasóireacht ar uisce, cé go bhfuil aird ar leith dírithe ar an gceantar locha agus criathraigh atá ó thuaidh den R336. Ní mór cead a fháil i scríbhinn ón Aire Ealaíon, Oidhreacht, Gaeltachta agus Oileán, sula dtosaítear ar aon fhorbairt. Os rud é gur ceantar Gaeltachta atá anseo freisin, ní mór d'aon fhoirgneamh nua a bheith ag dul le traidisiún na háite.

Tá Deisceart Conamara ar fad ainmnithe ina cheantar caomhnaithe ó thaobh áilleachta de, cé go bhfuil na locha agus na criathraigh rangaithe mar thalamh neamhfhorbartha sa Plean Forbartha. Níl cead forbairt a dhéanamh ar áiseanna trádála ná pobail sa gceantar sin mura bhfuil sé riachtanach d'fhorbairt an cheantair ina iomláine. Taobh istigh den limistéar neamhfhorbartha ní bheadh glacadh le haon fhoirgneamh ná le haon úsáid mura mbeadh baint dhíreach acu le úsáid atá ann cheana féin. Bheadh gá

le cead pleanála d'aon fhorbairt nua nó d'aon fhorbairt a bheadh le déanamh ar úsáid atá ann cheana féin, agus bheadh sé sin faoi réir na gcoinníollacha thuasluaite.

The Galway County Development Plan 1997-2000 generally allows for the expansion of water-based activities, although in the lakes and upland areas to the north of the R336, this is a notifiable action where the area falls within the proposed candidate Special Area of Conservation designation. The applicable Notifiable Actions for these activities state that the Minister for Arts, Heritage, Gaeltacht and the Islands must grant written consent before development can go ahead. The area is also within the Gaeltacht where buildings must be sympathetic to the vernacular style and form.

All of South Connemara is designated as an Area of High Scenic Amenity, although the lakes and uplands are designated as underdeveloped in the Development Plan. Development of commercial or community facilities here would only be acceptable if it was essential to the overall socio-economic development of the area. Within the underdeveloped area, only buildings or uses directly related to an existing use would be acceptable. Any new development or extension to an existing use would require planning permission subject to the above criteria being satisfied.

Cúinsí Margaíochta / Market Considerations

Léiríonn taighde margaíochta go mbíonn sé deacair ag custaiméirí a theacht ar áiseanna gníomhaíochta. Chuideodh an fhorbairt atá molta leis an scéal sin a leigheas trí imeachtaí eagraithe a thairiscint ó lárionaid amháin.

Research suggests that there is a niche market for angling holidays undertaken as part of a family holiday centred on non-angling activities (Overseas Angling Tourism – An Overview of the Potential Market from Britain, France and Germany, Marine Institute 2000). In order to compete in this market, it is necessary to provide holiday products which satisfy the anglers' needs and also provides activities of interest to other members of the family.

Coimeádaithe / Stakeholders

The key stakeholders include

The owners of the Connemara fisheries
Western Regional Fisheries Board
Údarás na Gaeltachta
Local Community Groups
Tourism product providers

Costas Imlíneach / Outline Cost

Bheadh costas measta de €2.3 milliún ar thogra den chineál sin. Ar na príomhghnéithe, bheadh an obair thógála ar an lárionaid, ar na hoifigí, agus ar na háiseanna oiliúna chun láthair a chur ar fáil d'imeachtaí éagsúla.

An estimate of cost for such a project would be €2.3 million; the main elements being the construction of a central base and development of offices and training facilities to provide a location for multiple activities.

Foinsí Maoinithe / Indicative Funding Sources

BMW Tourism Sub Measure
- marine and water based tourism.
- tourism/recreational angling.
BMW Gaeltacht/ islands measure
Western Investment Fund
Údarás na Gaeltachta

Straitéis Forbartha & Cur i bhfeidhm / Development Strategy & Methodology for Delivery

Beadh gá le staidéar féidireachta agus le plean gnó chun dul ar aghaidh leis an moladh seo. Theastódh taighde cruinn margaíochta chun a fháil amach cén líon turasóirí a mheallfadh sé agus cé na foinsí ioncaim eile a bheadh ar fáil dá thoradh. Ceist náisiúnta is ea cosaint agus athshlánú a dhéanamh ar na hionaid iascaireachta bradán, agus tá sé sin fíorthábhachtach i gcás Dheisceart Chonamara.

A feasibility study and business plan will be required to progress this development proposal. Focused market research will be needed to quantify likely occupancy and other income sources. The protection and rehabilitation of salmon fisheries is a national issue requiring attention, and is a central consideration in the case of South Connemara.

