

# COASTAL PASSENGER BOAT AUDIT

---

Summary Report

August 2020



## Contents

<b>01</b>	Introduction	3
<b>02</b>	The Visitor	5
<b>03</b>	Good Practice	8
<b>04</b>	External Factors	11
<b>05</b>	Coastal Boat Operators	13
<b>06</b>	Marine Infrastructure	17
<b>07</b>	Offering and Opportunities by County	20
<b>08</b>	Way Forward	25







# 01

## Introduction



# Introduction

Outdoor Recreation NI (ORNI) was commissioned in January 2020 by Fáilte Ireland to carry out an Audit for Coastal Passenger Boats.

## Vision

Fáilte Ireland's vision is for Ireland to be recognised internationally as a world-class, year-round activity destination. The Innovation Screener research commissioned by Fáilte Ireland clearly identified the appeal of visitor experiences that provide opportunities for on and close to water experiences.

Furthermore, 'on-water experiences' have been identified as an innovation platform. 'Innovation platforms' are product themes that have the greatest potential to grow tourism in Ireland and support Fáilte Ireland's strategic imperative of building brilliant visitor experiences.

## Objective

The primary objective of the audit was to identify new on-water visitor experiences that will unlock new opportunities for Ireland. The outcomes were to identify current gaps and obstacles which prevented world class on water experiences and, should funding become available in relevant departments/public agencies, how those areas could be supported and improved.

The project team was tasked to:

- » conduct an audit of the current on-water coastal product
- » conduct an experience audit of the on-water coastal product
- » review international best practice, including details on boat licensing, potential sources of funding, capital costs for boat purchase, operating models, visitor experience and economic impact.
- » research the Irish market, including barriers to entry, displacement challenges, boat licensing models in Ireland, potential sources of funding (capital and current) for boats and boat operators in Ireland and on-land support required
- » identify up to 20 potential locations to develop 'best in class' coastal boat trip experiences

## Project Scope

The scope of the project extended to passenger vessels in coastal areas in the Republic of Ireland. It was recognised that any support for the sector would not apply to the subsidised ferry services between the islands and the mainland, however these were included in the study as it is recognised that many visitors use these as well as the local community.

## Methodology

The study was carried out during the lockdown period of the COVID-19 pandemic (March to June 2020). As a result, the planned fieldwork did not take place and instead was supplemented with more extensive one-to-one telephone consultation. The primary actions are listed below:

- » one-to-one in-depth consultations with 22 passenger boat operators; 37 marine infrastructure consultees including CEOs of port companies, local authorities and harbour masters; 9 operators in Scotland and Norway
- » online survey (via SurveyMonkey) to all boat operators and desk research on the boat operators currently operating in Ireland
- » creation of GIS maps illustrating routes
- » desk research and one-to-one research with all relevant marine organisations (including Marine Survey Office, Department of Agriculture, Food and the Marine, FLAG, Bord Iascaigh

Mhara) to help understand the Marine Regulatory Framework and other marine-specific factors

- » review of the UK regulatory framework
- » review of funding available to the sector

The recommendations have been formulated in the fast-changing tourism environment and are cognisant of the changing priorities of Fáilte Ireland.

## Report

This report summarises the key findings and recommendations of the audit.







# 02

## The Visitor



# The Visitor

Whilst there is no primary research available on the current coastal passenger boat market, a number of sources including Failte Ireland's 'Innovation Screener' provides valuable insights into the visitor.

## Innovation Screener

The 'Innovation Screener' online research, commissioned by Failte Ireland, tested 141 tourism experiences in both the overseas and domestic markets. The results of the boat-related experiences are illustrated in the table. The five coastal passenger boat experiences tested very positively and ranked in the top 26 experiences. Some notable insights included:

- » 2 hours duration is adequate; 3 or 4 hours is suitable only for niche trips such as wildlife watching
- » Natural landscapes are the primary attractor
- » Visitors want to have an experience when they land on an island

The water-based activity experience in Dublin ranked 76 but this is likely due to its positioning as an 'adrenalin' experience which only has niche appeal.

Experiences	Description	Rank	Consid. Index	Feedback	
				Out of 141	Average 25
Aran Islands	10-minute flight or 1-hour boat trip	#12	31.8	Spectacular cliffs & ancient fort Effort-return ratio	✓ ✗
Sliabh Liag Cliffs	2-hour boat tour	#16	31.1	Europe's highest sea cliffs 2 hours is too long	✓ ✗
Wildlife Watching	4-hour boat trip	#17	30.8	Encounter with marine life 4 hours is too long	✓ ✗
Skellig Michael	Boat trip around; lucky few can go ashore	#23	29.9	Beautiful seascapes & history Overcrowding	✓ ✗
Blasket Islands	20-minute boat trip to deserted island	#26	29.2	Peig Sayers; natural beauty Weather; nothing to do	✓ ✗
Dublin Water Quarter	Adrenaline activities or motorcruise on bay	#76	23.1	Proximity to city Watersports have niche appeal	✓ ✗

Innovation Screener





# The Visitor

## Visitor Profile

The Innovation Screener research demonstrated that boat trips have very strong appeal. Of the five boat experience concepts tested, all ranked within the top 26 out of the 141 experiences tested.

