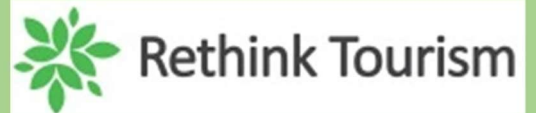




# Feasibility Study for Portrunny Amenity & Recreation Centre (“PARC”)



[www.portrun.ie](http://www.portrun.ie)



February 2018



This project received grant aid from Roscommon Local Community Development Committee under the County Roscommon LEADER Programme 2014 - 2020 which is financed by the Irish Government under the Rural Development Programme Ireland 2014 - 2020 and by the European Agricultural Fund for Rural Development: Europe investing in Rural Areas.



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# PART ONE: SITUATION ANALYSIS & OPPORTUNITY ASSESSMENT

## 1.0 Introduction

Portrunny is located in a highly scenic position on the western shores of Lough Ree. Waterways Ireland have developed a high quality marina and visitor facilities at Portrunny within an attractive bay. The marina offers a visitors a quiet rural stopping point along the western shores of Lough Ree, however visitors will currently find no facilities for eating out, visitor information or shop for provisions.

Portrun Development Association, a local voluntary not for profit community group, have undertaken a range of local infrastructure and amenity initiatives since their formation in 2001 and particularly since 2016. Most recently this has include the development of a high quality promotional website [www.portrun.ie](http://www.portrun.ie). This study has arisen in response to local community consultation which identified a need for a multifunctional community facility that in addition, would offer visitors information, facilities and a reason to stay for longer in the area.

*'We want someplace to go', 'a place to meet for a coffee and an ice-cream', 'a welcome & information centre for users of the Shannon', 'a place for tourism & recreation'*

Comments from local consultation undertaken by Portrun Development Association, 2016

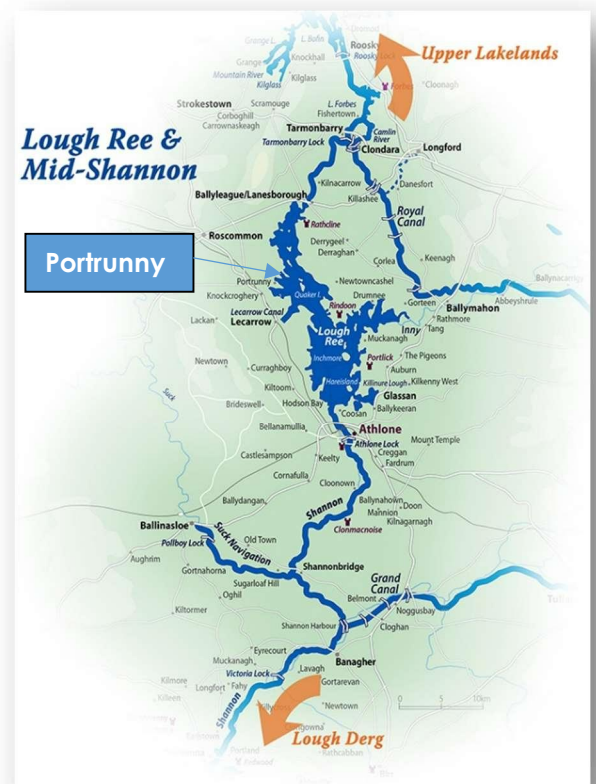
This feasibility study, commissioned by Portrun Development Association, builds on consultation undertaken with the community. The study was undertaken in two phases, with phase one consisting of site **evaluation & opportunity assessment** including:

- Site analysis, including site suitability,
- Market analysis, including potential user groups,
- Examples of relevant best practice,
- SWOT analysis

[The second phase, **review and recommendations**, focusses on:

- Facility design
- Management & organisation

An **action plan** provides a road-map for completion of this project, which has significant and demonstrable potential for the local community and the wider destination.][<sup>1</sup>



<sup>1</sup> To be completed in phase 2 of this project

## 2.0 Site Appraisal

The purpose of this section is to review the site, to consider the site context at a local and regional level, and to outline the proposed site, site uses and users.

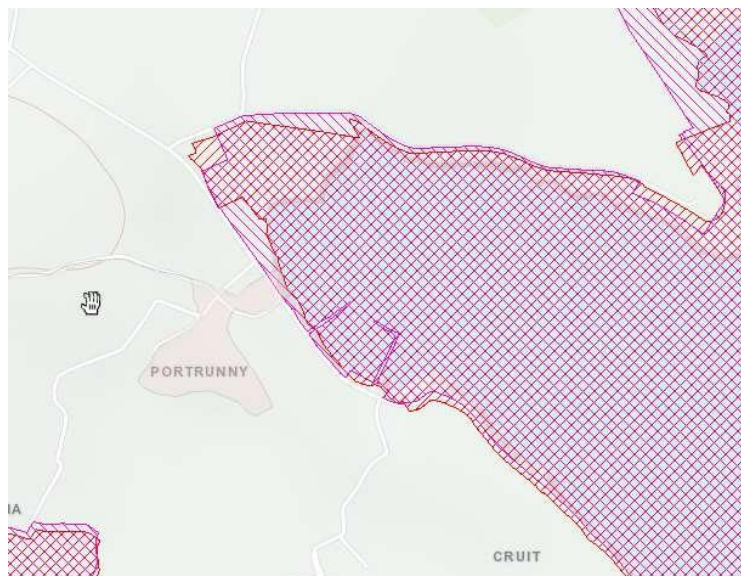
### 2.1 Portrunny

The name Portrunny (*Port Reanna*) is derived from Port Air Cinneach which means lay person in charge of a monastery, indicating its historic links to the area's significant religious heritage. In 540AD St Diarmuid used to travel from Lough Ree via Portrunny Harbour to Roscommon Abbey and the harbour continues to serve as a popular local connection to Lough Ree.

Portrunny is designated as a proposed Natural Heritage Area (pNHA), Special Protection Area (SPA), and Special Area of Conservation (SAC), as indicated in Figure 1 below. There are controls on development in on or near areas with such designations. Lough Ree is of ecological importance due to the variety of nationally rare plant species, it is also host to important bird habitats with a wide variety of species recorded. There are no designations for the specific site proposed for the PARC, however proximity of the designations for Lough Ree may have implications for development.

The designations highlight the ecological importance of Portrunny. One of the reasons people are attracted to this location is the pristine natural environment and the abundant birdlife. The opportunity to walk along over a kilometre of shoreline walk and to visit the nearby bogs, provide the local community and visitors with an opportunity to engage with nature and to spend time in a scenic part of rural Ireland. **The PARC facility will provide an opportunity to showcase the ecology of the area.**

**Figure 1: SAC and SPA Designations in Proximity to Proposed Site**



Source: [www.webgis.npws.ie/npwsviewer/](http://www.webgis.npws.ie/npwsviewer/)



### 2.1.2 Land Ownership

**The site proposed for the PARC is currently owned by Roscommon County Council.** While the council has not made a decision on the use of the land, it is thought members might look favourably on a well-considered proposal that would align with strategic objectives and be of benefit for the community<sup>2</sup>.

### 2.1.3 Engineering Services and Infrastructure

**Water:** Portrunny is served by a public piped water supply. The current water supply has the capacity to facilitate further development in the area.

**Sewerage:** There is currently no sewerage scheme serving the village. Existing dwellings are served by septic tanks. While a Part 8 application was completed for a new treatment plan this has not been scheduled for completion. Any development at the proposed site at Portrunny would be serviced on-site by means of an appropriate Waste Water & Sewage Treatment System. In the interests of environmental and groundwater protection and public health, it is essential that these systems are properly designed, installed and maintained to avoid environmental pollution. All such proposals shall be in compliance with the Environmental Protection Agency's *Waste water Treatment Manuals – Treatment systems for small communities, business, leisure centres and hotels* (1999).

### 2.1.4 Marina and Recreational Users

In the early 1970's Roscommon County Council constructed the first jetty to enable boats and cruisers to moor overnight. In 2006 Waterways Ireland invested in a new marina with floating jetty, including 24 additional berthing spaces, upgrading of the existing breakwater and additional parking. In the early 2000's Roscommon County Council constructed a playground at the marina. As the nearest waterway amenity to Roscommon town, Portrunny is in continuous use by a range of users throughout the year, both from the local community and from further afield, attracting domestic and overseas visitors.

In addition to passive recreation, walkers and picnickers, the harbour at Portrunny is used by a wide variety of recreational users. These include:

- **Visiting cruisers**
- **Roscommon Sports Partnership** (kayaking courses during the summer months and kayaking trips and expeditions for more experienced Kayakers. Courses run during the day for children with adults being catered for with evening classes)
- **Irish Civil Defence** - training
- **Roscommon Sub Aqua/Irish Underwater Council** (weekly training during summer months)
- **Triathlon 2017** - Athlone Triathlon Club in conjunction with Waterways Ireland organise Triathlons in the area, consisting of 5km run, 22km cycle and 750m swim.
- **Boat Club** - The local boat club was established in the 1960s. Classes were run to build boats in some years during the winter. The decline of the Boat Club occurred in the 1980s due to emigration. Portrunny is visited by the Lough Ree Regatta on an annual basis.
- **Fishing Competitions**
- **Shannon View Game and Wildlife Association**
- **Pheasant and Mallard Breeding Hatchery**
- **Brothers of Charity** – bringing children and adults with intellectual disabilities to the playground

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<sup>2</sup> Telephone conversation with Roscommon County Council, 11/12/17

## 2.2 Proposed PARC Initiative

### 2.2.1 Site Location and Use

This initiative relates to a specific site adjacent to the existing marina area, as indicated in Figure 2 below.

**Figure 2: Proposed PARC Site Location**



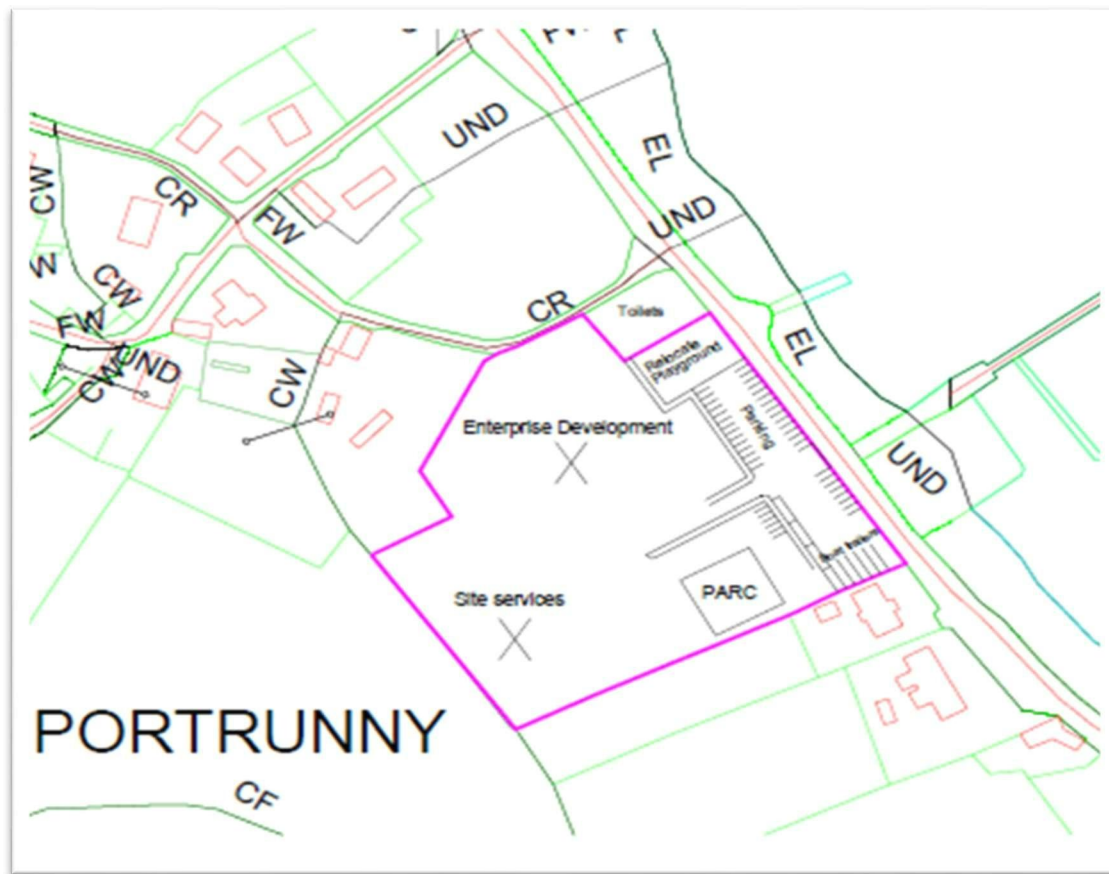
A range of uses are proposed for the **overall site**, as indicated in Figure 6 below, including:

- Amenity & Recreational Centre (PARC),
- Public car park including parking for vehicles with boat trailers and associated public lighting,
- Reallocation of public playground and installation of new outdoor exercise equipment,
- Potential sites for enterprise development,
- Site services.

Portrun Development Association have proposed indicative uses for the site, as indicated in Figure 3 below.



Figure 3: Proposed Site Uses<sup>3</sup>



### 2.2.2 Proposed Portrunny Amenity & Recreational Centre (PARC)

Proposed uses **within the proposed PARC facility** include:

- A **reception centre / tourist information** including Wi Fi area,
- A **multi-purpose space** to accommodate functions, training, and emergencies services on River Shannon,
- **Facilities to support outdoor activities** such as toilets and showers,
- **Café / restaurant** ("Central PARC"),
- **Meeting lounge**,
- **Storage Area**.

This initiative could provide a **range of facilities** that would benefit the local community and visitors to the area, including:

- Facilities that support outdoor activities that lead to enterprise development e.g. bike hire, kayaking and boat hire,
- Hospitality facilities e.g. café / restaurant,
- Meeting place for community groups and government agencies,
- Training facility for various groups and organisations, including emergency services and search and rescue,
- Venue for hosting water based festivals and competitions.