Suggested Lead Agency/Promoter:

Public / Private Partnership

5.5 Ceantar na nOileán.

Forbhreathnú / Overview

Ceantar ar leith a bhfuil fíor-áilleacht nádúrtha ann is ea Ceantar na nOileán ar chósta Chonamara. Sraith oileán atá sa gceantar a bhfuil ceangail bóthair idir iad féin agus an mhórthír. D'fhéadfaí ionad forbartha turasóireachta mara a lonnú anseo. I measc na nithe a d'fhéadfaí a fhorbairt faoi dhíon ann tá áiseanna leighis, fóillíochta, teiripe sáile, chomh maith leis an iascaireacht, gníomhaíochtaí lasmuigh, agus áiseanna bádóireachta. Chiallódh sin go mbeadh raon éagsúil imeachtaí ar siúl sa gceantar a mhealladh cuairteoirí chuig an gceantar le fanacht thar oíche. Bhunófaí an fhorbairt ar na háiseanna agus ar an traidisiún mara atá sa gceantar cheana féin.

Ceantar na nOileán is a unique area of natural beauty on the Connemara Coast and is made up of a cluster of islands connected to the mainland by road. This area has been chosen for a major inter-departmental Government initiative aimed at enhancing the area's attractiveness as a location for investment in marine leisure activities, including access infrastructure and health related therapies. A primary objective is that developments will be supported by high quality accommodation, culinary activities based on local quality food, and entertainment based on the rich traditional music scene in the area.

Acmhainneacht Forbartha / Development Potential

D'fhéadfaí áis thurasóireachta mara agus cósta a bhunú agus a fhorbairt sa gceantar trí úsáid a bhaint as togha na dtithe lóistín, agus as na háiseanna bia atá ar fáil ann. D'fhéadfadh ionad sláinte, fóillíochta agus teiripe sáile a bheith ina chuid d'fhorbairt óstáin sa réigiún. Ba chóir an fhorbairt a bheith ina lárionad den scoth don cheol traidisiúnta agus don Ghaeilge, agus é sin a bheith ina chuid den bhonneagar a ndéanfaí forbairt air i dtaca le imeachtaí lasmuigh agus le turasóireacht ar uisce. Dá gcuirfí isteach droichead inoscailte in áit an droichid bhuaibh bheadh fáil arís ar an mbealach taistil a bhíodh ag Húicéirí na Gaillimhe tráth, agus mheallfaí báid fóillíochta chuig an gceantar dá thoradh. Tá costas measta de €15 milliún á thuar don togra seo.

Potential exists to create a cluster of sustainable marine and coastal-based tourism products based on the natural resources, and offering quality family accommodation and good cuisine, using local

produce. An hotel development incorporating health, leisure and thalassotherapy treatments and providing a centre for traditional music, cultural activities and events could be a focal element of the development cluster. The replacement of the existing fixed land bridge with an opening bridge would restore the original route taken by the Galway Hookers which traded in the area and facilitate access for leisure boating activity.

Cúinsí Pleanála / Planning Considerations

Go ginearálta ceadáíonn Plean Forbartha Chontae na Gaillimhe 1997-2000 forbairt a dhéanamh ar thurasóireacht ar uisce, cé go bhfuil gá



le ceadúcháin ar leith i gcásanna áirithe. Ní mór cead a fháil i scríbhinn ón Aire Ealaíon, Oidhreacht, Gaeltachta agus Oileán, sula dtosaítear ar aon fhorbairt. Tá oileán Eanach Mheáin ina iomláine aitheanta mar cheantar caomhnaithe agus bheadh an cás thuas i gceist le haon fhorbairt nua ann. Tá an t-oileán istigh sa nGaeltacht freisin agus ní mór aon fhoirgneamh nua i gceantar Gaeltachta a bheith ag dul le stíl agus le traidisiún an cheantair.

Léiríonn an Plean Forbartha gur ceantar áilleachta an limistéar atá thart ar an ngalfchúrsa agus dá réir bheadh cead pleanála ag teastáil d'aon fhorbairt a dhéanfaí ar áiseanna tráchtála nó pobail, agus ní cheadófar an fhorbairt mura mbeidh sé ina chuid riachtanach d'fhorbairt sóisialta agus eacnamaíochta an cheantair ina iomláine. Níl an talamh gar do dhroichead Bhéal an Daingean caomhnaithe agus mar sin tagann sé faoi pholasaí pleanála tuaithe na Comhairle. Faoina réir sin glactar le forbairt thurasóireachta ar chuntar go dtagann sé leis an tírdhreach.

The Galway County Development Plan 1997-2000 generally allows for the expansion of water-based activities, although in many areas this is a notifiable action. The applicable Notifiable Actions for these activities state that the Minister for Arts, Heritage, Gaeltacht and the Islands must grant written consent before development can go ahead. The entire island of Eanach Mheáin is designated as a proposed candidate Special Area of Conservation and so the



above would apply for any new development. The island is also within the Gaeltacht and new buildings in Gaeltacht areas must be sympathetic to the vernacular style and form.