However the Innovation Screener research did note that there were variations by origin of visitors. For some GB and US visitors, time is an important factor and this needs to be considered when developing and marketing boat experiences.

- » US – want to cram ‘all of Ireland’ into one visit; boat trip can be too time consuming
- » GB – take short trips to Ireland, therefore less time available for boat trips
- » Germany and France – are driven by landscape, and secondly history

Not all boat trips have broad appeal. Some provide niche experiences:

- » ‘specific destination’ – eg screen tourists on Skelligs
- » ‘adventure seeker’ – getting wet in boat

Most visitors are independent visitors but day-trip coach tours from Dublin and Galway are an important source of visitors for some of the larger boat trips such as trips from Doolin around the Cliffs of Moher.

## Market Size

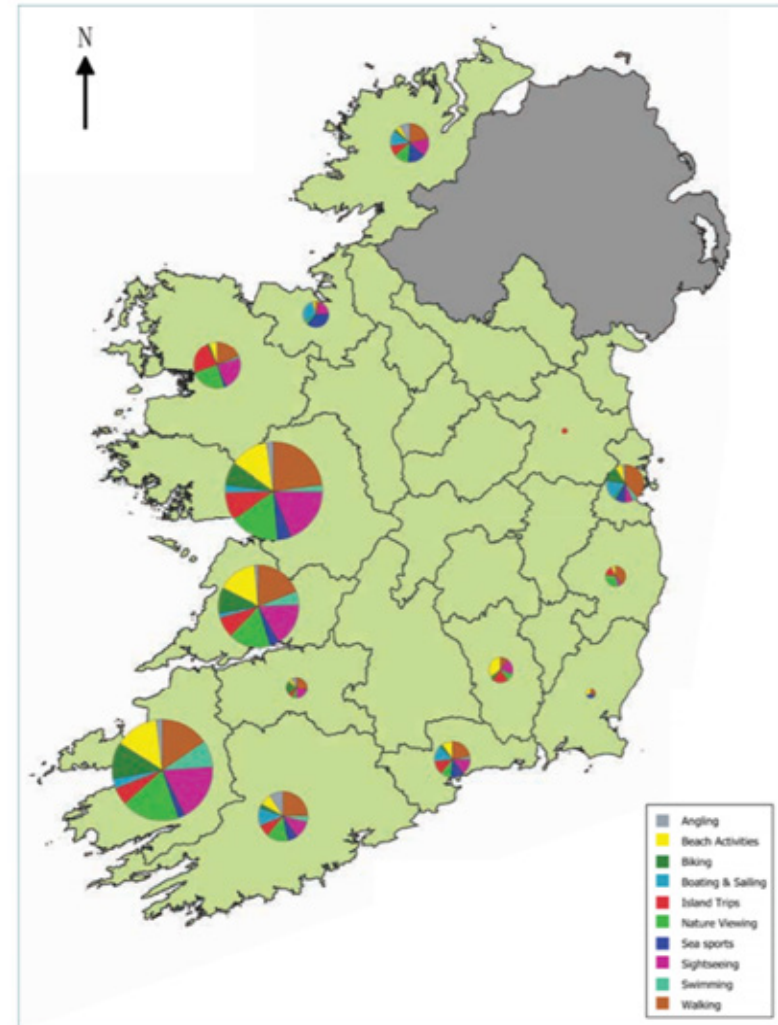
There is no market size data available for boat trips in Ireland, however NUI Galway carried out research on overseas visitors doing coastal and marine related activities which gives an insight into the comparative size. The chart gives a visual representation of the regional spread of coastal and marine related activity by county.

As expected, Kerry, Galway and Clare have the most visitors doing these activities – indicated by the size of the pie chart on map. Activity was lower in other counties and particularly low on the east coast. This primarily reflects the fact that the coastline is less conducive to boat trips in the east as the coastline is flat and often unremarkable as well as having a lower density of visitors.

## Conclusion

Coastal passenger boat experiences test very positively with visitors and have broad appeal.

Source: A Survey of Marine and Coastal Overseas Tourism Activity in Ireland, NUI Galway, 2018 (includes additional activities such as angling)





# 03

---

## Good Practice





# Good Practice

The case studies selected for analysis focussed on themes relevant to Irish sea conditions and Irish boat operators. Other case studies were discounted which were felt to be irrelevant to Irish sea conditions (such as glass-bottomed).