<sup>3</sup> Source: Portrun Development Association

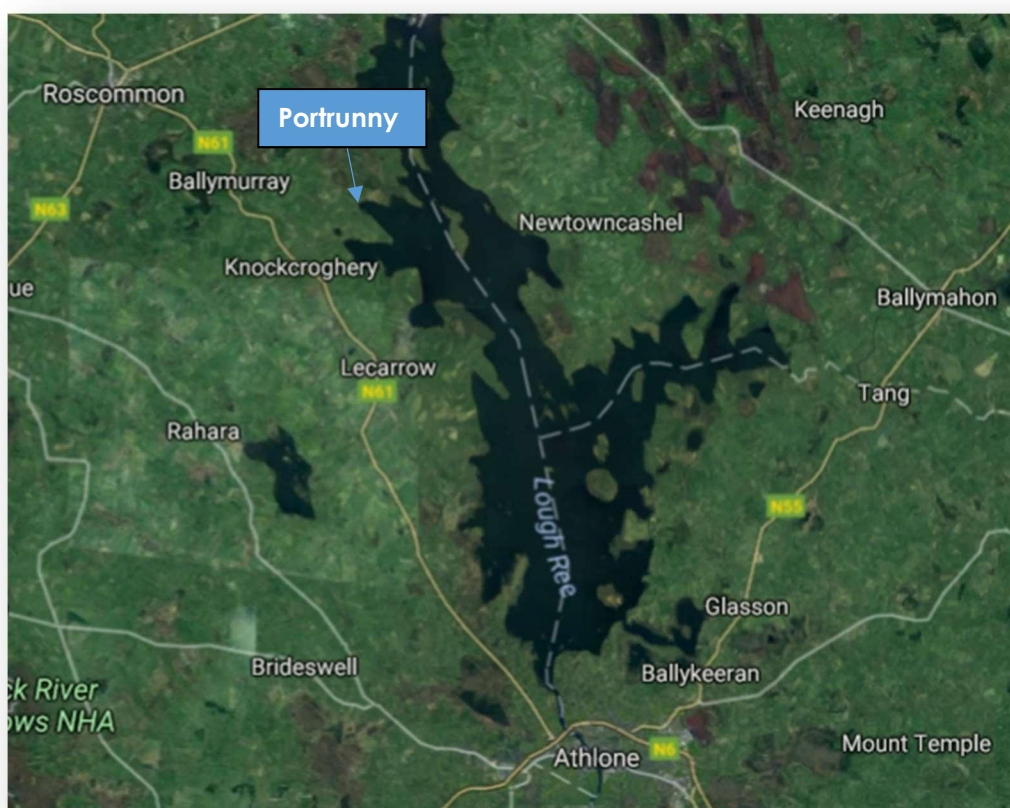
**User groups** that could benefit from such a facility would include:

- Local community groups,
- Domestic and overseas visitors to the River Shannon,
- Government agencies,
- Emergency services/volunteer groups,
- Sports organisations/clubs including sub-aqua, triathlon, kayaking, boating, sailing, swimming, walking, and cycling,
- Private enterprise e.g. boat hire, cycle hire, guided tours, hospitality etc.

### 2.3 Local Context

Portrunny is located on the north-west shore of Lough Ree in County Roscommon, 8km south-east of Roscommon town and 25km to the north of Athlone, as shown on Figure 4 below. The settlement, loosely clustered around Portrunny Harbour, had a hinterland population of approximately 529 in 2016<sup>4</sup>.

**Figure 4: Location of Portrunny in context of Roscommon and Athlone**



The county town **Roscommon** with a population of almost 6,000 people, has a rich built heritage and a wide range of community amenities. There is a volunteer run visitor centre where visitors can find out about Roscommon Castle and things to see and do in the area. Loughnaneane Park is situated in the town centre, behind the old gaol. It contains a children's playground, outdoor exercise equipment, a lakeside walkway, picnic tables, and Roscommon

<sup>4</sup> Census 2016, CSO Ireland

Castle. Roscommon is located 30km from the M6 Dublin-Galway motorway and the rail station offers services to all stations on the Dublin- and Westport/Ballina and Galway line. Major national roads lead from Roscommon to Sligo, Longford, Athlone, Castlebar, Galway and Dublin. Bus Éireann runs regular bus services to other major towns from the Mart Road.

Nearby settlements and attractions include:

- **Knockcroghery** 'Cnoc na Crocaire': is located to the south-west of Portrunny. The village, known for its Clay Pipe Museum and the Knockcroghery Fair, has a picnic area by the bank of a stream at the northern end of the village.
- **Kilteevan** 'Cill Taobháin': is a parish located 6 km to the east of Roscommon town, and 9 km to the north of Knockcroghery village. The community association are currently developing a bog walk (for more information see 2.5.3). The village contains a Catholic church, former mass rock, community centre, primary school, public house, karting track and GAA park.
- **Lanesborough-Ballyleague** *Béal Átha Liag/Lanesboro*: is located 15km to the north-west of Roscommon town, with Lanesborough on the Longford side of River Shannon and Ballyleague on the Roscommon side. The historic town is known for its angling and hosts the Lough Ree Angling hub with several international angling events held there. Lanesborough-Ballyleague is a popular stop-over for pleasure boats on the River Shannon navigation system. Lough Ree is just to the south and stretches almost 30 km to Athlone. Upstream the Shannon runs 40 km to Carrick on Shannon and to the Shannon-erne Waterway. A sailing regatta takes place in the town and there is a focus on food tourism, with the Taste of the Lakelands Food Festival held in 2016.
- **Mote Park**: Mote Park is a popular walking and amenity area for Roscommon town and surrounding areas. The 650 acre scenic forest setting provides habitats for a range of flora and fauna including the rare red squirrel. The forest provides opportunities for many forms of outdoor pursuits including hiking, walking and animal bird-watching. There are two way-marked walking routes including Mote Park Heritage Walkway is a 20km (approx) walk through open farmland, forest and hillside, and the shorter Croften looped woodland trail. Other facilities include an orienteering course and the Mote Park Interactive Heritage Tour with twelve points of heritage Interest brought to life through stunning video footage and interviews with locals, historians and biodiversity experts. Highlights include locals recounting their memories of Mote Park House, close up footage of the Lion Gate, The Red Squirrel feeding project, the area's connection to St. Coman, a tour of the Mote Park House Cellar ruins and how the woodland in Mote Park is managed
- **Lecarrow** 'An Leithcheathrú': on the shores of Lough Ree has a recently refurbished marina with a Waterways Ireland shower and toilet block. Lough Ree can be accessed by the scenic Lecarrow Canal. A short walk from the marina Coffey's bar and shop and the renowned Yew Tree restaurant – a popular stop off for people cruising the Shannon. Close to Lecarrow is the **Rinn Dinn Peninsula** and the Rinn Duin Castle Estate, one of the most well-preserved deserted Norman towns in Ireland. Its grounds contain nine heritage sites including the castle, gatehouse, windmill, church, and a perimeter wall with three towers, a hospital and a bee pole. There is a looped 4 km sign posted walking trail which will guides visitors through the sites and begins at St John's House, a about a 1.5 mile walk from the marina.

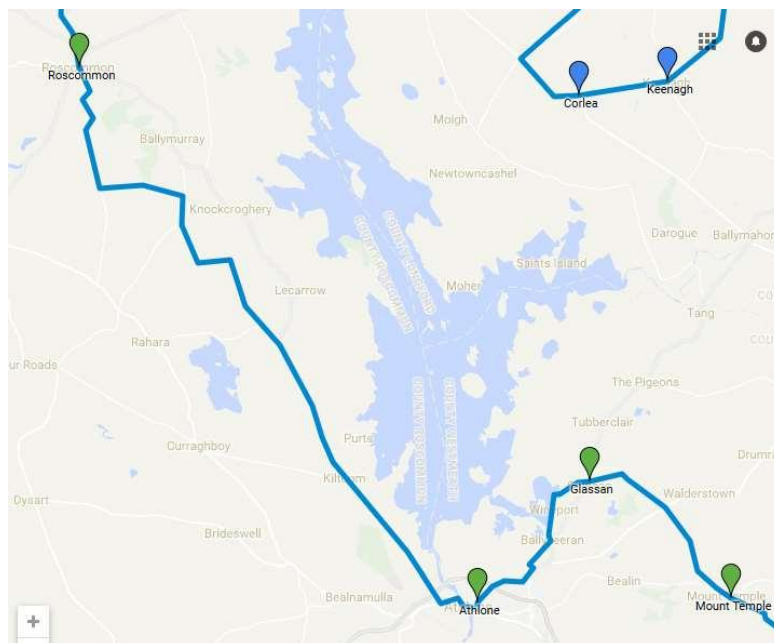
## The Táin Trail

The 575km/365 miles Táin Trail walking/cycling route is a loop which runs from Rathcroghan in Co. Roscommon, through County Longford, on to the Cooley Peninsula in Co.Louth and back again. It is fully signposted with distinctive Brown Bull finger post signs, as well as striking pictorial

maps located in key towns along the route. The modern version of the trail was initially set up in 1985-86 to ring the Cooley Peninsula in County Louth, but was then extended to encompass the complete route followed by the rampaging armies of the legendary Queen Maeve of Connaught, from Rathcroghan in County Roscommon to the Cooley peninsula in Co Louth.

The Táin Trail is the longest and most historic route in Ireland. It retraces the trail taken by Queen Maeve of Connaught and her armies in the Irish epic The Táin Bo Cuailgne, The Cattle Raid of Cooley – the most famous of Irish sagas and one of the most ancient epics of Northern Europe. The trail takes you not only to the legendary places of the Táin but through some of the most beautiful countryside in Ireland, land steeped in history and hiding a treasure trove of ancient sites and majestic scenery.

**Figure 5: Táin Trail**



## 2.4 Regional Context

Lough Ree is the fifth largest lake in Ireland and the second largest on the River Shannon system after Lough Derg, as shown on Figure 6 below. The lake is popular for boating and angling, with the towns of Athlone to the south and Lanesboro to the north, popular activity hubs. Portrunny is centrally located on the Shannon River, in close proximity to large urban areas.

Lough Ree has numerous islands including the 58ha/143 acre **Inchcleraun** (*Inis Cloithrinn*) or Quaker Island where St Diarmuid's Holy Well and Abbey were founded in the 6<sup>th</sup> Century and where the ruins of seven churches can be found.





**Hodson Bay** is located 8km north of Athlone and 21km to the south of Portrun with facilities including the 4\* Hodson Bay Hotel and Leisure Centre and the **Baysports** recreation centre. Baysports offers visitors one of Ireland's premier waterparks (adult 15 years + €17, child 6 -14 years €12, junior WP 4-6 years €4); kayaking (single kayak/€22 per hour, double kayak/€32 per hour); Stand-up-Paddling (SUPing) €22 each per hour), pedal boats (can seat 4 people) €32 per hour per boat. Admission to the park is every 15 minutes.



Lough Key Forest and Activity Park ([www.loughkey.ie](http://www.loughkey.ie)) is located 57km to the north of Portrunny. The facility, a joint venture between Roscommon County Council and Coillte includes a visitor centre with Lakeside



Café/restaurant, caravan-park with 46 pitches, 50-berth marina, Moylurg events room, visitor information and shop.



The world of adventure includes Adventure Play Kingdom, Boda Berg, Lough \Key Experience with Tree Canopy, Orienteering and Wheel-O, the 800 acre park and historical estate, and walking and cycling trails.

**Figure 6: Regional context of Lough Ree**

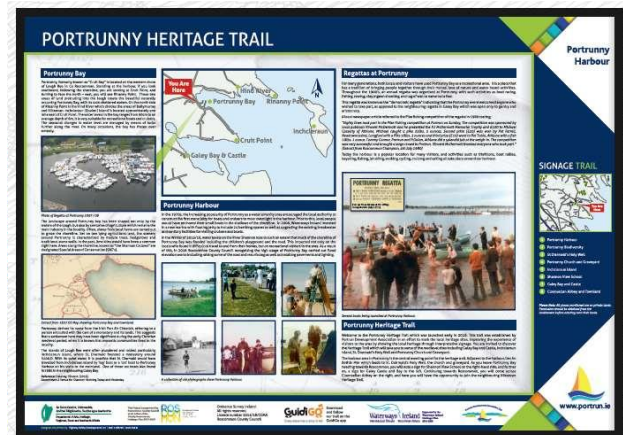


Source: [www.european-waterways.eu](http://www.european-waterways.eu)

## 2.5 Current Initiatives Underway or Planned

### 2.5.1 Portrunny Heritage Trail

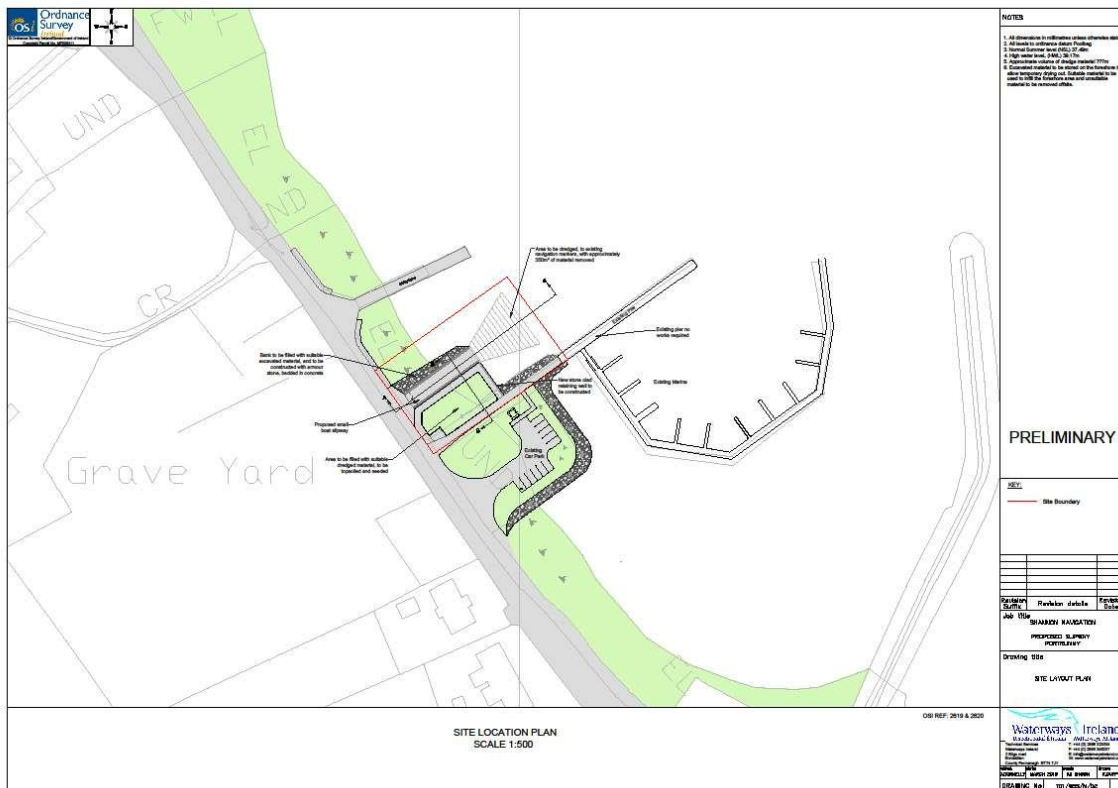
Portrun Development Association are currently in the process of implementing a Portrunny Heritage Trail to mark significant heritage sites and to provide opportunities to link with neighbouring communities along Lough Ree. This project aims to help protect the community's identity through the documentation of culture and heritage via interpretive signage; and to improve well-being through the encouragement of use of the heritage trail. It is envisaged that the trail will be maintained by the Portrunny Tidy Town Action Group with the assistance of schemes such as the TUS Community Work Placement scheme.