The area around the golf course and self-catering houses is designated as an Area of High Scenic Amenity in the Development Plan. Development of commercial or community facilities here would require planning permission, and would only be acceptable if it was essential to the socio-economic development of the area. The land adjacent to Béal an Daingean is not designated for special protection in the County Plan and as such is covered by the Council's rural planning policy. This states that tourism development will be acceptable, provided that it can be assimilated into the landscape.

Cúinsí Margaíochta / Market Considerations

Tá easpa ionaid mhóra tharraingteacha i nGaillimh go ginearálta, agus i gConamara go speisialta, agus cé is moite de Kylemore Abbey agus de Pháirc Náisiúnta Chonamara is beag áit eile a mheallfadh daoine le stopadh ann ar a dturas thart ar Chonamara. Léiríonn an staidéar seo go bhfuil deis iontach margaíochta ar fáil má nasctar cúrsaí cultúrtha le gníomhaíochtaí ar uisce. Léirigh staidéir a rinneadh roimhe seo, d'Údarás na Gaeltachta, go mbeadh deis ionad mara a bhunú sa gceantar. Ní mór go mbeadh an fhorbairt seo in ann brath ar an margadh áitiúil, atá ag treisiú go leanúnach i gCathair na Gaillimhe, chomh maith le turasóirí ón taobh amuigh, más faoi a bheith buan. Beidh an mhargaíocht an-tábhachtach agus caithfear é a maoiniú dá réir. Caithfear straitéis chuimsitheach mhargaíochta a chur le chéile chun ionad nua turasóireachta a dhéanamh de Cheantar na nOileán i nGaeltacht na Gaillimhe.

Galway generally and the Gaeltacht in particular lack attractions of scale; apart from Kylemore Abbey and the Connemara National Park, there are few "stopping off" places on a Connemara tour. The linking of culture and water-based activity is identified as a clear market opportunity in this study. Previous studies for

Údarás Na Gaeltachta have indicated an opportunity for a maritime based centre. Tourism development in Ceantar na nOileain will need to rely both on the growing domestic market and overseas visitors to succeed. Marketing will be a key consideration and must be well funded. A carefully thought out marketing strategy will be required to establish Ceantar na nOileán as a new tourism destination in the Galway Gaeltacht.

Coimeádaithe / Stakeholders

This proposal will require strong private sector input and The Minister for the Marine and Natural Resources recently (November 2001) established a Task Force to examine the potential of this area, and bring together potential stakeholders.

Costas Imlíneach / Outline Cost

An estimate of cost for such a project would be €15 million; the main elements being a quality small scale hotel, marine infrastructure, bridge works and road realignment.

Foinsí Maoinithe / Indicative Funding Sources

BMW Gaeltacht / Islands Measure

Western Investment Fund

Údarás Na Gaeltachta

BMW Tourism Sub Measure

- development of major attractions
- special interest pursuits
- marine tourism

Development Strategy & Methodology for Delivery.

Údarás Na Gaeltachta, the Minister's Task Force and the private sector will have a key role to play in delivering this project. In order for the project to succeed it may be necessary to target blue-chip accommodation operators; a tax incentive package may be required to fund development options; and Galway County Council will have a role to play in relation to the realignment of roads. A comprehensive development plan would be required.

Straitéis Forbartha & Cur i bhfeidhm/ Suggested Lead Agency/ Promoter:

Minister for the Marine and Natural Resources Task Force

5.6 An Caoláire Rua / National Maritime Watersports Facility, Killary

Tá bailiúchán suntasach de ghnóthaí turasóireachta ar uisce bunaithe sa gceantar seo cheana féin agus ba chóir tuilleadh forbartha a dhéanamh orthu trí Ionad Náisiúnta Spóirt Uisce a chruthú ann. Chomh maith leis an mbunchloch gnó atá ann cheana féin tá áiseanna lóistín ar fáil freisin, agus d'fhéadfaí iad siúd a fhorbairt chomh maith. Moltar an fhorbairt a dhéanamh ar mhúnla an Welsh National Watersports Centre ag Plas Menai.

Faoi Phlean Forbartha Chontae na Gaillimhe tá an cladach ó dheas den Chaoláire Rua ina limistéar caomhnaithe, agus mar sin chaithfí cead an Aire Ealaíon, Oidhreachta, Gaeltachta agus Oileán a fháil d'aon fhorbairt a bheadh beartaithe san áit. Níl sin fíor i gcás an Líonaín ná faoin gceantar atá thart ar an



Killary Adventure Centre, agus bheadh níos mó glacadh le forbairt ansin cé go mbeadh cead pleanála agus eile i gceist.