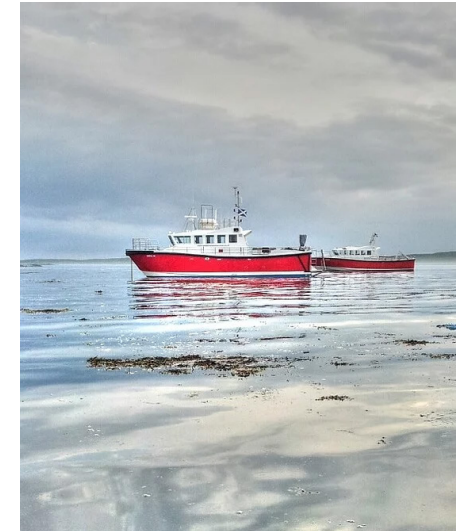
Theme	Case Study
Vessels - Seakeeping	Kilda Cruises, Scotland
Vessels - Accessibility	Kerry Aqua Terra - Ireland
Sustainability	Country Overview - Norway Vessel Specific - Brim Explorer
Strategic Framework	Scotland - Marine Tourism Strategy
Unique Experiences	Multi-day exclusive cruising - Scotland

This chapter assesses how the learnings from these case studies can be applied to the development of the coastal boating industry in Ireland.

## Vessels - Seakeeping

Demand for boat trips focusses on the most dramatic sections of coastline with the greatest visual appeal, predominantly the 'Wild Atlantic Way'. To develop the coastal boat offer in Ireland, minimising the impact of rough seas on the visitor experience is key.

Kilda Cruises in Scotland provides a standout example of a comfortable, safe and fast boat to transport visitors across very rough waters. Development of the coastal boat experience around Ireland will need to increase the provision of safe and comfortable vessels to enhance visitor experience in frequently rough waters around the Wild Atlantic Way.



Kilda Cruises Vessel

## Vessels - Accessibility

Consultation identified potential locations for landing that currently are not achievable as they are deemed inaccessible in Ireland. Kerry Aqua Terra designed and built a new vessel that enables flexibility. The Vessel commissioned is capable of landing on beaches and is not constrained by infrastructure requirements. They have consequently been able to develop niche boat trips to 'undiscovered' areas in County Kerry.

The potential exists to develop similar experiences based on this vessel type in currently inaccessible areas of Donegal, Galway and Mayo.



Kerry Aqua Terra Vessel - "The Navigator"



# Good Practice

## Sustainability

A Norwegian boat operator launched a silent hybrid electric 24-metre catamaran “Brim Explorer” for sightseeing in response to Norway’s ambitious marine carbon emissions’ policy.

The energy efficient vessel offers tourists sustainable and spectacular cruises in the arctic including whale watching and northern light’s trips. On the Brim Explorer whale watching is a silent experience and pods are more likely to swim alongside the vessel -underwater drones relay visuals to on-board screens, and vast viewing platforms allow direct viewing from above. The modernity and design of the vessel means that the boat becomes an attraction in its own right.



Brim Explorer Electric Sightseeing Vessel

## Scotland’s Strategic Framework

This case study takes a countrywide approach to supporting the marine tourism sector, through consideration of Scotland’s publication ‘A Strategic Framework: Awakening the Giant’ developed in 2015.

As a result of the strategy, local Scottish operators have been able to benefit from greater provision of business development training, in many areas adapted specifically to the context of coastal boating.

## Unique Experiences

Whilst still relatively small, the significant growth in multi-day, small-vessel cruising in Scotland demonstrates the potential for the Irish market. Boats provide comfortable on-board accommodation often with a maximum of 12 passengers offering itineraries from 5 days to 14 days.

These small family-run operations in Scotland pride themselves on delivering quality authentic experiences. On-board there is a focus on fresh local artisan produce on an all-inclusive basis and vessels carry kayaks and bikes for complementary activities during stopovers.



Multi-Day Vessel: Gemini Explorer





# 04

---

## External Factors

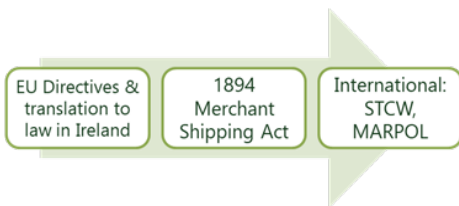




# External Factors

## The Regulatory Framework in Ireland

The regulatory framework for passenger coastal boats going to sea is complex. The Marine Survey Office (MSO) is the maritime transport regulator and employs three types of instruments to regulate the sector in Ireland.