### 2.5.2 Portrunny Slipway

Development of a slipway at Portrunny is underway, jointly funded by Roscommon County Council, Inland Fisheries Ireland and Waterways Ireland. This will enhance existing facilities and maximise return on investment in the area by Waterways Ireland and Roscommon County Council through **encouraging greater use of and access to Lough Ree by pleasure-craft and anglers**. Figure 7 below shows the plans for the new slipway at Portrunny.

**Figure 7: Preliminary Plans for New Portrunny Slipway**





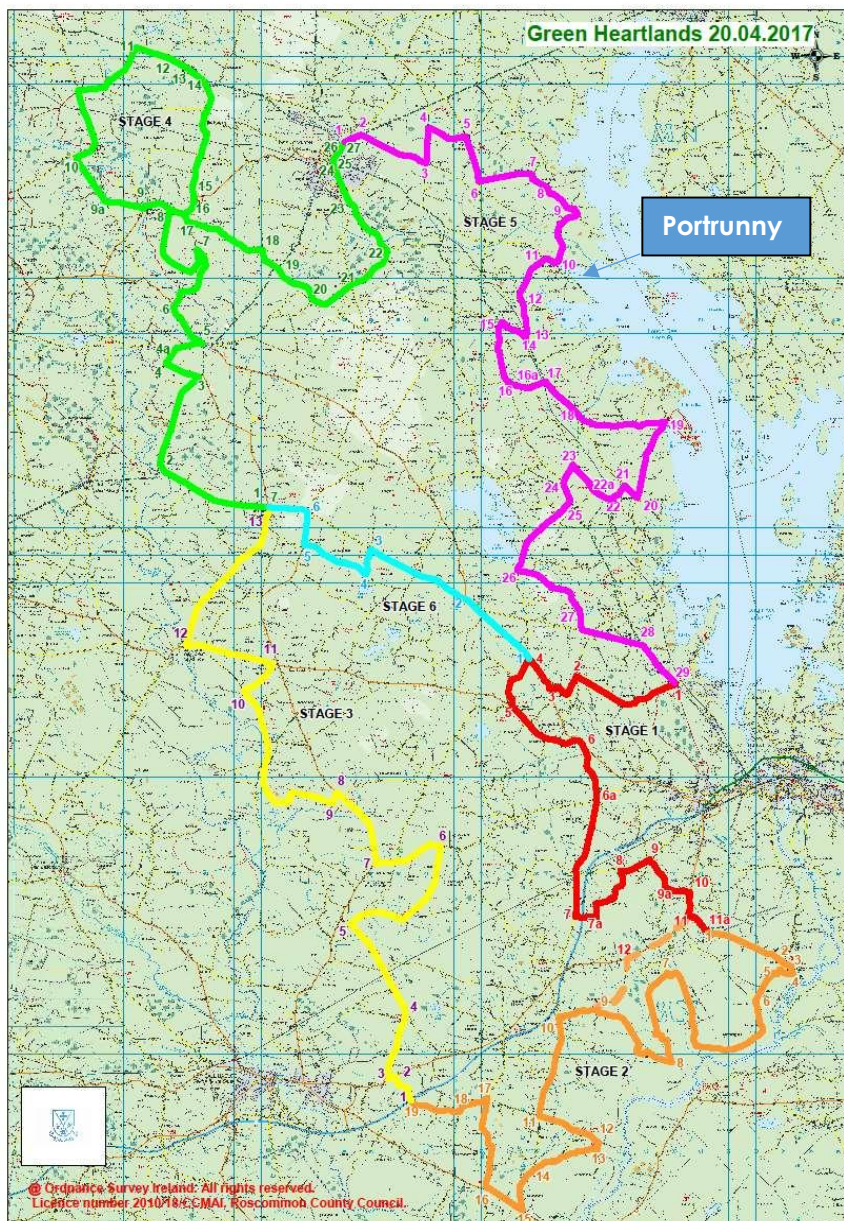
### 2.5.3 Kiltveevan Bog Trails

A 5km trail around the bog in the neighbouring Kiltveevan community is currently almost finished. This will include interpretation and seating. The community plan to develop further trails. There could be an opportunity, subject to discussion between Portrun Development Association and Kiltveevan Community Association, to develop a link between PARC and the Kiltveevan Bog Trail, with PARC functioning as a starting point with car-parking, bike hire and information available.

### 2.5.4 Green Heartlands Cycle Route

The new Green Heartlands Cycle Route, as shown in Figure 8, will be coming down by Bracknagh onto Cloonmore heading through Kiltveevan bogs and throughout Roscommon. This will include two family friendly loops.

**Figure 8: Indicative Map of Green Heartlands Cycle Route**



### 2.5.5 Lough Ree Island Access

Waterways Ireland have advanced plans to install pontoons (floating docking stations for cruisers) in close proximity to islands in Lough Ree near Portrunny. This may include Inch Clearún Island (Quaker), Hare Island and Inch Bofin.

## 2.6 Conclusion

Portrunny is strategically located in the heartlands of Ireland, near the county town of Roscommon and with a range of places to visit and things to see and do in the area. While there are currently many activities and attractions in the area the areas currently lacks a hub that can direct visitors to these places. **The proposed PASRC facility will complement, rather than displace, existing and proposed amenities in neighbouring communities**, and provide an opportunity for visitors, and people in the local community, to discover more in the local area.

**There are a range of relevant local strategic initiatives underway**, including the forthcoming development of a Portrunny Heritage Trail and Portrunny Slipway. The heritage trail will help link communities along the shore of Lough Ree and contribute community well-being. The slipway will maximise return on investment by Waterways Ireland and Roscommon County Council in the area to date and encourage greater use of the facilities at Portrunny and attract more people to the area.

With a range of local initiatives currently underway and planned, including the Kiltewan Bog Trails and the Heartlands Cycle Route, **there is joined up thinking taking place between Portrunny and neighbouring communities** which will together add value to the visitor opportunities in the area, and strengthen the case for a community and visitor hub/trail-head in the area.

**The site proposed for PARC is strategically located** at the heart of the Shannon system, and at the closest access point to Lough Ree from Roscommon town. There is **community support** for a facility that would be of benefit for the local community and visiting lake users alike at this popular and scenic location. PARC can offer a coordinated approach to the promotion of local natural and built heritage, activities in the area, and for access to the islands of Lough Ree. Critically it can **act as a visitor hub for this part of Roscommon and Lough Ree**, providing a reason for visitors to dwell in the area, encouraging increased tourism revenue spend and enhanced visitor satisfaction.

## 3.0 Strategic Context

This section considers relevant national, regional and local strategic plans that cover the Roscommon and Mid-Shannon area, and that relate to this study.

### 3.1 Regional Plans & Policies

#### 3.1.1 Regional Planning Guidelines for the West Region 2010-2022

The Regional Planning Guidelines (RPG) were adopted by the West Regional Authority in 2010 following a review of the previous guidelines for the period 2004-2016. The guidelines, which cover the counties of Roscommon, Mayo and Galway, are a long term strategic planning framework for the region, consistent with the National Spatial Strategy 2002-2020. Thriving towns and villages are identified as a strength in the RPG, with facilitation and promotion of **place-making**, and **opportunities for employment** included as opportunities in this area.<sup>5</sup>

Relevant policies, discussed in more detail in appendix 2, focus on **support for water-based activities, rural tourism along with support for sustainable tourism on the River Shannon corridor which is complementary to the natural environment, and support for the development of cultural facilities.**

#### 3.1.3 Mid-Shannon and Lough Ree Project Development Study' (2010)

This study was commissioned by Fáilte Ireland and Waterways Ireland working with North Tipperary, Offaly, Galway, Roscommon, Westmeath and Longford County Councils and Shannon Development. The purpose of this study is to provide a set of recommendations for consideration by tourism authorities, waterway managers, local authorities and funding agencies.

The study identifies the principal tourism needs in the area as being to:

- develop strong products,
- provide more access to water activities for visitors to the area, and develop activity visitor services around a set of activity hubs,
- develop more opportunities for visitors to experience trips on the waterway, including a regular waterbus service, and
- draw attention to the natural heritage of the area and provide sustainable opportunities to appreciate the spectacular wetland bird assemblages and the natural and cultural heritage of Ireland's bogs.

The study's main purpose was to recommend projects that could be developed sustainably in the area to **improve the tourism economy**. The study includes an action plan with a range of programmes designed 'to increase the visibility, appeal and ease of use of the area for visitors and to ease self and tour operator packaging of the best aspects of the area'<sup>6</sup>. Programme 3 in the study's action programme, as outlined in Table 1 below, identifies four locations for **activity hubs** with improved access to water based activities. Portrunny is identified as one of the four sites. **Recommended facilities** include changing facilities, equipment hire, day boat hire and instruction room, with the opportunity to pre-book activities. Programme 14 outlines Settlement Opportunities. **For Portrunny this is envisaged as 'Provide shore side activity services, space accommodation and seasonal café'<sup>7</sup>, with lead partners listed as Waterways Ireland and Roscommon County Council.**

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<sup>5</sup> Regional Planning Guidelines for the West Region, 2010-2022, page 34

<sup>6</sup> Mid-Shannon and Lough Ree Project Development Study' (2010), page 37

<sup>7</sup> Mid-Shannon and Lough Ree Project Development Study' (2010), page 49



### 3.1.4 Fáilte Ireland Midlands Study

A strategy is currently being developed for the Midlands region as a distinct brand for Ireland. This study will define the branding and wider development strategy for the region. The study is jointly funded by Roscommon, Westmeath, Longford and Offaly County Councils and by Fáilte Ireland, Waterways Ireland, National Parks & Wildlife Service and Bord Na Mona. The study is expected to be completed by May 2018. **It is understood that the study will focus on 'Activities in Nature' and that this will be based mainly on the Shannon corridor and the Bere Breffni Way<sup>8</sup>.**

### 3.1.5 Lough Ree Study

A study is currently being completed to define a roadmap for Lough Ree in terms of key access points and for access to islands. This study will also consider access to wilderness in the area. This study, currently being completed by Deirdre Black, will indicate that **Portrunny is a preferred access point for the islands of Lough Ree, particularly Inis Clearún (Quaker Island)<sup>9</sup>.**

## 3.2 County Plans & Policies

### 3.2.1 Roscommon County Development Plan 2014-2020

The county development plan outlines Roscommon County Councils strategy for the county which aims to enhance the quality of life for residents of the county. Relevant several strategic aims, objectives and policies which relate to the study area are outlined in Appendix 2. Tourism is recognised as playing an increasingly important role in the economy of Roscommon, with Lough Ree and the Shannon system having opportunities to generate economic activity through water based activities.

The corresponding vision for tourism in the plan is that the county will capitalise on key natural resources such as Lough Ree and other waterways. The plan indicates the council's support for the development of facilities that, in appropriate locations, support the development of waterways based tourism, with Portrunny identified as one such place. However the plans indicates that any such development must not adversely affect the integrity of designated areas, with appropriate assessment required if deemed necessary.

Given that the PARC facility will provide recreational facilities of benefit to locals and visitors alike in tandem with the provision of community facilities, the plans policies with regard to community facilities are worth noting. **This includes the recognition of the importance of the provision of community facilities in building community cohesion, and of the provision of recreation facilities as a means to enhance the health and quality of life of local communities, for which the plan indicates the councils support.**

### 3.2.2 Roscommon Local Economic & Community Plan (2016-2021)

The proposed PARC development accords with the vision, high level goals and the wider actions and outputs outlined within the plan, particularly in relation to the provision of **enhanced tourism, community, sport and recreation facilities** and opportunities in County Roscommon.

## 3.3 Local Plans & Policies

### 3.3.1 Portrunny Tourism & Amenity Action Plan (2006)

This objectives of this aspirational plan, produced for Roscommon County Council, and which could be considered typical of the era, relate to enhancing the role of Portrunny within the county. This included a high level of residential, tourist and amenity based development and it is understood there was strong community opposition to these plans due to the scale of the

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<sup>8</sup> Telephone conversation with Emer O'Dowd, Tourism Officer, Roscommon County Council, 06/12/17

<sup>9</sup> Telephone conversation with Eanna Rowe, Waterways Ireland, 07/12/17

development proposed. **This level of development, in the context of the current study, is not considered appropriate for Portrunny and this study is not related to any residential element.**

### 3.4 Fáilte Ireland Grant Funding

Fáilte Ireland launched their Grants Scheme for Large Tourism Projects in June 2016, with €65 investment available to develop new or enhance exiting tourism experiences and attractions. For the first call 115 applications were received from public private and voluntary sectors including community groups. Following evaluation 24 of these were invited to proceed to a second stage. None of these were in the Lough Ree area – one project was included for County Roscommon, an improvement plan for Strokestown Park & Irish National Famine Museum. It is expected that the next call for applications will be in Q3 2018.