Moltar go mbeadh áisíneachtaí náisiúnta páirteach i bhforbairt an cheantair seo, in éineacht leis an earnáil phríobháideach. Ní mór staidéar féidireachta a dhéanamh ar an scéal, i dtaca le margaíocht, riachtanais agus caipiteal. Caithfidh Comhairlí Contae Mhaigh Eo agus na Gaillimhe socrú a dhéanamh eatarthu faoi mhaoirsiú an chuain ina iomláine.

Meastar gur costas €1.5 – 2 mhilliún a bheadh ar an togra seo agus tá roinnt eagraíochtaí a bhféadfaí maoiniú a lorg orthu don obair.

Overview

A cluster of established water-based activities are currently provided in Killary Harbour. There is potential to capitalise on this activity base by designating Killary Harbour as a national maritime watersports centre. Extensive upgrading and enhancement of facilities, together with an integrated

development and marketing plan, incorporating the network of operators and activity providers, would be required to achieve this status. Killary Harbour would act as a national watersports centre for providing first class training and accreditation in all water-based activities both at instructor and participant level. A range of residential courses suitable for water-based recreational and sporting activities would be offered, utilising the existing accommodation base. A model for this development proposal could be the Welsh National Watersports Centre at Plas Menai.

Development Potential

Building on the foundations of the established pool of operators and with improved infrastructure and facilities, Killary Harbour could meet the demand for a wide range of water-based recreational and sporting activities. A good accommodation base exists, which

can be built upon as demand increases. Thus the designation of Killary Harbour as a national watersports centre would meet a clear market need and would also provide facilities for activity holidaymakers, who already visit Killary.

Planning Considerations

According to the Galway County Development Plan 1997-2000 the southern shore of Killary Fjord is both a proposed Natural Heritage Area (NHA) and an Area of Outstanding Scenic Amenity (AOSA). In terms of the NHA designation, expansion or new water based activities are Notifiable Actions. The applicable Notifiable Action for these activities state that the Minister for Arts, Heritage, Gaeltacht and the Islands must grant written consent before development can go ahead. The AOSA designation permits new commercial and community development that is directly related to an existing use. Leenaun and the area around the existing Killary Adventure Centre are excluded from the Natural Heritage Area designation and would therefore be locations where the development of water-based activities would be more acceptable. Any new development including buildings, slipways and jetties would require planning permission from the County Council. Foreshore licences may also be required.



Market Considerations

Killary is developing a niche product identity as a marine watersports venue.

Sectors which could be attracted are:

- Existing activity holiday market;
- Educational groups;
- Teachers/instructors;
- Families and leisure visitors;
- Corporate groups.

Activity centres are consistently 'trading up' as expectations from the market place rise, and a wealthier, more discerning activity holiday maker emerges in North America and Europe. Ireland needs to upgrade its facilities if the country's natural assets are to be exploited effectively for activity tourism.

Stakeholders

In order to achieve this proposed 'national' status, it is recommended that, in addition to existing private sector operators, national bodies should be involved. These would include: the Sports Council - with overall responsibility for sports development; Department of the Marine and Natural Resources - with responsibility for activity centres; CERT - with responsibility for training in tourism; and relevant National Sporting Bodies. Both Galway and Mayo County Councils would also have important roles to play.

Development Strategy and Methodology for Delivery

A strong private sector interest exists in this proposal,

however public sector investment and participation will be required in order to give the designation a true 'national' tag. A full feasibility study, to examine market potential, infrastructure needs, and capital and running costs is the next step. Agreement is also needed on the corporate structure required to take the concept forward. The wider spatial plan for designating Killary Harbour as the premier Irish water-based activity destination will need to be agreed between Galway and Mayo County Councils.

Outline Cost

An estimate of the cost for such a facility would be €1.5 – 2 million; the main elements would be access, slipways, storage and equipment.

Indicative Funding Sources

If a suitable corporate structure can be put in place, ideally with a public sector lead to access higher levels of grant aid, the following funding sources should be targeted:-

National Lottery – Sports Capital Programme:

BMW Tourism Sub Measure - special interest pursuits
- marine tourism:

Western Investment Fund;

Sports – Regional Operation Programme.

Suggested Lead Agency/ Promoter: Private/ Public Partnership

5.7 Abhainn an Chláir / River Clare

Seo togra chun feabhas a chur ar na háiseanna iascaireachta slaite ar Abhainn an Chláir. Tá an abhainn seo ag sníomh trí Ghaeltacht Achréidh na Gaillimhe. Moltar réimse 2.5 míle den abhainn in aice le loch Coirib a fhorbairt mar ionad do chomórtais Náisiúnta agus Idirnáisiúnta iascaireachta.