The licencing of vessels also has a significant impact on the sector. A vessel carrying up to 12 passengers requires a 'Passenger Boat Licence', whilst a vessel carrying 13 passengers or more requires a 'Passenger Ship Certificate'. A significant difference exists between the requirements of a Boat Licence and Ship Certificate deterring many operators operating a vessel of 13 or more passengers.

The marine regulations relating to coastal passenger boats in Ireland are more onerous than many other EU countries and the UK. For example, the Master of a passenger ship of over 100 passengers must hold the highest grade of seafarer qualification, however in the UK this is not the case up to 250 passengers.

There are two primary options that could be considered to increase the offering of boat experiences for more than 12 passengers:

- » Change in regulations

Seek to influence a change in regulations by liaising with the Department of Agriculture, Food and the Marine.

- » Subvention

Circumvent the issues arising through financial grants awarded to operators such as subsidies for purchase of a new ship or financial support with acquiring and renewing MSO annual licences.

## Funding

Coastal boat operators are currently able to access four primary grant programmes:

- » Bord Iascaigh Mhara (BIM) helps to develop the Irish Marine Industry by providing technical expertise, business support, funding, training and promoting responsible environmental practice
- » Fisheries Local Action Groups (FLAGs) distribute grant aid under the European Maritime and Fisheries Fund Operational Programme 2014 -2020. As part of the programme second-hand vessels are not eligible but new vessel purchase and vessel

upgrade is eligible. A successful application was made to FLAG for the Kerry Aqua Terra vessel. Another 5-year FLAG programme will launch in 2021

- » LEADER can support the sector particularly for marine diversification. An example of a marine tourism recipient from LEADER is boat improvement works to Donegal based vessel Bád Gráinne (grant of €36,000)
- » Tourism Destination Small Grant Schemes have on occasion provided support to coastal boat operators.

Whilst a number of these schemes have been availed of by many coastal boat operators, the financial support for the purchase and upgrade of vessels has been limited and subject to delays, additional costs and difficulties. This is due to the grant schemes not being set up to accommodate the complexity of purchasing or upgrading a vessel and the financing of same.

Grant aid to support vessel purchase can be fraught with issues around funding a moveable asset. However, the enforcement of a marine mortgage for the vessel means that grant aid can be written off against the mortgage after a period. This protects against change of ownership, change of use and change of location.

Any future grants programme should complement the existing sources of funding and options should be explored how the good practice and experience of FLAG could be employed. The development of a scheme for vessel purchase should be set up with the support of a marine regulations expert who can advise on requirements, timeframes and obstacles.



Louth Adventure Vessel - 'Brienne'







# 05

---

Coastal Boat  
Operators



# Coastal Boat Operators

## Characteristics of Boat Operators

An audit of all coastal boat operators was undertaken.

The table gives an overview of the characteristics and experiences of coastal boat operators by vessel size.

Vessel Size	Overview
<b>Small &lt;12 passengers</b>	<ul style="list-style-type: none"> <li>» Majority of licensed coastal passenger boat trips take place on small boats</li> <li>» Many operators have multiple small vessels</li> <li>» Includes charter market - visitor numbers too low to warrant regular scheduled trips</li> <li>» Some landing opportunities restricted to smaller craft e.g. Skellig Islands</li> <li>» Small vessels have less reliance on infrastructure provision than larger vessels</li> </ul>
<b>Medium 13-99 passengers</b>	<ul style="list-style-type: none"> <li>» Operators of medium vessels tend to limit licenses to one or two vessels</li> <li>» Suitable for those constrained by tide times but have demand for higher numbers</li> <li>» Greater operational costs mean limited operators at this scale</li> </ul>
<b>Large 100+ passengers</b>	<ul style="list-style-type: none"> <li>» A limited number of large commercial operators focussing on areas of high demand</li> <li>» Some operate multiple vessel fleets e.g. Doolin to Cliffs of Moher and Aran Islands</li> <li>» Competitive and high-risk, high-cost operations</li> </ul>
<b>Ferry Provision</b>	<ul style="list-style-type: none"> <li>» All inhabited islands serviced by subsidised ferry provision, in addition to some private operators.</li> <li>» Visitor numbers currently being met to these areas by the combination of these services</li> </ul>

Overview of boat operators by size of vessel

## Operator Skillset

Operators are generally highly competent at sea, the majority having come from multi-generational seafaring backgrounds. Boats have been modified to acquire a license as a passenger carrying boat, to enable diversification to gain an additional, or new primary, source of income. The business skills including marketing of coastal boat trips varies enormously between operators.

## Visitor Experience

Coastal passenger boat trips can broadly be categorised by experience type.