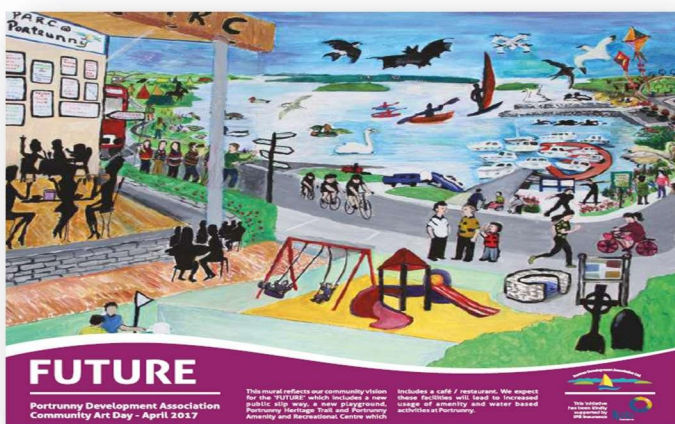
### 3.5 Conclusions

PARC is aligned with regional plans such as the Regional Planning Guidelines which **encourages the development of water-based activities** on inland waterways and rural tourism, as well the enhancement of social infrastructure and community development. **The wider Midlands study, which is currently being undertaken for Fáilte Ireland, will develop a new Midlands brand which will, it is understood, focus on 'Activities in Nature' – a good fit for the proposed initiative.**

PARC also supports the objectives of the Mid Shannon & Lough Ree Project Development Study report from 2010 such as the identification of Portrunny as an activity hub on Lough Ree. Recommended facilities at each hub included changing facilities, equipment hire, day boat hire and instruction room, with the opportunity to pre-book activities. This study is being updated with a specific report by consultant Deirdre Black, which it is understood will identify Portrunny as a hub with particular focus for access to the islands of Lough Ree.

The PARC concept is supported by the strategic aims, objectives and policies of the Roscommon County Development Plan 2014-2020, particularly in relation to the separate, but closely linked, aims of fostering greater economic activity based on tourism, and the enhancement of local communities through quality facility development. PARC also accords with the Roscommon Local Economic & Community Plan 2016-2021.

The PARC concept at this location can offer visitors to the area, including those from the local area, a better experience through the provision of modern comfortable facilities. However and perhaps more importantly PARC can offer the local community a hub – a place that **enhances the community and reinforces a sense of place for Portrunny** by:



- **Providing a place for the local community to gather** for events and festivals – promoting social inclusion,
- **Providing a trail head** for the Portrunny Heritage Trail and future trails – encouraging an interest in conservation and healthy living,
- **Provide a place for local enterprise** – contributing to local economic development and local opportunity.

## 4.0 Market Analysis

This section includes a product:market matching exercise to determine what mix of facilities would be of most appeal to the identified target markets.

### 4.1 Target Markets

To maximise the visitor opportunity it will be important to consider who are the likely target markets by country and within these markets which are the type of visitors or market segments most likely to be interested in a visit to Portrunny. By identifying these market segments, and their motivations, the focus then becomes the provision of suitable facilities and infrastructure to attract these visitors and provide them with the optimum experience. **Data on visitors to Ireland, to County Roscommon and core target market segments are included in appendix 3.**

Visitors, both domestic and overseas choose to travel along the unspoilt River Shannon for many reasons including for peace and tranquillity, abundant wildlife and birdwatching opportunities, for coarse and game fishing, to explore built heritage such as Clonmacnoise, and to visit the many pubs, restaurants and café. Above all it is a place to spend quality time together amongst in a highly scenic area. While Portrunny can offer many of these attributes it lacks a hub, a place for visitors to obtain refreshments – an opportunity to linger. **The proposed PARC facility would enhance the visitor experience** by providing a place to eat and drink, a place to find out more information on the local area and the wider county area – encouraging return visits and positive word of mouth referrals.

### 4.2 Product:Market Matching

This project is about provision of facilities for the community and for visitors. To ensure that the optimum range of facilities are provided for visitors, thus making Portrunny an attractive destination it is important that the product provided is matched to the market envisaged.

Table 1 below is a product: market matrix prepared for Portrunny and the associated shore based PARC facility in tandem with those key market segments identified in appendix 3 for the domestic and overseas visitor markets. This matrix identifies those activities which are likely to be of most interest to the widest range of visitors.

While a broad-brush exercise this approach clearly indicates those product areas which of most importance such as **heritage interpretation, visitor services and facilities such as a café and toilets, and hire of equipment.**





**Table 1: Portrunny Product/Market Matrix**

Market/Market Segments	Local Community	Domestic Ireland		Overseas (focus on Britain, USA, France, Germany and other Mainland Europe)			All markets	
		Connected Families	Footloose Socialisers	Culturally Curious	Great Escapers	Nature Lovers	Adventure & Activity	Special interest e.g. bird-watching
Product/Experience								
<b>Shore based activities</b>								
Heritage Interpretation	✓	✓		✓	✓			✓
Cafe	✓	✓	✓	✓	✓	✓	✓	✓
Community Space/Gallery	✓	✓		✓		✓		
Playground	✓	✓						
Toilets/Showers/Changing	✓	✓	✓	✓	✓	✓	✓	✓
Links to Walking Trails	✓	✓		✓	✓	✓	✓	✓
Canoe/Kayak/Bike Hire	✓	✓	✓		✓	✓	✓	
Visitor Information		✓	✓	✓	✓	✓	✓	✓

### 4.3 Conclusion

Overall the trend for overseas tourism growth in Ireland is strong, with record visitor numbers and strong growth forecast, although with potential for a soft growth or medium term decline in the UK market. While the main overseas visitor market for the West region is Mainland Europe visitors to Roscommon are more likely to come from the UK, with 45% of the overall share – from which it could be suggested that there is a potential negative impact from any Brexit associated downturn, and/or an opportunity to attract more of the Mainland Europe visitors who are coming to the West region. While domestic tourism has shown strong growth in recent years there has been a significant decline in domestic tourism numbers for County Roscommon in the last year.

In terms of overseas target markets, the most relevant are those from Britain, USA, Germany and France. Within these target markets the market segments of most relevance for the Portrunny & Lough Ree area are likely to be the 'Culturally Curious' and 'Great Escapers', and to a lesser extent the 'Social Energisers'. In terms of the domestic market it is envisaged that the 'Connected Families' segment is of most relevance to Portrunny.

**The type of facilities that are envisaged to be of most interest to overseas and domestic visitors are thought to be heritage interpretation, visitor services and facilities such as a café and toilets, and hire of equipment. These are the range of facilities that could be provided by PARC and which would increase the appeal of a visit to Portrunny and the wider County Roscommon area.**

While not the subject of this study there is a plan currently being considered to place a floating jetty alongside Inchcleraun Island to enable visitors to access the island. As indicated above in section 3.1.5, Portrunny will be selected as the preferred location to access Inchcleraun Island from the shore. **This reinforces the case for, and creates an opportunity for the proposed PARC facility to function as an on-shore visitor centre/facility for the island**, although an expansion to include this function would require a separate in-depth feasibility study.

## 5.0 Case Studies

This section reviews three places which although different in approach have elements which are relevant for the proposed Portrunny Amenity & Recreation Centre. Case studies include:

- Lough Boora, County Offaly
- Crough Patrick Visitor Centre, County Mayo
- Stella Maris Community Centre, Kilmore Quay, County Wexford
- Lakeside Centre, Ballyshannon, Co. Donegal
- Oxford Island Discovery Centre & Nature Reserve, Lough Neagh
- Tí Chulainn Cultural Activity Centre, County Armagh

### 5.1 Lough Boora, County Offaly



Bord na Móna harvested peat harvesting from Lough Boora from the middle of the 20th Century. The Lough Boora Mesolithic site was discovered in 1977 when what was first thought to be a stone track way was brought to the attention of the National Museum. This was investigated and found to be the storm shoreline of a post-glacial lake, a remnant of an era when the Shannon and its lakes – Lough Ree and Lough Derg covered more of the Midlands than today. Further investigation revealed the charcoal remains of ancient campfires, dated to between 6800 and 6500 BC, which were the temporary campsites of hunters during the Mesolithic era. This is thought to be one of the most important archaeological finds in Ireland as prior to its discovery it was thought the first human settlements were near to the coast and that the midlands remained uninhabited. Discovery of the Lough Boora Mesolithic site pushed the accepted date for colonisation of the midlands back by over 3,000 years.

Bord na Mona no longer harvest peat from the main site and Lough Boora ([www.loughboora.com](http://www.loughboora.com)) is now a sanctuary for wildlife and an amenity for the community – a place of quiet, relaxation and refuge. The new visitor centre, a partnership between Bord na Móna and Fáilte Ireland provides visitor information, public toilets, a cafe, picnic area and car park.

Facilities include:

**Café:** Open daily from 9.30am – 6pm in summer months, and open weekends from 11am – 4pm during winter months.

**Cycle and walking routes** including:

- Sculpture Park Route: 3.3km, short walking route with 24 works of art
- Mesolithic Route: 9.3km, walking and cycling route, site of national importance for Whooper Swans
- Farmland Route: 6km, walking and cycling route with bird hides

- Fynamore Lakes Route: 11.7km, walking route
- Turraun Route: 15.8km, walking and cycle route

**Bike hire:** available from 10am to 8pm, Monday through Sunday at a rate of €3/hour or €12.50/day for children, €5/hour or €30/day for adults, €50/day for a family, and €8/hour for a tandem bicycle. Bikes available include tandem, adult and child. Price includes cost of helmets and trailers available at no extra cost.

**Angling:** As areas of Lough Boora came out of commercial peat production, a number of still water fishing lakes were developed as both local and tourist amenities. The lakes were created by excavating the remaining peat and deepening the proposed lake bottom. The banks were reinforced and landscaping work carried out to provide shelter. Access roads, parking and picnic facilities were then developed. When the lakes were flooded, aquatic plants were introduced from waterways nearby and the lakes were stocked with a variety of game and coarse fish. Since development, each lake has undergone rapid naturalisation. The work was carried out by Bord na Móna in conjunction with advice provided by the Central and Shannon Regional Fisheries Boards. The creation of the complex of lakes has led the Shannon Fisheries Board to designate Kilcormac village as a new coarse angling centre. Most of the lakes do not have a closed season but best results can be achieved between the months of April and October. The only lake with a specified open season is Loch Clochan, which is only available between 1 May and 12 October, from 8am to 10pm.



**Bird-watching:** over 130 bird species have been recorded in the park, including the endangered wild Grey Partridge, many of which can be seen from bird hides located throughout the complex. These include one hide designed and sited to facilitate wheelchair access.

### **Management and staffing**

The café and bike hire operations are both franchised, with income from both combined providing 40% of overall operational costs, the balance is met by Bord na Mona. There is one full time staff member and one seasonal maintenance person, costs for both are met by Bord na Mona. There are also two seasonal guides.

### **Stages of development**

While trails had been developed over a 20 year period there was no point of arrival for visitors. In 2014 a joint project by Bord na Mona and Fáilte Ireland provided the financing to develop the visitor centre. Fáilte Ireland grant funding was 750,000€ with equal match funding from Bord na Mona.<sup>10</sup>

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<sup>10</sup> Conversation with Tom Egan, Manager of Lough Boora, 26/01/2018

## 5.2 Crough Patrick Visitor Centre, County Mayo

The Crough Patrick Visitor Centre or *Teach na Miasa* ([www.crough-patrick.com](http://www.crough-patrick.com)) is situated in Murrisk on the Pilgrim's path at the base of Crough Patrick Mountain and opposite the National Famine Monument. The Walsh family, who run the centre, aim to provide for the needs of pilgrims, climbers, archaeologists and nature lovers.

The director of Archaeological Excavations on the summit of Crough Patrick, Gerry Walsh, and his wife Gabrielle opened the Crough Patrick Information Centre at the foot of the mountain in March 2000. The Centre stems from the interest shown by the thousands of pilgrims and climbers in the archaeological discoveries on the summit. Gerry realised that people would like more information in an accessible and user-friendly way and he set about making his dream a reality. He also realised that people visiting the mountain were not being supplied with general information on the South Mayo region, an area of unspoilt natural beauty, so he decided to incorporate this into the Centre.

Facilities include:

- Family run café/restaurant - seating 50 inside and 40 outside on a terrace
- Craft shop - with local crafts, maps, books, walking sticks, socks & raingear
- Showers
- Lockers
- Visitor information and interpretation on history and archaeology of Crough Patrick
- Guided tours



## 5.3 Stella Maris Community Centre, Kilmore Quay, County Wexford



The Stella Maris Community Centre at Kilmore Quay, Co. Wexford ([www.stellamariscentre.com](http://www.stellamariscentre.com)) provides a range of community services and activities. This includes a cafe meeting rooms, training rooms, and functions rooms for small and large groups.

### 'The Centre' Café & Restaurant

provides a place for the community to gather and also serves the wider community through a meals-on-wheels service. This service operates from Monday to Friday and produces an average of 75 meals a week, distributed throughout the parish by a team of volunteers who take weekly turns. Initially staffed by volunteers the café now operates as part of a Pobal scheme providing employment for four people.



The café is open daily from Tuesday to Sunday with opening hours of Tuesday-Sat 9am to 2pm and Sunday 9am to 12.30pm



**Venue Hire** – the centre rents rooms to organisations and groups. This includes events and exhibitions.

**Clubs and groups** – several groups use the facilities, which provides an opportunity for people to meet.

**Management and staffing** – the centre has operated since 1994. Initial costs were covered by the local community, including bank loans. Funding has also come from LEADER. The centre is supported by annual fund raising events, in particular their summer Seafood Festival. The centre employs four full-time staff as well as varying numbers of part-time. These staff are funded through the Community Services Programme and TUS community Work Placement Scheme.