Moltar forbairt a dhéanamh ar na bealaí áise isteach chuig Abhainn an Chláir, in aice le Tuaim, ar mhaithe leis an iascaireacht bradán agus breac, spórt a mheallann a lán turasóirí chuig an áit gach bliain. Bheadh gá le cead pleanála d'aon áiseanna nua a thógfaí.

Tá suim mhór i gcomórtais iascaireachta sa mBreatain agus ar fud na hEorpa, agus suim ar leith in iascaireacht abhann. Freisin tá dhá chumann iascaireachta i dTuaim a d'fhéadfadh a bheith páirteach sa togra seo.

Meastar gur costas €250,000 a bheadh ar an bhforbairt atá beartaithe don iascaireacht gharbh agus €100,000 ar an bhforbairt don iascaireacht ghéime. Níor mhór do Bhord Iascaireachta Réigiúin an iarthair a bheith páirteach sa scéim chun na gnéithe éagsúla a chomhordú.

Overview

This two-fold project involves enhancing facilities for game and coarse anglers on the River Clare, which flows near Tuam and south to Lough Corrib. Improving access to waters and the management of the fishery in a user-friendly, tourist orientated way would be central to this development concept. There are two angling clubs in Tuam; both would be involved in any new projects that would improve facilities for visiting anglers to the area.

Development Potential

(i) Coarse Angling

It is proposed to create a new angling stretch of river, covering 2.5 miles of the River Clare from near Lough Corrib to over 1 mile upstream of the main road bridge on the Galway-Headford. This stretch of river will provide a venue for national and international competitions, and will be one of the longest competition reaches in Ireland.

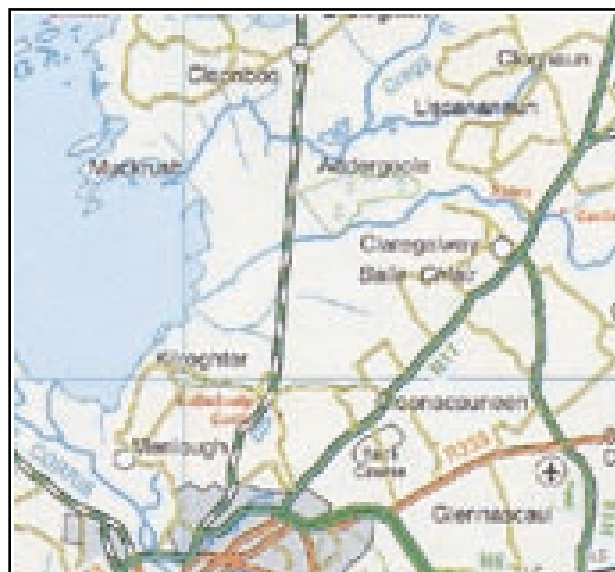
A small road runs for approximately 1 mile parallel to the river and, to further enhance the entire project, it is proposed that Galway County Council should improve access points along this road.

(ii) Game Angling

The project involves the improvement of access facilities for salmon and trout angling on the River Clare near Tuam, an area that is attracting more angling tourists every year.

Planning Considerations

Any new facility such as small buildings or fishing stands would require planning permission. The land either side of the River Clare is in open countryside in the Galway County Plan 1997-2002. It is not covered by any designations, and as such any new water-based development relating to fishing would be given favourable consideration providing it could be assimilated with the landscape.



Map Showing River Clare East of Lough Corrib

By Kind Permission of Ordnance Survey

Market Considerations

Although the British market for coarse angling in Ireland is relatively static, there is strong interest in new match angling venues. The demand for river angling, particularly from the European market is growing, and there is increasing interest in wild brown trout.

Stakeholders

The key stakeholders are:

- Riparian owners
- Western Regional Fisheries Board
- Local landowners
- Local angling clubs

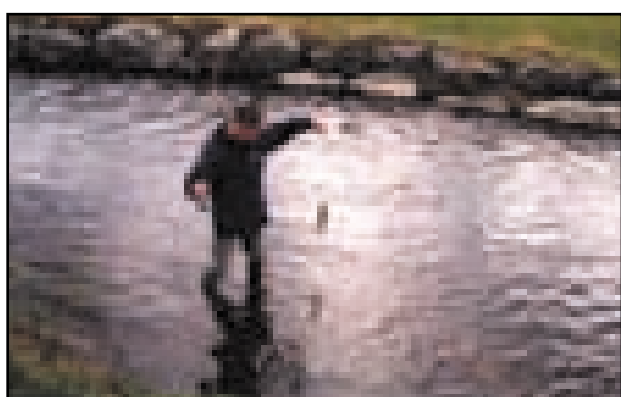
Outline Cost

(I) Coarse Angling Project

An estimate of cost for this project would be €250K for improved access including 3 car parking areas, 1 coach parking area, stiles, footbridge and pathways.

(II) Game Angling Project

An estimate of cost for this project would be €100K for improved access including 2 parking areas, stiles, and footbridges across tributaries and pathways.