### Sightseeing Tours

Most coastal boat operators offer a sightseeing tour. The majority stay close to shore and focus on geographic and topographical highlights, for example the Sliabh Liag Cliffs in County Donegal and the Cliffs of Moher in County Clare.

### Island Landing Trips

Whilst most inhabited islands are serviced by a scheduled ferry that caters for both inhabitants and visitors, there are several uninhabited islands around the coast of Ireland that can be visited by coastal boat trip such as Blasket Islands and Skellig Michael in County Kerry.

Landing trips to Skellig Michael are limited to small boats with a maximum capacity of 12 and only 15 boats are granted landing licenses by OPW for a duration of 4 years. OPW has no plans to increase landing capacity on the island.

The Skellig Islands' popularity has increased dramatically in recent years with additional visitor demand being met through the provision of circumnavigating eco-tours. Sea conditions in this area are rough and changeable, and the operation of smaller vessels allows boats to be filled at short notice, and multiple eco-trips to operate in any one day. Whilst there is potential for a larger boat to operate an eco-tour, vessel acquisition costs and ongoing operating costs prohibitive to the majority of current operators within this area.

### Wildlife Tours

Multiple operators either specialise in wildlife tours or offer a wildlife tour as an option from a wider portfolio of trips. Specialist tours include whale watching and dolphin watching trips. The visitor demographic for these trips is niche.

### Island Ferry Provision

The inhabited islands of Donegal, Mayo, Galway, Kerry and Cork are serviced by a combination of subsidised and private ferry operators. Many visitors would use these scheduled services in order to access the islands for tourism, negating the requirement for additional coastal boat trips.



Doolin Ferry Company





## Quality of Experience

Audited research is limited and for the purposes of this audit, the quality of the visitor experience was assessed through TripAdvisor, Google and Facebook reviews. The audit reviewed a host of elements of importance to visitors including ease of booking; comfort and facilities on-board; on-board interpretation; authenticity of trip / unique experience; value for money; experience at sea.

Whilst feedback varies from operator to operator, overall, the majority of trips reviewed receive above average feedback and reference good visitor experience, in particular great authentic Irish storytelling on board many vessels.

## Critical Success Factors

Based on this audit of the visitor experience plus the visitor insights a list of the critical success factors relating to the visitor experience has been developed. Each of the factors has been allocated a score out of 10 based on how important the factor is to visitors. An assessment of how the boat trips in Ireland are currently performing on these factors has been given a 'current rating' out of 10, based on the author's evaluation.

Based on the available evidence, boat trips in Ireland are currently performing well on the factors critical to visitors. However, it must be noted that there is a huge variation on how different operators perform on many of the factors.

Location/Landscape	Importance	Current Rating
<b>Natural beauty of the coastline:</b> can be the key attractor. With inclement conditions and often rough seas the visual experience must outweigh any discomfort.	9	9
<b>'Sights':</b> Points of interest, a change in landscape, or an opportunity to land provides a highlight for the customer.  The coastline of the Wild Atlantic Way scores highly on both factors above whereas the East Coast offers little dramatic appeal. This is reflected in visitor numbers and demand.	7	8
<b>On-Board Experience</b>		
<b>Smooth sailing:</b> Whilst acknowledgement is given to conditions being 'out of an operator's hands', an operators ability to minimise the effect of rough seas is critical.	9	8
<b>Journey duration:</b> Under 2 hours total journey time is a critical preference for the mass market.	8	8
<b>On-board interpretation:</b> Written or audio guides to provide information and set the journey in context are of low to medium importance.	6	4
<b>Staff engagement with passengers:</b> Interaction with crew is highly important to coastal boat customers with many highlighting the importance of a friendly and reassuring crew.	9	8
<b>Provision of catering facilities:</b> Catering facilities are generally provided on medium to large sized boats only, which make up the minority of vessels operating in Irish waters. Catering facilities are not considered of high importance.	5	5
<b>Covered area on boat:</b> The vast majority of boats provide covered space, which is very important to customers. Uncovered boats generally operate in sheltered waters and close to shore.	9	8
<b>Pre-Trip Experience</b>		
<b>Straightforward booking experience:</b> Clarity of information on trip times, durations, what to expect, safety and vessel information etc. is important Current provision varies from operator to operator but is generally adequate to good.	7	7
<b>Ease of booking last-minute:</b> many customers book a trip less than 24 hours in advance to ensure best likelihood of good weather.	8	6
<b>Infrastructure and Facilities</b>		
<b>Ease of access to embark and disembark:</b> Ease of movement on to and off the boat at point of departure and at destinations is critical for customer enjoyment.	9	8
<b>Covered location to wait:</b> provision of a covered waiting facility is of medium importance, however provision is often limited and does not impact too negatively on feedback.	7	6

Critical success factors - visitor experience



# Coastal Boat Operators

## Business Model

The commercial success of the coastal boat operators is affected by three important factors.