Lessons for Portrunny – The centre manager recommended starting small. Key issues are considered to be ongoing commercial viability. Obtaining an anchor tenant, ideally state funded, is strongly recommended. If a café is included there a good argument to operate this on a franchise basis – Stella Maris did this initially and then pulled this back in-house to ensure the hours they wanted the café to operate were covered<sup>11</sup>.

#### 5.4 Lakeside Centre, Ballyshannon, Co. Donegal

Lakeside Caravan & Camping Park ([www.lakesidecaravanandcamping.com](http://www.lakesidecaravanandcamping.com)) is located on the shore of Assaroe Lake five minutes' walk from Ballyshannon. Open from March to October facilities include a restaurant and dance area with lake views, modern toilet/shower block, disabled toilet, kitchen, TV room, games room, environmentally friendly play park, and full-size astro turf pitch. The restaurant and dance area can be pre-booked for parties, meetings and conferences.



Lakeside Centre is operated by Erne Enterprise Development Co. Ltd, a local community development company representing an active local network. Erne Enterprise is backed by Pobal. Properties controlled by the company include:

- **Lakeside Centre:** Home to a full sized all weather Astro Turf Pitch, environmentally-friendly children's playground, caravan & camping park with an on-site restaurant opening during the summer months. We also have meeting rooms to hire out and small offices for lease,
- **Tirhugh Resource Centre:** offices to rent and rooms for hire including an IT Training Suite,
- **Finner Business Park:** A cluster of incubator units for lease,
- **Portnason:** IT centre containing 5 hot desk spaces, 4 units of 1,000sq feet and home to the Emergency Call Centre controlled by BT.



<sup>11</sup> Telephone conversation with Manager John Dunne, who is happy to discuss any aspect further with Portrun Development Association (053 9129922).



**Management & Staffing:** The centre employs between ten and fifteen staff depending on the season. Staff costs are principally funded by Pobal. Several organisations contributed to the initial capital cost of the centre development in the early 1990's including the Irish-American Fund, cross border funding and LEADER. Running costs are covered by revenue from the caravan and campground.

The centre was initially set up to provide local employment. The owners of the building they now occupy went into receivership in the mid 1990's so they did not have initial construction costs. Six incubator units were built in the late 1990's which provide space for SME's on reduced rates with a maximum 3-year lease. These units were funded by IDI and Enterprise Ireland. While the initial operation was solely offices over the last 20 years they have added an all-weather pitch, environmentally friendly playground, caravan and camping facilities and now watersports. In 2005 a 10,000 sq.ft. IT centre was built, funded by IDI and Peace II, this now houses the 999 emergency call centre.

A suggestion for a similar centre is to provide space for exercise classes as these offer an income opportunity, this can be combined with a multi-functional space<sup>12</sup>.

### 5.5 Oxford Island Discovery Centre & Nature Reserve, Lough Neagh

Lough Neagh Discovery Centre ([www.oxfordisland.com](http://www.oxfordisland.com)), which opened in 1993, is located within the Oxford Island Reserve on the southern shore of Lough Neagh in Northern Ireland. The multi-functional centre includes the Loughside Café which seats 100, tourist information centre with gift shop, conference centre and offices for the Conservation Service and Education Team who run extensive, environmental education programmes to schools and community groups across Northern Ireland. There are three conference rooms of varying sizes with extensive views over Lough Neagh and the nature reserve. Events include festivals, birthday parties, star-gazing nights, pop-up exhibitions and art workshops.



**Marina:** the nearby Kinnego Marina is home to Lough Neagh Sailing Club, established in 1877. There are 190 fully sheltered berths and 10 moorings. Adjacent to the marina is a fully-serviced caravan park. Secured summer and winter storage is provided for 60 boats within the boat park on-site. Fully trained and qualified staff on site offer local knowledge, boat tuition and information on safety on Lough Neagh. Courses include powerboat instruction, sailing courses,

<sup>12</sup> Conversation with Eimear Keon, Erne Enterprise Development Company CLG, 26/01/18



personal watercraft, sea survival, VHF/DSC, first aid. Day tours are available of Kinnego Bay, Coney Island or private charter.

**Angling:** angling platforms offer the opportunity to fish for Roach, bream, perch and pike. A Coarse Angling Licence is required and the bag limit is two pike per day and pike over 4kg (8.8lb) must be returned to the water.

**Kinnego Bush Craft Centre** - which offers courses and programmes on the practical skills of camp craft, building shelters, making fires, wild food and plant identification for fresh faced beginner through to veterans of the outdoor pursuits. Kinnego Bush Craft also offer outdoor group bonding and team building workshops based around nature and basic survival principals along with how and why we should care for our surrounding environment.

**Arts Development:** The Arts Development Team based at Lough Neagh Discovery Centre develops programmes to meet local need and often acts as a first point of contact for artists and community groups. Artspace is a studio space located at the heart of the Oxford Island Nature Reserve. It is a large open plan space with a range of resources for artists.

**Camping and accommodation:** the 3-star campground is located within a picturesque setting and offers:

#### Caravans

- Motor / touring caravan spaces just £18 per night. Electric hook up £5 per night.
- No awning charge (not all pitches have awnings available).
- Electricity supply to caravan pitches.
- Disabled facilities – Wheelchair friendly
- Laundry facilities (£3 per token).
- Toilets and showers.
- BBQs on stand allowed.
- Dogs admitted on lead (excludes ecopod area).
- Children's play area.
- Boat trips arranged.
- Credit cards accepted (minimum £7 spend)
- Café on site (remains open weekends 1st Nov -31 Mar 2016)
- Opening times: 1 April – 31 October



**Ecopods:** Sleeping up to 4 adults or 2 adults and 4 children with 2 electric sockets, a kettle, fridge and lighting.

- £40 Per Pod, per night
- Returnable security deposit of £50.

#### Camping

- 10 Tent spaces only
- £12 per night based on 2 person tent
- £15.80 per night for 4 person tent, £6 per adult thereafter.
- £10 returnable deposit for site keys.

**Management and staffing:** The centre is owned and managed by Armagh City, Banbridge & Craigavon Council and staff are funded by the council. The multi-faceted centre attracts over 130,000 visitors each year. The centre was purpose built in 1993 and was initially going to be fee paying but that was stopped due to public concern, following this visitor numbers rapidly increased. The centre, which underwent a significant refurbishment in 2006, generates significant revenue from leasing conference and event space and has constant request from

businesses for enterprise and office space due to the location. The manager emphasised the need for storage space in any similar building<sup>13</sup>.

## 5.6 Ti Chulainn Cultural Activity Centre, County Armagh

Ti Chulainn Cultural Activity Centre ([www.tichulainn.com](http://www.tichulainn.com)) is located in the Ring of Gullion, functioning as a multi-function community centre, activity centre, conference and wedding venue. A range of activities can be provided including paintballing, archery, body zorbing, camp & bush craft, nite line, kayaking & canoeing, with local providers.



**Accommodation:** There are sixteen high-quality bed & breakfast/self-catering rooms in twin, double and triple configurations. Prices range from £32-50-40 pp sharing with discounts for group bookings.



**Conference Venue:** Ti Chulainn accommodates conferences, exhibitions, trade shows, training, seminars and team building events with a fully equipped 70 seat audio visual theatre, a large performance area capable of holding in excess of 200 visitors and complimentary off road parking area.

**Wedding venue:** Ti Chulainn is a registered venue for civil wedding ceremonies from 40 guests to larger events with up to 300 guests. Catering and bar service can be provided. Accommodation is available for the wedding party and guests.



**Management and staffing:** The centre is owned and managed by the community. The centre employs 3 full-time staff and 4 part-time. The revenue generated by the centre, principally from the accommodation, covers the costs of the centre. The centre was purpose built using a combination of local authority and PEACE II funding.

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<sup>13</sup> Conversation with Martin Smith, Manager, Oxford Island, 20/12/17

## 6.0 SWOT

This section summarises the Strengths, Weaknesses, Opportunities and Threats for PARC.

### 6.1 Strengths

<b>Strengths</b>	<b>Weaknesses</b>
<b>Opportunities</b>	<b>Threats</b>

#### Tourism & Recreation

- Location adjacent to Lough Ree and close to Roscommon town
- Existing infrastructure including marina including jetty and slipways, children's playground, picnic & resting areas, and walkways (e.g. "Croi" trail)
- Scenic character of the lakeshore
- Aligned with regional and county level strategic objectives for tourism

#### Community & Enterprise

- Large townland/hinterland population
- Established community groups including an active Local Tidy Towns Action Group in place
- Availability of TUS Community Work Placement scheme workers
- Strong community spirit
- Aligned with county development objectives for community inclusion
- Several local small scale therapy and art businesses

#### Heritage

- Proximity of Quaker Island /Inis Clearun (Monastic Site)
- Local points of interest such as St Dermot's Well and Portrunny Graveyard
- Nearby attractions such as Galey Castle
- Proximity of Lough Ree SAC

#### Accessibility

- Existing public toilet (owned by Waterways Ireland) is wheelchair accessible

### 6.2 Weaknesses

<b>Strengths</b>	<b>Weaknesses</b>
<b>Opportunities</b>	<b>Threats</b>

#### Tourism & Recreation

- Limited accessibility
- Limited information/signage
- Lack of commercial /retail mix e.g. café/shop, boat & bike hire
- Limited accessibility to existing public toilets
- Lack of showers, changing rooms for visitors/users
- Limited public seating areas
- Campervans parking in designated picnic area
- Existing infrastructure is need of significant investment/upgrade

#### Community & Enterprise

- Lack of community centre/meeting point since closure of pub
- Lack of a community centre or enterprise centres for local businesses

## Heritage

- Limited accessibility/ information /signage

## Accessibility

- Limited access to playground and picnic area
- Lack of designated wheelchair car parking spaces
- Lack of designated footpaths for mobility impaired

## 6.3 Opportunities

Strengths	Weaknesses
Opportunities	Threats

### Tourism & Recreation

- Centre could enable hosting of fishing competitions and water based festivals
- Portrunny to be identified as access point for Lough Ree Islands e.g. Inchcleraun
- Potential to link up with adjoining tourism & recreation infrastructure e.g. Rinn Duin Looped Walkway
- Slipway to be upgraded by RCC before end of 2018
- Meeting place/training facility for community groups, government agencies, emergency services, or search & rescue

## Community

- Community enterprise development which could provide hub for local businesses
- Centre will foster social inclusion, providing community with a focal point

## Heritage

- Promotion of Portrunny Heritage Trail and provision of information on natural and cultural heritage in the centre

## Accessibility

- Provision of accessible playground would provide facilities to benefit existing users

## 6.4 Threats

Strengths	Weaknesses
Opportunities	Threats

### Tourism & Recreation

- Other destinations around Lough Ree become more attractive in comparison to Portrunny over time with reduced return on existing investment e.g. marina and toilets
- Potential for littering/pollution from increase in visitor numbers
- Potential further deterioration in infrastructure without investment

## Community

- Potential diminution of support from stakeholders without the required investment

## Heritage

- Potential for anti-social behaviour e.g. vandalism from increase in visitor numbers

## Accessibility

- Exclusion of users without investment

## 7.0 Summary

PARC will provide much needed infrastructure for local community and visitors to the area, including café, changing rooms, a meeting area and reception area. There is demand for further spaces, either co-located with the proposed centre or nearby on the same site, which could be used leased to local businesses including therapy, art and craft, providing a revenue stream. A number of businesses have expressed interest in such an arrangement.

The provision of a focal point for the community at this popular location would enhance social inclusion and provide a place for the community to meet, reinforcing social cohesion, contributing to the objectives of the county development plan and making Portrunny a better place to live and to visit.

PARC would be ideally situated at the closest Lough Ree access point to Roscommon Town. By providing information on things to see and do nearby PARC will encourage increased visitor dwell time and spend in the area – contributing to Roscommon County Councils objectives for tourism development. As well as serving the needs of the local community of Portrunny, the facility can encourage greater use of Lough Ree and a focal point to encourage visitors to stay for longer.

Inland Fisheries Ireland and Waterways Ireland have indicated that provision of a hard surfaced area would encourage greater use by water-craft users, including anglers and kayakers, bringing more visitors to the area, and in turn making any associated commercial enterprise more viable.

With Portrunny identified as an amenity area in relevant plans including the Roscommon County Development Plan and the forthcoming Lough Ree plan, the proposed development is aligned with strategic decision-making. The proposed PARC facility will support infrastructure at Portrunny Bay including the new marina, proposed slipway and heritage trail, capitalising on existing investment in the area and further developing a clustered recreational facility and attraction.

It is envisaged that the PARC facility will include:

- **Reception centre / tourist information** including Wi Fi area,
- **Multi-purpose space** to accommodate events, functions, exhibitions and training,
- Facilities to support outdoor activities such as **toilets, showers and changing rooms**,
- **Café / restaurant** ("Central PARC"),
- **Enterprise centre/co-working facility**,
- **Storage Areas.**

In addition to the PARC building it is envisaged the site as a whole will include:

- **Parking area** for boat trailers and vehicles,
- **Storage** for kayaks/other watercraft and other recreational equipment.

Part two of this study will provide an **architectural vision strategy** for PARC, including site layout and indicative costs, along with proposed building components and site plan. This part of the report will provide detail on facility management and funding opportunities. This will be summarised in the form of an **action plan** with clear responsibilities and timelines indicated.