Indicative Funding Source

BMW Tourism Sub Measure – Tourism/Recreational Angling

Development Strategy and Methodology for Delivery

The Western Regional Fisheries Board would need to lead this project. An agreed development strategy with the relevant stakeholders would be necessary as a first step in these development proposals. This common approach should be geared towards meeting the needs of angling tour operators and visiting overseas anglers and must regulate sales of 'beats' on the water, and ensure that these are not encroached on by other anglers.

Suggested Lead Agency/Promoter: Western Regional Fisheries Board.

5.8 Béal Átha na Sluaighe / Ballinasloe

I mBéal Átha na Sluaighe agus i mBéal Átha Ghártha atá an dá phríomhionad iascaireachta ar abhainn an tSuca, abhainn a bhfuil an-cháil uirthi agus deis iascaireachta uirthi i rith na bliana ar fad. Tá bealach siúil 100 km, an Suck Valley Way, sa gceantar chun



deis a thabhairt do dhaoine sult a bhaint as stair agus as fiadhúlra an cheantair.

D'fhéadfaí forbairt a dhéanamh ar acmhainn iascaireachta an tSuca agus a cuid fo-aibhneacha, áiseanna a chur ar fáil, limistéir do chomórtais, droichid, cothabháil, rochtana, cosáin coisithe agus foirniú.

Overview

The proposal for Ballinasloe concerns the existing popular activities of fishing and walking. Ballinasloe and Ballygar are the two main angling centres on the River Suck, which is renowned for its pike, bream, and perch fishing in the main river, and trout in its tributaries. The river can be fished all year round for pike, perch and bream. There are three main tributaries that flow into the River Suck on the Galway side: the Bunowen, Ballyharda and Shevin Rivers. These are game fisheries and are fished mainly in the summer and many of the sections are suitable for wild brown trout fishing. To provide a sustainable angling product there is a need to undertake a major in-stream improvements programme.

Walkers can enjoy the countryside by walking the 100km Suck Valley Way, which passes through the 'Nine Friendly Villages' of the Suck Valley region. The

former route of the Grand Canal is popular for walking, part of which is owned by Ballinasloe Town Council who have reserved it for amenity purposes. A possible loop walk from the marina to connect with the canal footpath would provide access along the river for fishing stands.

Development Potential

The full potential of the angling resources of the River Suck has not been reached due to lack of facilities and poor access. Investment in new facilities, improved access and on-going maintenance of the river and tributaries will help to attract more long-stay visitors participating in fishing competitions and ensure a sustainable tourism angling product. A loop walkway along the route of the canal and riverbank would link the marina with angling activity and walkers, thereby providing an attractive recreational and tourism amenity in the area.

Planning Considerations

Galway County Development Plan 1997-2002

According to the Galway County Development Plan 1997 – 2002 the River Suck Valley is a proposed Natural Heritage Area.

An area to the south west of the town has been designated as an Area of Recreational Amenity and is therefore protected for its amenity value, specifically for its coarse and game fishing value.

Ballinasloe Draft Development Plan 2001

The Ballinasloe Draft Development Plan 2001 has recently been approved by the Town Council to go on public display. The policies and objectives relevant to water-based tourism are as follows:

The banks on either side of the River Suck are designated for their natural and environmental amenity importance. It is a primary objective of the Draft Plan to protect key landscape elements ensuring that Ballinasloe retains its character. It recognises that the River Suck is attractive for tourism and recreation and therefore aims to promote the river for activities such as canoeing, cruising and fishing.

The Draft Plan has also highlighted the importance of amenity walkways especially in connection with river

uses. The feasibility of providing a tourism trail along the disused canal and River Suck is to be explored. The path of the former canal is protected and is regarded as being of national importance and is a site of archaeological importance.

Market Considerations

There is increasing interest in new match angling venues of an international standard. The tourism angling market for wild brown trout is growing and there is a demand for more river angling. Leisure walking, particularly close to urban centres, is increasing in popularity.



Stakeholders

Shannon Regional Fisheries Board
Ballinasloe and District Anglers Club
Ballinasloe Town Council
Galway County Council

Outline Costs

- Stream enhancement and access including parking areas, stiles, footbridges, walkways and road improvements for the game fisheries. An estimated cost for this project would be €3 million.
- An estimate of the cost for the three international match stretches on the River Suck for coarse fishing would be €630K, and would include:
 - Access improvements along country lanes ;
 - Car parks close to the river (3 car parks in prime locations along the river and 10 small ones for 2-3 cars);
 - Fishing pegs (50);

- Loop walkway, to include path connections, interpretative boards and stiles is estimated to cost €500K.