### Seasonality

The majority of operators run coastal boat trips on a seasonal basis, with dates varying dependent on location and sea conditions. Most open bookings take place between mid-March through to early October. June to September are classified as 'high season' with July and August receiving the greatest number of visitors.

### Cancellations

One of the greatest challenges is inclement weather resulting in trip cancellations and loss of business, estimated at an average of 26 days per annum. Geographical location determines the impact of weather on a business, with operators on the West and South-West coast being impacted heavily whilst operators such as Killary Fjord Cruises and Scattery Island Tours operate in relatively sheltered waters so are less impacted by weather.

### High Cost Base

Aside from initial boat purchase and modifications, numerous annual costs are incurred to keep a business operational, including licence and harbour dues; crane lifts; life craft rental; crew qualifications and fuel.

## Barriers to Entry

There are several barriers to entry for potential new market entrants. Vessel acquisition is the primary barrier.

### Second-hand Boat Acquisition

There is a very limited market of second-hand vessels in Ireland with most acquisitions being made in the United Kingdom. With no guarantee of a vessel being granted license to operate in Irish waters this is a high-risk strategy, and modifications to bring a vessel in line with Irish regulations can be costly. Also capital investment required is high and most grant aid schemes do not support second-hand purchase. Costs vary enormously from approximately €100,000 to €750,000.

### New Boat Acquisition

Prohibitive cost and lack of access to capital are the greatest challenges in new vessel acquisition. Costs for purchasing different types of boat varies enormously, but typically starts at approximately €1m with a lead time of over 1 year.

## Way Forward

There are several key areas where coastal boat operators require support. Given the substantial variation in the offering and the level of skill, it is proposed that this would take a targeted approach across the sector.

### Funding

Consideration should be given by relevant Departments and public bodies to the creation of a grants programme that would specifically support the purchase or upgrade of vessels in the coastal passenger boat sector.

### Training and Mentoring

For many, with experience lying predominantly at sea, business skills such as marketing are variable. Support to many boat operators (such as training or mentoring) would be beneficial.



Cork Whale Watch Experience Vessel 'Holly Jo'



Boats around The Skellig Islands







# 06

---

## Marine Infrastructure



# Marine Infrastructure

There are hundreds of harbours around the coast of the Republic of Ireland. Over 100 harbours were identified as being used for passenger coastal boat trips and were audited for this study.

The key findings and emerging themes from the audit are outlined. Specific opportunities for individual harbours are identified by county later in the report.

## Choice of Harbour

Coastal boat operators choose to operate or not from a particular harbour depending on:

- » the location of the harbour eg located in a tourism area with potential demand for boat trips
- » marine infrastructure eg. pontoon with capacity
- » marine conditions eg. ability to go to sea at all times of the day without tide or other marine restrictions

## Ownership

The majority of harbours and the associated marine infrastructure are in the ownership of local councils.

Harbour ownership is important as it can determine the propensity to support passenger coastal boat operators at these locations as well as the sources of funding available for any development or maintenance.

Organisation	Responsibility	Impact of Ownership on Passenger Coastal Boats
<b>Department of Agriculture, Food &amp; Marine</b>	» Fisheries: Dingle; Castletownbere: Dunmore East; Howth; Killybegs; Rossaveel	» Priority for Dept is fishing » Needs of passenger boat operators are given least priority
<b>Port Company</b>	» 12 ports including Bantry; Dublin; Dundalk; Cork; Galway; Waterford » Semi-state company » Dún Laoghaire transferred recently to local council	» Priority is profit through commercial transport business » Some operators moving out of the city: opportunity for cities eg Galway City
<b>Councils</b>	» Most piers and harbours are in council ownership	» Lack of funding has meant this doesn't always meet the needs of the operators and customers
<b>Other</b>	» Office of Public Works – Blasket Islands » Private ownership: Tetrach Capital – Ireland's Eye	» The control of access to islands or other infrastructure can be limited depending on the ownership

Ownership of Harbours

## Marine Infrastructure

Coastal passenger boats use a variety of marine infrastructure at the harbours along the coast of Ireland.



Types of Infrastructure  
From top to bottom - pontoon; pier with steps;





# Harbours

## Enhancement of Harbours

There are over 100 harbours which facilitate passenger boat trips. Most of these would benefit from some improvement or intervention in the harbour itself or marine infrastructure (eg pontoon) to support coastal passenger boats. However, whilst most would slightly improve the visitor experience in some way, only a small number of interventions would make a significant impact on either:

- » Opening up new experiences eg Innishmurray
- » Ensuring continuation of experiences at risk
- » Improving visitor experience on embarkation/ disembarkation

## Cost of Marine Infrastructure

It should also be taken into consideration that marine infrastructure often requires significant financial investment and can vary substantially. For example:

- » Minor Infrastructure eg. purchase and installation of floating pontoon approx. €30,000
- » Major infrastructure eg pier extension and marina berthing approx. €3,000,000

There is a mixed picture for funding of marine infrastructure, often determined by the ownership of the harbour.