## Appendix 1: List of Consultees

We have undertaken consultations with representatives of a range of relevant organisations including:

- Roscommon County Council – Tourism Officer, Community & Enterprise, Engineering
- Fáilte Ireland
- Inland Fisheries Ireland
- Waterways Ireland
- Portrunny Therapies
- Lough Ree Boat and Bike Hire
- Vertical Kayakers
- Irish Civil Defence
- Roscommon Sports Partnership
- Stella Maris Community Centre, Kilmore Quay, County Wexford
- Oxford Island Discovery & Nature Centre, Lough Neagh, County Antrim
- Lakeside Centre, Ballyshannon, County Donegal
- Ti Chulainn Cultural Activity Centre, County Armagh



## Appendix 2: Relevant Policies and Plans

### A2.1 Regional Plans & Policies

#### A2.1.1 Regional Planning Guidelines for the West Region 2010-2022

Relevant **tourism** related policies and objectives set out in the RPG include:

- EDP16: Support and promote innovative development, marketing and support all types of activity holidays and activity events in the West Region including walking routes development, cycling routes development and **water based activities** subject to relevant environmental assessment including Habitats Directive Assessment (where appropriate) of all tourism plans and projects, in order to minimise environmental impact.
- EDP66: Support the sustainable development of rural tourism resources such as **inland waterways**.
- EDP70: **Support rural tourism initiatives** which support sporting events; village enhancement; heritage management and energy conservation.<sup>14</sup>
- EDO18: Promote sustainably planned tourism (enhancing existing or newly planned resources) with particular emphasis on less developed areas to maintain the region's share of the market, developing new products, services and facilities.
- EDO19: Promote **special interest tourism activities** such as adventure sports, sports events, out---door pursuit tourism holidays, **marine based tourism**, water sports; horse riding, hill walking, angling & fishing and golf, and the establishment of walking and cycling routes within the region and place emphasis on their contribution to healthy and active lifestyles subject to relevant environmental assessment including Habitats Directive Assessment (where appropriate) of all tourism plans and projects, in order to minimise environmental impact.<sup>15</sup>

In relation to **social infrastructure and community development** the RPG's state '*Recreational and leisure activities are major contributors to good health and a high quality of life*' and includes the following policies:

- SCP15: Support a **co-ordinated approach to the development and promotion of sustainable tourism** on the Shannon River Corridor which is complementary to the natural environment and which is informed by relevant environmental assessment. The process must be informed by Habitats Directive Assessment including assessment of potential cumulative impacts on Natura 2000 sites.<sup>16</sup>
- SCP16: Support the **development of cultural facilities** such as theatres, exhibitions spaces and workshops. This will be achieved through proper planning and sustainable development (Section 7.1.1 applies).<sup>17</sup>

#### A2.1.2 Mid-Shannon and Lough Ree Project Development Study' (2010)

The study identifies the principal tourism needs in the area as being:

- **To develop strong products** to attract the attention of the higher volume overseas sightseer and culture seeker market to Ireland and to encourage overnight stays by this market in the area. The strongest potential products are considered to be the Christian heritage of the area and the range of castles, historic houses and gardens.
- **To provide more access to water activities for visitors to the area, and develop activity visitor services around a set of activity hubs.**

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<sup>14</sup> Ibid page 51

<sup>15</sup> Ibid, page50-51

<sup>16</sup> Ibid, page 126

<sup>17</sup> Ibid, page 127

- **To develop more opportunities for visitors to experience trips on the waterway, including a regular waterbus service.**
- **To draw attention to the natural heritage of the area** and provide sustainable opportunities to appreciate the spectacular wetland bird assemblages and the natural and cultural heritage of Ireland's bogs.
- To draw attention to and interpret the special landscapes of the area through appropriate landscape designations and programmes (e.g. World Heritage Site status for Clonmacnoise and Special Amenity Area Order or a higher designation for Lough Ree)<sup>18</sup>

The study's main purpose was to recommend projects that could be developed sustainably in the area to **improve the tourism economy**.

The study outlines the current situation in Portrunny and opportunities for the settlement:

**Current Position:** *Waterways Ireland has recently completed a marina, playpark and visitor facilities at Portrunny to a high standard. The marina lies in an attractive bay and provides a quiet rural stopping point along the western shores of the lough. People arriving at the marina by boat will find no facilities for eating out, for entertainment or provisioning*

**Opportunities:** *Further visitor services including watersports activity or day boat hire could be provided to complement the marina at this point. This could be achieved by a rental units being constructed close to the marina. The development of a wider range of visitor services by the private sector could be encouraged, including café/restaurant provision and low rise, traditional design guest accommodation*<sup>19</sup>.

The study includes an action plan with a range of programmes designed 'to increase the visibility, appeal and ease of use of the area for visitors and to ease self and tour operator packaging of the best aspects of the area'<sup>20</sup>. Programme 3 in the study's action programme, as outlined in Table 1 below, identifies four locations for **activity hubs** with improved access to water based activities. Portrunny is identified as one of the four sites. **Recommended facilities** include changing facilities, equipment hire, day boat hire and instruction room, with the opportunity to pre-book activities.

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<sup>18</sup> Mid-Shannon and Lough Ree Project Development Study' (2010), page 1, authors emphasis

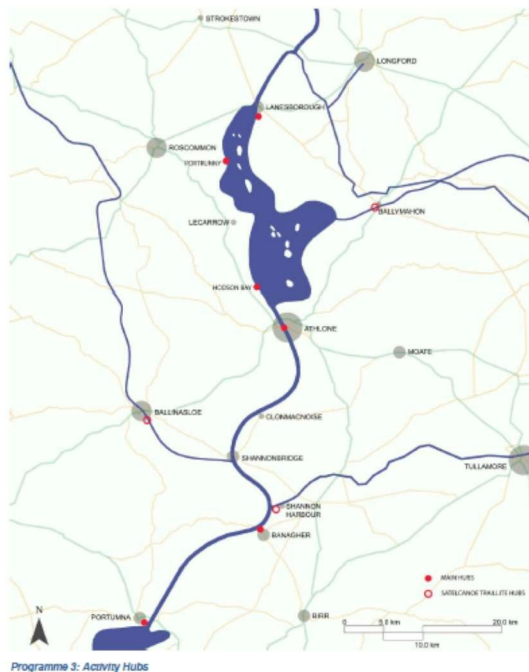
<sup>19</sup> Mid-Shannon and Lough Ree Project Development Study' (2010), page 19, authors emphasis

<sup>20</sup> Mid-Shannon and Lough Ree Project Development Study' (2010), page 37

**Table A2-1: Programme 3: Activity Hubs<sup>21</sup>**

Actions	Lead Agency
<p>1. To select and develop 4 locations as activity hubs where visitors can enjoy reliable daily access to a range of water activities.</p> <p>A model for an activity hub would include:                      Watersports/angling equipment hire and instruction base</p> <ul style="list-style-type: none"> <li>➤ Changing facilities</li> <li>➤ Day boat hire</li> <li>➤ Instruction room</li> <li>➤ A choice of activities</li> <li>➤ Water and activity specific safety advice and information</li> <li>➤ Accommodation close by</li> <li>➤ Eating opportunities close by</li> </ul> <p>Arrangements should allow for short notice booking and individual bookings to enable services to the touring market.                      Potential locations may include:</p> <ul style="list-style-type: none"> <li>➤ Portumna</li> <li>➤ Athlone</li> <li>➤ Banagher</li> <li>➤ Ballinasloe</li> <li>➤ Ballymahon</li> <li>➤ Shannon Harbour</li> <li>➤ <b>Portrunny</b></li> <li>➤ Hodson Bay</li> <li>➤ Lanesborough</li> <li>➤ Moate (land based activity)</li> </ul> <p>2. Opportunities to build hubs based on existing provision at Portumna, Banagher, Hodson Bay, or to extend club roles.</p> <p>3. To consider the feasibility of offering float trips on the River Shannon.</p>	<p>Fáilte Ireland, Waterways Ireland and LEADER group's engagement of private sector</p> <p>Private sector as main providers of activities.</p> <p>County Tourism Committees</p> <p>Clubs, Councils and Waterways Ireland                      Fáilte Ireland, Waterways Ireland</p>

**Figure A2-1: Activity Hubs<sup>22</sup>**



<sup>21</sup> Mid-Shannon and Lough Ree Project Development Study' (2010), page 40

<sup>22</sup> Mid-Shannon and Lough Ree Project Development Study' (2010), page 40

Programme 14 outlines Settlement Opportunities. For Portrunny this is envisaged as 'Provide shore side activity services, space accommodation and seasonal café<sup>23</sup>', with lead partners listed as Waterways Ireland and Roscommon County Council.

## A2.2 County Plans & Policies

### A2.2.1 Roscommon County Development Plan 2014-2020

The county development plan outlines Roscommon County Councils strategy for the county which aims to enhance the quality of life for residents of the county. Relevant several strategic aims, objectives and policies which relate to the study area are outlined in Appendix 2. Tourism is recognised as playing an increasingly important role in the economy of Roscommon, with Lough Ree and the Shannon system having opportunities to generate economic activity through water based activities.

The corresponding vision for tourism in the plan is that the county will capitalise on key natural resources such as Lough Ree and other waterways. The plan indicates the council's support for the development of facilities that, in appropriate locations, support the development of waterways based tourism, with Portrunny identified as one such place. However the plans indicates that any such development must not adversely affect the integrity of designated areas, with appropriate assessment required if deemed necessary.

Given that the PARC facility will provide recreational facilities of benefit to locals and visitors alike in tandem with the provision of community facilities, the plans policies with regard to community facilities are worth noting. This includes the recognition of the importance of the provision of community facilities in building community cohesion, and of the provision of recreation facilities as a means to enhance the health and quality of life of local communities, for which the plan indicates the councils support.

The County Development plan has several relevant policies which relate to the study area. Several strategic aims of the plan are detailed in the introductory chapter. Of these there are four which are of particular resonance for this project at this location, including:

**Strategic Aim 2:** *Improve the quality of life for the people of Roscommon and maintain the county as an attractive place to live, work and visit.*

**Strategic Aim 6:** *Promote the role of rural areas thus maximising their economic potential in areas such as agri –food, forestry, renewable energy and tourism.*

**Strategic Aim 7:** *Protect, within the context of planning legislation, the county's natural assets such as water resources, scenic areas, archaeological and cultural heritage.*

**Strategic Aim 8:** *Promote social inclusion, sustainable communities and sustainable travel.<sup>24</sup>*

The plan recognises that the Shannon waterway has the potential to 'generate a wide range of economic activity from both local and international sources through water based activities such as boating and water sports along with the general historic and cultural resource that this natural amenity has to offer'.<sup>25</sup>

## **Chapter 3: Economic Development**

The plan identifies the north of the county as having strong tourism potential which is seen as a key opportunity.<sup>26</sup> This includes opportunities for appropriate water based activity on and in the immediate environs of Lough Ree and the Shannon.<sup>27</sup>

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<sup>23</sup> Mid-Shannon and Lough Ree Project Development Study' (2010), page 49

<sup>24</sup> Roscommon County Development Plan 2014-2020, page 5

<sup>25</sup> Ibid, page 31

<sup>26</sup> Ibid page 41

<sup>27</sup> Ibid page 49



### 3.5: Tourism

While the plan acknowledges that tourism is relatively under-developed in the county, the strong role that natural resource-based tourism plays is identified, particularly waterways and special interest tourism such as inland cruising, angling and walking.<sup>28</sup>

Some key tourism issues are identified as a lack of investment; difficult access; and lack of national and international marketing and promotion of tourism in the county. Initiatives to address these issues are considered to include joint cooperation ventures in tourism resource areas. The plan states that *'The Council aims to facilitate tourism wherever possible, without compromising the environment or the natural and built heritage'*.<sup>29</sup>

One element of the stated **vision for tourism** in the county is to *'Capitalise upon key natural resources such as Lough Key, The Shannon and Suck and associated lakes and waterways'*.<sup>30</sup>

The plan indicates that the council will support: *'tourism development of appropriate scale within settlements on the Shannon Corridor and its calling points such as Cortober, Roosky, Termonbarry, Ballyleague/lanesborough, Hodson Bay, Shannonbridge, Lecarrow, Gailey, Portrun, Drumharlow, Battlebridge and Cootehall which focuses on the provision of tourist services for water based tourism. There is potential for angling, archaeology and tourism generally to be further developed along the River Shannon corridor'*.<sup>31</sup>

Relevant tourism policies include:

**Policy 3.63** Promote Roscommon as a cultural, heritage and eco-tourism destination in order to diversify the range of tourist facilities in the county. All tourist developments will be screened for Appropriate Assessment in accordance with Article 6(3) of the Habitats Directive.

**Policy 3.65** Support and facilitate the development of new tourism facilities and services throughout the county.

**Policy 3.68** Support tourism type development (e.g. tourist information services, the provision of leisure and activity facilities for tourists) of appropriate scale, including appropriate infrastructure and ancillary services throughout the county and particularly in the key towns of Roscommon Town, Castlerea, Boyle, Ballaghaderreen, Strokestown and Elphin as well as villages with significant tourism amenities such as Tulsk and Arigna.

**Policy 3.69** Support tourism development of appropriate scale within settlements on the Shannon Corridor and its calling points such as Cortober, Roosky, Termonbarry, Ballyleague/lanesborough Hodson Bay, Shannonbridge, Lecarrow, Gailey, Portrun, Drumharlow, Battlebridge and Cootehall, which focuses on the provision of tourist services (e.g. nature and heritage based activities) for water based tourism.

**Policy 3.77** Ensure that the facilitation of tourism and development related to tourism does not impact negatively on the landscape, environmental quality, built and natural heritage or otherwise result in the deterioration of the quality of the tourism product. The Council will also ensure all tourism related development is of a high standard of design and landscaping, with consideration given to the impact of the proposal on its surroundings in terms of scale and intensity.