Indicative Funding Source

BMW Tourism Sub Measure – Tourism/ Recreational Angling

Development Strategy and Method for Delivery

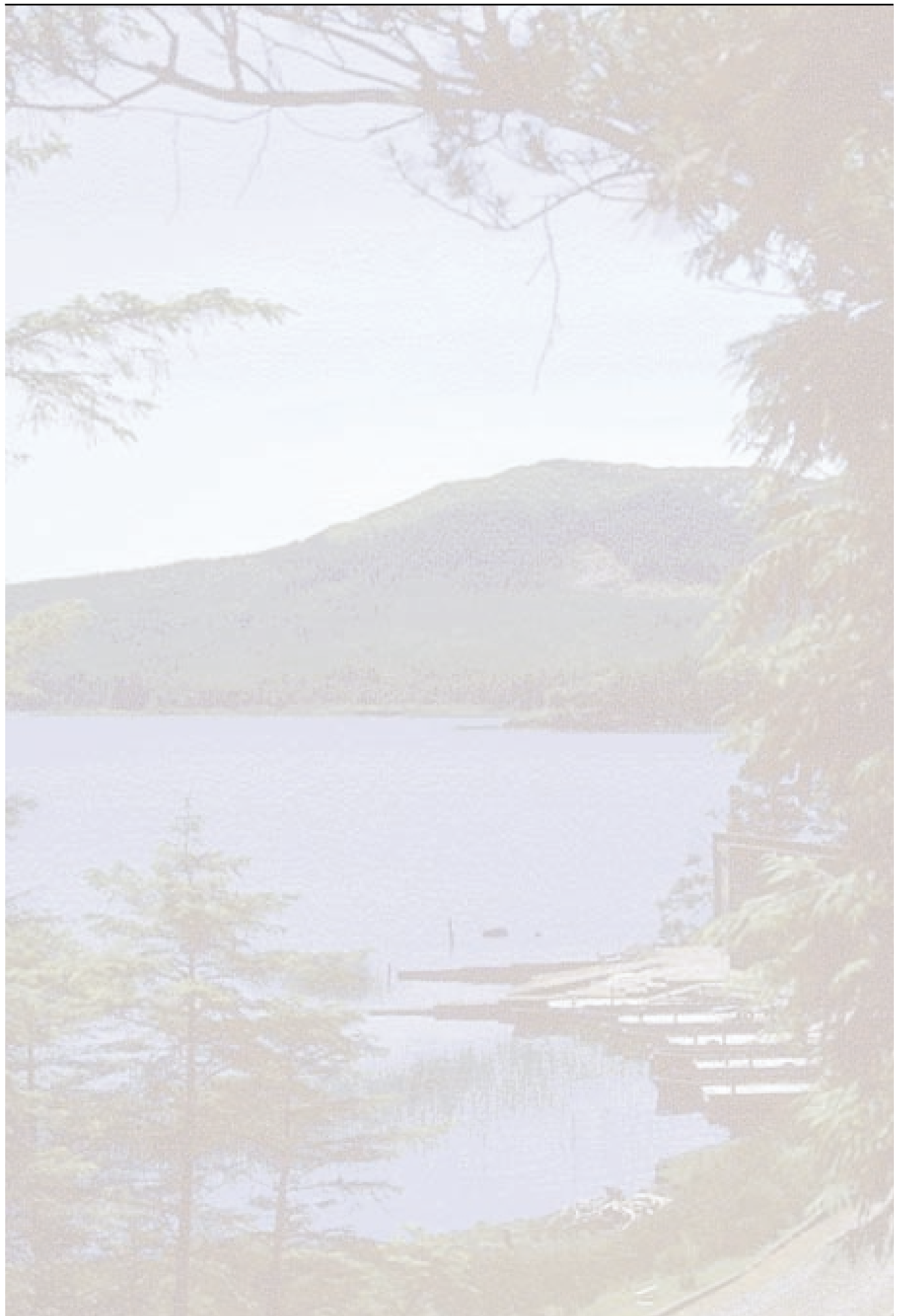
In order to advance fishing and walking in the Ballinasloe area, detailed proposals need to be planned and the goodwill of the local landowners secured. It is suggested that consideration be given to employing a permanent person dedicated to maintaining the rivers to a high standard.

Investment is required in the following:

- Three international match stretches on the River Suck (coarse fishing): at Correen (south of Ballinasloe), at Dalys Grove and Ballyforan Bridge (north of Ballinasloe);
- Stream enhancement in Shiven and Bunowen catchments;
- Stiles and bridges on the main coarse and game fisheries;
- Partnership between the Shannon Regional Fisheries Board and Galway County Council to improve road access to the rivers;
- Appropriate staffing for ongoing maintenance of tributaries;
- Management of salmon stock at River Suck Fishery near Ballinasloe;
- A loop walkway of approximately 3.5 km from the marina along the route of the old canal and returning to the marina via the river bank, including the provision of interpretative boards. This will link the use of the marina with walking and fishing.