The table below outlines the sources of funding:

Organisation	Responsibility
Department of Agriculture, Food & Marine	<ul style="list-style-type: none"> <li>» Annual capital fund of €30 million, primarily dedicated to the six fisheries owned by DAFM.</li> <li>» €2.5m (of the €30m) is allocated each year to local authorities' projects.</li> </ul>
Bord Iascaigh Mhara/ FLAG	<ul style="list-style-type: none"> <li>» Minor infrastructure can be applied for up to €200k.</li> </ul>
Port Company	<ul style="list-style-type: none"> <li>» Any developments are funded by the semi-state port company.</li> </ul>
Councils	<ul style="list-style-type: none"> <li>» Limited budgets stretched across a large number of harbours.</li> <li>» Have the opportunity to seek funding from:               <ul style="list-style-type: none"> <li>• DAFM</li> <li>• Rural Regeneration and Development Fund</li> </ul> </li> </ul>
Department of Transport, Tourism, Sport	<ul style="list-style-type: none"> <li>» No key projects currently relating to marine infrastructure.</li> </ul>

## Harbour Conditions

The natural conditions at each harbour are an important factor for coastal boat operators. The main natural conditions of note include shelter, depth of water and tide. These factors can impact:

- » How many boat trips can take place on a given day or season
- » What type of boat the operator can operate
- » If it is possible for the boat operator to have a fixed schedule of trips or if this varies by day

## Options

Fáilte Ireland could play a significant role in the development of marine infrastructure to support the coastal passenger boat sector should relevant funding become available. This could include support for:

### Minor Infrastructure

Consideration should be given to the provision of funding specifically for minor infrastructure improvements, such as installation of pontoons. This would enable an increased frequency of experiences and potentially open some currently inaccessible locations. Therefore any support to the sector should be targeted to provide greatest return on investment.

### Major Infrastructure

Fáilte Ireland could seek to influence those major infrastructure developments with a direct impact on tourism and support specific projects where the impact on tourism is greatest. This may include financial support where deemed necessary and appropriate.

Support for minor and major marine infrastructure should be targeted and this is considered later in the report.





# 07

---

## Offering and Opportunities by County





# Offering and Opportunities by County

A brief summary of the current coastal passenger boat offering in each of the coastal counties in Ireland is outlined.

## Donegal

Currently in Donegal, there is limited provision of scheduled sightseeing trips and demand is being met through additional charter provision. Primary experiences include:

- » Sliabh Liag from Teelin
- » Sliabh Liag from Killybegs
- » Donegal Bay Tour



Sliabh Liag Tours

## Sligo

There is scant provision of coastal passenger boat trips in County Sligo since access to Innishmurray Island was revoked in 2018. Current provision has reverted to mostly fishing charters from Rosses Point.

## Mayo

Currently there is adequate provision of coastal boat trips that meets visitor demand in County Mayo, with charter boats operating when demand requires. Primary experiences include:

- » Sightseeing trips focusing on Westport and Clew Bay
- » Islands well catered for by ferry provision

## Galway

There is strong provision in County Galway to access the Aran Islands and Inishboffin by subsidised ferry. In addition, there is some provision by small boat operators in the Connemara area. There is an absence of any offering from Galway City. Primary experiences include:

- » Ferries to the three Aran Islands
- » Cleggan to Inishboffin Island is the main offering in Connemara serviced by subsidised ferry and several operators with small boats
- » Killary Fjord Boat Tours



Ferry Cleggan to Inishboffin Island

## Clare

Clare has high visitor demand for coastal boat trips, the focus predominantly being on Doolin which operates the largest coastal passenger boats on the Irish coastline. Primary experiences include:

- » Doolin has large visitor numbers and large boats – 100k+ visitors 2019, two key operators run trips to Cliff of Moher and Aran Islands
- » South/West has lower visitor numbers, smaller experience, further potential – e.g. Shannon Estuary, Scattery Island

## Kerry

There is strong provision in County Kerry, particularly passenger boat trips from Dingle harbour. Demand outstrips supply to Skellig Michael and to the Great Blasket Islands. Primary experiences include:

- » Dingle offers multiple passenger boat trips in the Bay mainly focused on the dolphin 'Funghi' but also eco tours and trips to Great Blasket Island
- » Portmagee/Ballinskelligs/Caherdaniel to Skellig Michael - tours around island and limited number of tours which disembark on Island
- » Dunquin/Ventry to Great Blasket Island