**Policy 3.81** Work with agencies such as Fáilte Ireland, Coillte, Waterways Ireland, Inland Fisheries Ireland, the Department of Communications, Marine and Natural Resources, the

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<sup>28</sup> Ibid page 70

<sup>29</sup> Ibid page 70

<sup>30</sup> Ibid page 71

<sup>31</sup> Ibid page 72

National Parks and Wildlife Service, and the Office of Public Works in the development management and development planning processes.<sup>32</sup>

## **Chapter 7: Natural Heritage and Landscape Character Assessment**

### **7.1: Designated sites**

It is the strategic aim of the council to:

- *Protect, conserve and enhance the biodiversity and natural heritage of County Roscommon*
- *Identify, protect and conserve sites of natural heritage importance, in co-operation with the relevant statutory authorities.*

Lough Ree is designated as a Special Area of Conservation (SAC), Special Protection Area (SPA) and proposed Natural Heritage Area (pNHA), and the plan describes the level of protection which should be afforded to these areas:

**SAC:** *'Any development in, near or adversely affecting an SAC should avoid any significant adverse impact on the features for which the site has been designated or proposed for designation'.*

**SPA:** *'Any development in, near or adversely affecting an SPA should avoid any significant adverse impact on the integrity of the site'.*

**pNHA:** *'Any development in, near or adversely affecting a Natural Heritage Area should avoid any significant adverse impact on the features for which the site has been designated'.*<sup>33</sup>

The plan states that the planning authority must ensure any development proposal which is likely to have a significant effect on a designated area must only be authorised if the planning authority is satisfied that it will not adversely affect the integrity of the area. It is further stated that *'Such a proposal must be subject to an appropriate assessment of its implications for the area, if it is clear, on the basis of a preliminary examination, that the project could have a significant effect on the area.'*<sup>34</sup>

### **7.4: Inland Waterways**

There are eight inland waterways in County Roscommon, all connected to the Shannon Navigation. This section of the plan highlights the economic value of these waterways as tourism attractions with the potential to generate revenue, to enhance quality of life for locals and visitors, and to provide access to the waterways and their surroundings.

**Policy 7.7** *Have regard to the recommendations set out in the 'Waterways Corridor Study 2004 – A Study of the area surrounding Lanesborough to Shannonbridge', Waterways Corridor Study 2004 - The Shannon River between Roosky and Lanesborough' and the 'Waterways Corridor Study 2005 – A Study of the area surrounding the Upper Shannon navigation down to Roosky, including the Boyle River, Lough Allen, Lough Key and the Carnadoe waters'*

**Policy 7.8** *Safeguard and enhance riparian zones along waterways as well as canal towpaths where they occur in the interests of enhancing the public's interface and enjoyment of these natural amenities.*

### **Objectives for Inland Waterways**

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<sup>32</sup> Roscommon County Development Plan 2014-2020, page 73

<sup>33</sup> Roscommon County Development Plan 2014-2020, page 174

<sup>34</sup> Roscommon County Development Plan 2014-2020, page 177

**Objective 7.30** *Maintain and preserve the aesthetic value of inland waterways and the waterway corridors in the county from the impacts of dispersed and highly visible development.*

**Objective 7.31** *Support the growth and development of local communities within the inland waterway corridors whilst maintaining their distinctive character.*

**Objective 7.32** *Seek to enhance public access to inland waterways as a condition of any development granted along inland waterways.*

## **Chapter 8: Social, Community and Cultural Development**

This chapter of the plan notes recognises that community facilities are 'important for 'important for developing a sense of belonging within communities by providing opportunities for people to meet and greet, and get to know one another.'<sup>35</sup>

### **8.2: Community Facilities**

The plan notes that the council allocates funding for community facilities from the councils Development Contribution Scheme and has worked with various community organisations to provide community sports and recreational facilities.

**Policy 8.6** *Ensure the provision of necessary community services and facilities, including those required by young people and teenagers as well as older people and those with special needs, by zoning suitably located lands and ensuring that adequate development levies are raised and used to provide the required facilities.<sup>36</sup>*

### **8.6: Sports, Recreation and Open Space**

The plan outlines the importance of recreation facilities for enhancing the health and quality of life of communities, and indicates its support for the provision of such facilities.

**Policy 8.30** *Ensure the provision of necessary sports and recreational facilities as well as open space, particularly for young people, older adults and those who are disadvantaged or marginalised, by zoning suitably located lands and ensuring that adequate development levies are raised and used to provide the required facilities.*

**Policy 8.33** *Provide for the sports and recreational needs of the County by upgrading and maintaining existing facilities and providing for new facilities at appropriate locations as needed. All facilities should be designed with flexibility in mind so that they are multi-functional and ensure maximum usability by a variety of groups and members of local communities. Facilities should be widely accessible and appropriately located where they can best meet the needs of all sections of the community that they are intended to serve. The Council will work with community groups, sporting organisations and clubs to ensure the widespread availability of facilities.<sup>37</sup>*

**Policy 8.35** *Support the provision of facilities for young people and teenagers in the County including sports and recreation facilities, youth clubs and supervised places.*

**Objectives for Sports, Recreation and Open Space** include:

**Objective 8.3** *Work with community groups and local organisations to maximise funding for sporting and recreational facilities throughout County Roscommon.*

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<sup>35</sup> Roscommon County Development Plan 2014-2020, page 191

<sup>36</sup> Roscommon County Development Plan 2014-2020, page 204

<sup>37</sup> Roscommon County Development Plan 2014-2020, page 205

**Objective 8.4** Implement the Council's Development Contribution Scheme as it relates to the improvement of existing recreation and leisure facilities and the funding of new recreation and leisure facilities in tandem with new developments.<sup>38</sup>

#### A2.2.2 Roscommon Local Economic & Community Plan (2016-2021)

The proposed PARC development accords with the vision, high level goals and the wider actions and outputs outlined within the plan, particularly in relation to the provision of enhanced tourism, community, sport and recreation facilities and opportunities in County Roscommon.

Vision: The six-year Vision for the county, to be achieved by 2021, is set out as follows:

*'To ensure, through collaboration and the provision of strong leadership in partnership with the community, that County Roscommon is an attractive, inclusive, prosperous and vibrant place in which to live, work, invest, do business and to visit.'*

Seven high level goals:

- Build and support local communities and a strong sense of place,
- Increase economic activity, job creation and employment opportunities,
- Develop a Roscommon brand image and promote a positive identity for the county,
- Protect, enhance and maximise the value of Roscommon's natural, cultural and heritage resources,
- Provide, maintain and enhance strategic infrastructure that supports economic and community development,
- Support priority industry sectors to compete locally, regionally, nationally and internationally,
- Promote social inclusion by reducing poverty and alleviating disadvantage.

### A2.3 Local Plans & Policies

#### A2.3.1 Portrunny Tourism & Amenity Action Plan (2006)

This objectives of this plan, produced for Roscommon County Council, relate to:

- *Enhancing the role and function of Portrunny within the County - given its strategic proximity to Roscommon Town and location on Lough Ree;*
- *Accommodating residential, tourist and amenity-based development while protecting the unique heritage of the Portrunny area;*
- *Providing an enhanced range of amenity and recreational activities focussing on the natural heritage of the area within the management framework for the Lake set out in the cSAC site synopsis.*

To achieve these objectives this aspirational plan, typical of the era, sought:

- *The introduction of a public sewerage scheme and other physical infrastructure to service new developments;*
- *Integration of new development into the village through proper siting and design to ensure the natural and built environment is protected; and*
- *The integration of a new residential population with the existing population'<sup>39</sup>*

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<sup>38</sup> Roscommon County Development Plan 2014-2020, page 206

<sup>39</sup> Portrun Tourism & Amenity Action Plan (2006), CAAS for Roscommon County Council, page 7



Planning policies and development control criteria are detailed, to be applied to the future development of Portrunny Village. The development plan is based over two phases which are aligned with the implementation of a waste water treatment plant to service the area. In the first phase the plan envisaged new development consisting of 40 permanent residential houses, 60 holiday houses or equivalent in terms of a small hotel/tourist accommodation, amenity use such as restaurant or bar with capacity for 50 users/day & 10 staff, 7 new commercial/retail units.

The focus on tourism and amenity related development was allow for incremental provision of tourist related facilities. Provision of facilities in phase two was thought likely to include a primary school to allow for a population of up to 1,000. The precise mix of development was to be subject to a subsequent development plan.

A map outlining Development Objectives accompanied the plan. This map divides the area into three zones: Shoreside Lands, Village Growth Area, and **Lakeside Activity Area**. The lands identified for the PARC facility are located on the Lakeside Activity Area. The objective, specified, in the plan, for this area is to: *'Create new mixed use development which extends along the westward side of the road fronting the marina. The creation of a strong streetscape provides for focused development and the creation of a sense of place.'*<sup>40</sup>

**Specific policies** for this area included:

1. *Permit mixed use development at varying densities while ensuring that structures are sensitively sited so as not to break the localised ridge. Permitted uses to include:*

- *Residential development – of a high density within single or two storey terraces;*
- *Retail services;*
- *Tourist related development including guesthouses, small hotels, tourist information, etc.;*
- *Offices and other small-scale commercial enterprises.*

2. *Implement the design guidelines detailed in Section 4 over, to create an attractive and strong lakeshore edge.*

3. *Ensure that all development proposals are designed, planned and considered having regard to the impact of that proposal on the habitat of Lough Ree and adjacent lands and that appropriate mitigation measures are incorporated into any such proposals. Moreover, in considering all such applications, Roscommon County Council will have regard to the advice and recommendations of statutory consultees and relevant state agencies.*<sup>41</sup>

The plan details **design guidelines and streetscape considerations** for the three zones. For the Lakeside Activity Area it states: *'These lands are located on the western side of the main access road. Importantly these lands act as a buffer to the designated habitat of Lough Ree and are also themselves partially designated within the Lough Ree pNHA, cSAC and SPA. The designated lands consist of a narrow strip of land with open views to the lake. Critically, these plots are bisected (south-east to north-west) by a 40m contour which creates a localised ridge. It is proposed to create a strong streetscape containing a mixture of uses on this stretch of land leading from opposite the existing marina and playground, north-westwards to the access roads leading to Portrun Village.'*<sup>42</sup>

The role of tourism is emphasised again here stating that *'the Council will particularly encourage the development of appropriate tourist activities – such as those promoting the*

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<sup>40</sup> Ibid, page 13

<sup>41</sup> Ibid, page 13

<sup>42</sup> Ibid, page 14

*use of the lake shore as a key amenity – e.g. kayaking / boating clubs, etc. and will support the provision of such services by whatever means possible.*<sup>43</sup>

### A2.3.2 Portrunny Local Area Development Plan

Portrun Development Association intend to produce a Portrunny Local Development Plan. This non-statutory plan is intended to inform and guide development in the area from 2018-2020.

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<sup>43</sup> Ibid, page 16

## Appendix 3: Market Research

### A3.1 National Profile

#### A3.1.1 Overseas visitors

**There is strong growth in overseas visitors to Ireland, although with a recent decline in the UK market.** Revenue to the Irish economy from international visitors reached €6.6bn in 2016, a rise of 9.5% on 2015, on the back of a record year for volume growth with almost 8.74m visitors arriving by air and sea, a growth of 8.8% over 2015. The strongest growth was from visitors from North America (14.2%), followed by Britain (8.5%) and Mainland Europe (7.7%). The **largest source markets** for overseas visitors are Britain (41.5%), Mainland Europe (35.6%) and North America (16.9%). Other long haul accounted for 6.1% of the total.

#### A3.1.2 Domestic visitors

**Domestic tourism also shows an upward trend.** In 2016 there were 9.3m domestic trips taken by Irish residents within the Republic with an associated revenue of around €1.8bn. This was an increase of 1.7% on the number of trips taken in 2015 and an increase in expenditure of 2.8% - echoing the trend for growth of revenue in excess of volume shown by overseas visitor figures. The figure of 9.3m includes 4,830 on holiday trips (3,686m who were on a short (1-3 nights), 1,144 on a long (4+ nights) holiday); 3,032m visiting friends and relatives, 425,000 business trips and 994,000 on other trips.

The **most popular activities** engaged in while on holidays for domestic holidaymakers in 2014 was hiking/hillwalking (25%) followed by visiting houses/castles (24%), national parks (23%), visits to a spa (20%), heritage/interpretative centres (20%), gardens (19%), water-based activities (19%), monuments (18%), museums and art galleries (14%), cycling (8%), golf (6%), angling (3%), attending horse racing (3%).

### A3.2 Visitors to the West Region

For the purposes of collation of visitor data County Roscommon is located within the Fáilte Ireland's West region which also includes Galway and Mayo. The West region is the 2nd most popular region after Dublin, and the South-west. In 2016 the region attracted 1.675m overseas visitors generating €543m of revenue, and 1.591m domestic visitors generating €329m.

Fáilte Ireland's estimate of overseas visitor numbers and expenditure for the West region by market in 2016 are set out below in Table 2. This indicates over **43% of visitors came from Mainland Europe making it the largest market**; 28.6% of visitors came from North America, and 20.9% from the UK, with around 7% from other areas. Visitors from North America were responsible for a higher level of expenditure than visitors from the Mainland Europe (38.7% vs 35.2%), with 20.3% derived from visitors from the UK.

Table 3-1 shows the estimate of holidaymaker volume and revenue for County Roscommon in 2016. This indicates that while visitors from Mainland Europe are also the largest group of holiday makers they are also responsible for the highest proportion of revenue.

**Table 3-1: Overseas Tourists to West region (2016)**

	Overseas Visitors (000's)	Revenue (€m)	Market Share (%)	
			No's	€
Britain	350	110	20.9	20.3
Mainland Europe	733	191	43.7	35.2
North America	479	210	28.6	38.7
Other Areas	114	33	6.8	5.8
	<b>1676</b>	<b>543</b>	<b>100</b>	<b>100</b>

Source: Fáilte Ireland 2017

**Table 3-2: Overseas Holidaymakers to West region (2016)**

	Overseas Visitors (000's)	Revenue (€m)	Market Share (%)	
			No's	€
Britain	163	54	13.9	14.9
Mainland Europe	568	147	48.3	40.6
North America	373	137	31.7	37.9
Other Areas	71	24	6.1	6.6
	<b>1176</b>	<b>362</b>	<b>100</b>	<b>100</b>

Source: Fáilte Ireland 2017

### A3.3 Visitors to County Roscommon

Roscommon's overseas visitor numbers and associated revenue from 2013-2016 are shown in Table 3-3. The data indicates there has been a very significant growth in both visitor numbers (**up 67%**) and in visitor revenue (**up 65%**) over the 2013-2016 period, with growth slowing in 2016. This generally buoyant trend indicates potential for further growth could be considered very strong. In 2016 there were 137,000 domestic visitors to Roscommon and Longford with revenue of €17.6m, representing a significant decline over the 2015 data of 160,000 and €28.2m.