Suggested Lead Agency/Promoter:

Galway County Council and Ballinasloe Town Council. Shannon Regional Fisheries Form would have an important role to play.



6.0 NA PRÍOMHPHOINTÍ / CONCLUSIONS

Tá 40 moladh sa staidéar seo chun déileáil leis na laigí atá i gcúrsaí turasóireachta ar uisce i gcathair agus i gContae na Gaillimhe faoi láthair. Bheadh buntáistí suntasacha eacnamaíochta agus eile le fáil dá gcuirfí na moltaí sin i bhfeidhm. Ar na buntáistí sin bheadh:

- breis turasóirí agus breis ioncaim ón turasóireacht
- cuairteoirí ag fanacht níos faide sa gceantar
- na cuairteoirí sin níos sásta
- an gnó roinnte amach níos fearr ar an réigiún
- breis roghanna caithimh aimsire ag cuairteoirí agus ag muintir na háite
- feabhas ar chúinsí timpeallachta
- cáil níos fearr ar an réigiún
- breis comhoibrithe agus forbartha i dtionscail na turasóireachta.

This study outlines over 40 recommendations which address current weaknesses in Galway City and County's water-based tourism product, and builds on market opportunities. The economic spin-off which will result from adopting the strategic approach outlined in this report will be considerable. These benefits will include:

- additional tourist numbers and revenue;
- increased length of stay by visitors;
- increased visitor satisfaction levels;
- enhanced regional spread;
- enhanced leisure options for visitors and local residents;
- improved environmental conditions;
- enhanced destination reputation and profile;
- increased co-operation and synergy within the tourism industry.

The National Development Plan and other funding mechanisms present a real opportunity for Galway City and County to build upon its natural product strengths. It is essential that well researched and strategically driven proposals are brought forward to feasibility study and business plan stage, so that the uptake of development and support funds can be maximised. These proposals must be market-led and fully in accordance with sound environmental and

planning policies. The Agencies and partners who commissioned this study and have overseen the study process are committed to supporting the tourism industry in Galway City and County in its quest for future growth and sustainable water-based tourism development.

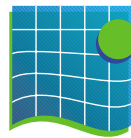


Appendix I - Consultations and Submissions

Aer Arann Holidays	Kilkullens Seaweed Baths
APF Mc Carthy, Planning Consultants	Lough Inagh Lodge
Ardilaun Hotel	Mac Con Iomaire, Thomás
Ballinasloe & District Anglers Club	Marine Institute
Ballinasloe Town Council	Mayo County Council
Ballynahinch Castle	National Roads Authority
Bord Fáilte	National Salmon Commission
Byrne Hotel Group	North Atlantic Salmon Fund
Celtic Seaweed Baths	NUI – Galway
Central Fisheries Board	Pleasure Cruisers
Combar Caomhan Teo	Rinville Marina
Combarchumann Combarchumann Inis Meain	Salthill Park Ltd
Comharchumann Forbatha Inis Mor	Scubadive West
Connemara Walking Centre	Shannon Oaks Hotel
Corrib Cruises	Shannon Regional Fisheries Board
Corrib Country Holidays	South East Galway Community Development Project
Corrib Navigation Authority	Still Waters Consultancy
Corrib Princess	Sweeney Hotels
Curran, Brian	Tuam, Clare and Corrib Anglers Association
D’Arcy Marketing	Údarás Na Gaeltachta
De Buitléar, Cian	Up River Kayaking & Canoeing Centre
Delphi Adventure Centre & Spa	Waterways Ireland
Department of Arts Heritage Gaeltacht and the Islands	Western Development Commission
Department of the Marine and National Resources	Western Regional Fisheries Board
Dive Ireland	Western Regional Tourism Authority
Dolan-Doy, Jackie	Zetland Country House Hotel
Dúchas - The Heritage Service	
Environmental Protection Agency	
Experience Ireland Holidays	
Gaelsoire	
Galway Atlantaquarium	
Galway Bay Hotel	
Galway City Council	
Galway County Council	
Galway Harbour Company	
Galway Harbour Hotel	
Galway -Mayo Institute of Technology	
Heritage Council	
Irish Inland Waterways Association	
Irish Sailing Association	
Killary Adventure Centre	



IRELAND WEST TOURISM



Marine Institute
Foras na Mara



**An Roinn Ealaíon, Oidhreachta,
Gaeltachta agus Oileán**
Department of Arts, Heritage,
Gaeltacht and the Islands



Galway Harbour Company



Bord Fáilte



GMIT
GALWAY-MAYO INSTITUTE OF TECHNOLOGY
INSTITIÚD TEICNEOLAÍOCHTA NA GAILLIMHE-MÁIGH EO



NDP
NATIONAL DEVELOPMENT PLAN