**Table 3-3: Overseas Visitor Numbers and Revenue 2013-2016**

	2013	2014	2015	2016
Roscommon Overseas Visitor No's (000's)	35	44	50	52
Roscommon Overseas Visitor Revenue (€m)	13	16	20	20

Source: Fáilte Ireland 2014-2017

Fáilte Ireland's estimate of overseas visitor numbers and expenditure for County Roscommon by market in 2016 are set out below in Table 3-4. This indicates that **the largest market, with around 48% of visitors, came from the UK**, with 26.9% from North America and 19.2% from Mainland Europe. Around 45% all visitor expenditure in County Roscommon was from visitors from the UK with 35% derived from visitors from North America and 15% from Mainland Europe. This indicates that County Roscommon is more exposed to the UK market than the wider West region and could be negatively impacted by any Brexit associated downturn.

**Table 3-4: Overseas Visitors to County Roscommon (2016)**

	Overseas Visitors (000's)	Revenue (€m)	Market Share (%)	
			No's	€
Britain	25	9	48.1	45
Mainland Europe	10	3	19.2	15
North America	14	7	26.9	35
Other Areas	3	2	5.8	10
	<b>52</b>	<b>20</b>	<b>100</b>	<b>100</b>

Source: Fáilte Ireland 2016

### A3.4 Target Markets

To maximise the visitor opportunity it will be important to consider who are the likely target markets by country and within these markets which are the type of visitors or market segments most likely to be interested in a visit to Portlunty. By identifying these market segments, and their motivations, the focus then becomes the provision of suitable facilities and infrastructure to attract these visitors and provide them with the optimum experience.

#### A4.4.1 International context

The four **main overseas markets**, which from which 70% of all overseas arrivals are derived are identified by Fáilte Ireland as Britain, USA, Germany and France.



Within these overseas markets, Tourism Ireland and Fáilte Ireland have identified **three target market segments** as having the most potential for the development of tourism in Ireland.<sup>44</sup> These segments, i.e. visitors grouped according to values & motivations, are **Culturally Curious, Great Escapers and Social Energisers**, described in further detail in Table 3-5 below.<sup>45</sup>

**Table 3-5: Overseas Core Target Market Segments**

<b>Culturally Curious</b> <i>Travellers with a passion for new 'wow' experiences who are seeking fun and excitement, immersing themselves in the destination</i>	<b>Great Escapers</b> <i>Independent thinkers with a craving for culture and history. They are out to broaden their minds and expand their experiences by exploring new landscapes, history and culture</i>	<b>Social Energisers</b> <i>Adventurous and committed to spending quality time in a breath-taking place. They are on holiday to take time out, get physical with nature and reconnect with their partner</i>
<ul style="list-style-type: none"> <li>• Tend to be middle aged (35 – 54)</li> <li>• Likely to travel as a couple or with other adult friends</li> <li>• Want to broaden their minds and expand their experiences through landscape, history and culture</li> <li>• Curious and keen to learn about the places that they travel to</li> <li>• Independent active sightseers</li> <li>• Want to encounter new places and out-of-the-ordinary experiences</li> </ul>	<ul style="list-style-type: none"> <li>• Tend to be younger (25 – 45)</li> <li>• Often couples, some with young children, or travelling with friends and older family members</li> <li>• Need time out from busy lives and careers</li> <li>• Specially interested in rural holidays</li> </ul>	<ul style="list-style-type: none"> <li>• The youngest target segment, primarily aged under 35</li> <li>• Like to holiday in groups or as couples</li> <li>• Look for places that are new, different, and vibrant</li> </ul>

Source: Fáilte Ireland

There are overlaps between segments and also variances in motivations, desired experiences they will purchase, and key booking channels they use. There are also variations by segment between the four key markets. The four overseas markets, identified as a priority for the Culturally Curious and Great Escapers segments, also match those visitor markets currently attracted to the West region and County Roscommon (see Table 3-5 above), i.e. Britain, North America (with the priority market being USA) and Mainland Europe (with the priority markets being Germany and France).

### Characteristics of Principal Overseas Markets for Ireland

The four main overseas markets, which from which 70% of all overseas arrivals are derived are identified by Fáilte Ireland as Britain, USA, Germany and France. The main characteristics of these four target markets are outlined in Table 3-6 below.

**Table 3-6: Characteristics of Principal Overseas Visitor Markets<sup>46</sup>**

<sup>44</sup> GB Path to Growth, 2011, page 5. The other four segments are the 'Top Tenner's', 'Easy Going Socialisers', 'Nature Lovers' and the 'Spoil Us' segment

<sup>45</sup> Fáilte Ireland, Growing International Sales, Global Segmentation Toolkit

<sup>46</sup> Fáilte Ireland, Growing International Sales, Global Segmentation Toolkit

	Great Britain	USA	Germany	France
<b>When do they visit Ireland?</b>	Visit all year 31% Jan-Apr 23% May-June 22% July-Aug 9% Sept 15% Oct-Dec	62% visit outside of July and August 17% Jan-Apr 29% May-June 29% July-Aug 11% Sept 13% Oct-Dec	73% visit outside of July and August 23% Jan-Apr 31% May-June 27% Jul-Aug 8% Sept 12% Oct-Dec	64% visit outside of July and August 22% Jan-Apr 26% May-June 36% July-Aug 6% Sept 9% Oct-Dec
<b>Where do they go in Ireland?</b>	Majority spend their time in one destination Short-breaks, less regional touring 53% Dublin 28% Southwest 19% West 11% Midwest	Most will visit more than one region Dublin is on the majority of itineraries followed by Western seaboard and Southwest 80% Dublin 48% Southwest 35% West 32% Midwest	41% like to tour around 24% visit Dublin only 65% Dublin 50% Southwest 33% West	Most will visit more than one region 6% Dublin 50% West 43% Southwest
<b>How long do they stay in Ireland?</b>	Average 5 nights Average annual leave 28 days	Average 6.8 nights (42% stay 6-8 nights) Average annual leave 12 days	Average 8.3 nights Average annual leave 29 days	Average 8.9 nights 13% short breaks (1-3 nights) Average annual leave 7.5 weeks, min. 5 weeks
<b>What accommodation do they use when in Ireland?</b>	33% hotels 13% rented 9% guesthouses/B&Bs 26% friends and relatives	50% hotels 25% B&Bs and guesthouses 7% rented 8% hostels	34% hotels 25% Guesthouses/B&Bs 10% rented	23% guesthouses and B&Bs 20% hotels 13% rented
<b>Where are they from?</b>	21% South East 15% London 11% South West 11% North West 10% West Midlands 8% Scotland 8% Wales	New York, California, Massachusetts, Florida and Illinois	Bavaria Baden-Wurtemberg, Nord Rhein/Westphalia Rheinland-Palatinate and Hessen	33% from Paris 20% from Western France 14% South East 12% South West 11% Mediterranean 6% East 3% North
<b>What age are they?</b>	A greater portion over 35s 48% are over 45 Mostly couples and a quarter in	Slightly older than European visitors, 25% are over 55	22% are under 24 24% are 25-34 16% are 35-44 38% are over 45 39% couple	Younger than other markets; just 27% are over 45

	Great Britain	USA	Germany	France
	other adult groups Less child or family focussed	44% are over 45 Almost half visit as part of a couple	12% family 23% with other adults	36% couple 25% family (more than twice the number of Germans who travel with family) 19% with other adults
<b>How do they get here?</b>	8 out of 10 air 2 out of 10 hire a car 2 out of 10 bring their car	99% air 46% hire a car	75% air 25% by sea 32% hire a car 23% bring their car	80% air 20% sea 18% bring their car 37% hire a car
<b>Have they visited Ireland before?</b>	59% previously visited Visiting friends and relations (VFR) is big from the GB market	75% are on first visit	65% are on first visit 25% are repeat visitors	65% are on first visit
<b>Will they return to Ireland?</b>	76% will return	50% will return	54% will return	50% will return
<b>Is the language important to them?</b>	N/A	N/A	Very important if attending consumer shows in Germany Many like to do their holiday research and planning in their own language, so knowledge of the language is a definite advantage	Being able to speak French is important both for consumer and trade engagement

#### 4.4.2 Domestic Context

As indicated above, in section 3-6, domestic tourism within the island of Ireland is growing. Fáilte Ireland have developed a segmentation model for this market to help drive further growth.

- **Connected Families** - made up of families with young children. Their core motivation is to spend quality time together and grow as a family
- **Footloose Socialisers** - tend to travel as groups of friends, for them holidays are about sharing experiences with people who are of the same mind-set
- **Indulgent Romantics** - made up of couples that are seeking a romantic getaway through which they can reconnect while enjoying wonderful surroundings

#### Characteristics of Priority Domestic Market Segments

Fáilte Ireland have identified three priority segments for domestic tourism as: Connected Families, Footloose Socialisers, and Indulgent Romantics. Table A3-7 below summarises some of the key characteristics of these three domestic segments.

**Table A3-7: Characteristics of Priority Domestic Market Segments<sup>47</sup>**

	<b>Connected Families</b>	<b>Footloose Socialisers</b>	<b>Indulgent Romantics</b>
<b>Who are they?</b>	<p>Connected Families make up 23 percent of the domestic market, the single largest segment.</p> <p>They are made up of relatively young families. They are made up of parents in their thirties and early forties and children generally under the age of ten.</p> <p>For Connected Families, family holidays are the best weeks of the year and a special opportunity to spend quality time together, creating memories to last a lifetime.</p> <p>They put their heart into planning and finding out everything a destination has to offer, the best places to stay, the hidden gems and all the activities available that can be shared by adults and children together.</p> <p>For them it is not about having a plan for every day rather knowing that there are lots of 'things to do together' nearby and making sure their accommodation and facilities really suit their needs.</p>	<p>Footloose Socialisers make up 15 percent of the domestic market. On average in their late forties and well educated, they are made up of groups of friends that enjoy getting away and spending quality time together.</p> <p>What matters most to them is being with like-minded people, whether they're old friends or new acquaintances.</p> <p>They really love the opportunity to get a break from their routines and responsibilities.</p> <p>For Footloose Socialisers a weekend with friends is a reminder of their long lost youth and they love to break out, really relax and enjoy themselves.</p> <p>Although value conscious, Footloose Socialisers regularly take short breaks with friends - going to rugby matches, hill walking, attending music and cultural festivals or just playing a few rounds of golf.</p>	<p>Indulgent Romantics make up 14 percent of the domestic market. Although relatively broad in terms of age profile they are more likely than average to be aged between 45 and 64.</p> <p>They are interested in going to different places and enjoy the atmosphere of new cities, particularly if they offer opportunities for shopping, pampering, enjoying great food and the little indulgences in life.</p> <p>They enjoy quick and spontaneous weekend breaks to get away from the stresses and bustle of their daily lives.</p> <p>Savvy trip planners they are always keen to find a good deal for a particularly nice hotel they've had their eye on. Interested and knowledgeable about quality travel, restaurants, food and wine, they tend to be in-the-know about what's hot and what's not.</p>
<b>What they want from a holiday</b>	<p>Connected Families enjoy a holiday that offers a variety of things</p>	<p>Footloose Socialisers are seeking to share experiences with</p>	<p>They are made up of couples whose ultimate goal is to find</p>

<sup>47</sup> Fáilte Ireland, Driving Growth Through Segmentation

	<p>to see and do in a place that feels special.</p> <p>Whether it's fun at a petting farm, picnicking, learning to surf, catching crabs on the beach or taking a walk on a local nature trail, as long as they're doing it together, they're happy.</p> <p>For the parents it's all about their children being happy and enjoying themselves.</p> <p>They want to make the most of the opportunity to really 'be' with their children and love to see them do and enjoy the same simple things they did when they were children themselves.</p> <p>They are seeking to create special memories that they can treasure, sharing experiences that they can fondly look back on in the months and years to come.</p>	<p>people they can relax and be themselves with – experiences that bring people together and enrich life. They want to do this in authentic and interesting surroundings.</p> <p>They reject the idea of a package holiday.</p> <p>They believe that it's good to go off the beaten track every now and again, try out different places, meet the locals and really get under the skin of a place.</p> <p>They enjoy good food and drink and tend to be interested in the history and culture of the place they are visiting.</p>	<p>the perfect romantic hub for their holiday where they can soak up the luxury, reward themselves, be well looked after and reconnect with one another. Just being together and treating themselves a little really helps them to rebalance.</p> <p>They prefer to spend money on accommodation rather than activities and expect a certain standard of comfort in their accommodation and hospitality</p>
<p><b>Holiday behaviour</b></p>	<p>Connected Families tend to plan and book their holidays well in advance (3-6 months) and do most of their booking online. On average family breaks tend to last between four and seven days and they are most likely to stay in hotels or holiday homes.</p> <p>They tend to rely heavily on hotel/accommodations websites, review websites, social media and personal recommendations when deciding on</p>	<p>Footloose Socialisers tend to book their breaks closer to actually taking them, with one in three trips booked less than a month in advance.</p> <p>They do most of their booking online. On average their breaks tend to be for between one to three days and they demonstrate a stronger tendency to stay in holiday homes/rentals than other segments, although they are</p>	<p>Indulgent Romantics are more likely than any other segment to book their accommodation well in advance; however they do also act spontaneously and may book at short notice if the right offer comes up.</p> <p>They do most of their booking online. On average their breaks tend to be for between one to three days and they demonstrate very high propensity to stay in hotels.</p>



	<p>where to holiday and their choice of accommodation.</p> <p>After their return, they try to hold on to those special holiday memories for as long as possible, by sharing stories and photos with friends and family on social networks.</p>	<p>also likely to stay in hotels.</p> <p>They tend to rely heavily on review websites and booking agent sites (OTAs) and personal recommendations when deciding on where to holiday and their choice of accommodation.</p> <p>As active users of social media they share stories and pictures from their breaks online.</p>	<p>They tend to rely heavily on hotel and booking agent sites (OTAs) when deciding on where to holiday and their choice of accommodation (using a relatively narrow range of information sources when compared to other segments).</p> <p>Although they actively research and review destinations and accommodation online they are not active users of social media.</p>
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