# Offering and Opportunities by County

## Cork

Currently provision meets demand, in what is predominantly a sailing destination. West Cork offers a greater provision of experiences to East Cork where the offer is somewhat fragmented. Primary experiences include:

- » Good provision of coastal boat trips with the main provision out of Kinsale, Baltimore and Bantry
- » The numerous islands of the inlets such as Roaring Water Bay are all currently provided for through a combination of boat excursion and ferry provision
- » An existing ferry operator is launching a new service out of Cork Harbour – planned for Spring 2020 but delayed due to Covid-19



Kinsale Harbour Cruises

## Waterford and Wexford

There is limited provision in counties Waterford and Wexford with the majority of the provision in Waterford city and on the Waterford Estuary which borders both counties. Primary experiences include:

- » Waterford Estuary boat tours to Hook lighthouse
- » Waterford City tours along the River Suir from the marina in city centre
- » Regular ferry across the estuary from Wexford to Waterford

## Wicklow

There is little provision for coastal passenger boating in Wicklow other than a limited charter offer. The seascape lacks the visual appeal of other areas such as the Wild Atlantic Way and as such there is no demand for sightseeing boat trips along this stretch of coast.

## Dublin

There is some provision of coastal passenger boat trips in Dublin and this is largely centred around Howth and Ireland's Eye island. In addition, some boat trips are offered on the Liffey in the City itself, although these are limited. Primary experiences include:

- » Howth to Ireland's Eye plus coastal tours from Howth
- » Howth / Dublin City/ Dún Laoghaire operated by Dublin Bay Cruises
- » Boat charter from Malahide



Dublin Bay Cruises

## Meath and Louth

There is limited provision in this area with Louth Adventures offering coastal boat excursions alongside a RIB experience in Carlingford Lough and the subsidised Carlingford Lough Ferry operating from Greencastle to Greenore.

## Experience Opportunities

As part of this study, specific opportunities for coastal passenger boats were identified for each county. These opportunities are highlighted in the tables overleaf.





Experience Opportunities				
Experience	County	New or Existing Experience	Opportunity	Support Required from appropriate Departments and/or Public Bodies
<b>Fanad Lighthouse / Malin Head</b>	Donegal	New & Existing	» Currently only charter provision, but key destination on WAW route	» Marketing support for charter operators from appropriate departments and/or public bodies
<b>Sliabh Liag from Teelin</b>	Donegal	Existing	» Increased visitor numbers means demand soon to outstrip supply	» Teelin – funding for additional pontoon to facilitate additional / larger vessels » Marketing support to existing operator
<b>Sliabh Liag from Killybegs</b>	Donegal	Existing	» Operator vessel purchase (currently leases) to offer quicker journey time to cliffs and greater passenger comfort	» Dedicated area/booking office for Atlantic Coastal Cruises » Financial subvention for the purchase of a vessel
<b>Donegal West Coast Islands Mullaghmore</b>	Donegal	New	» Opening potential new destinations with landing craft vessels	» Financial subvention for the purchase of a vessel
<b>Inishmurray Island from Rosses Point or Mullaghmore</b>	Sligo	Previously Existing (currently not in operation)	» Opportunity to re-instate and enhance this experience.	» Encourage relevant bodies to progress as priority for tourism » Financially support request for funding for minor infrastructure » Develop experience on the Island
<b>Blacksod Bay/ Dugort, Achill</b>	Mayo	New & Existing	» Develop experience to the Croaghaun Cliffs	» Relevant bodies to support funding for minor infrastructure: • Replacement pontoon at Dugort; • Installment of pontoon at Blacksod » Develop and market the experience
<b>Westport – Clew Bay</b>	Mayo	New & Existing	» Enhance Clew Bay offer through development of Westport Harbour	» Monitor progress of plans with a view to long-term development of additional experiences
<b>Downpatrick Head</b>	Mayo	New	» Develop experience to Downpatrick Head Headland and Sea Stack to tie in with signature discovery point on the Wild Atlantic way.	» Potential marketing and business development support to boat operator to encourage experience development » Assess minor infrastructure improvements required
<b>Galway Port</b>	Galway	New	» Galway Port redevelopment by 2024. » New routes: tours of Galway Bay; seafood tours; Bay taxi etc.	» Stimulate the development of vibrant passenger boat services from the city, ensuring the port is not dominated by private yachts
<b>Aran Islands</b>	Galway	New	» Ferry direct from Galway City (currently visitors have to travel to Rossaveel)	» Stimulate the development of experiential boat trips to the Aran Islands » Liaise with relevant departments/bodies on provision of ferry
<b>Connemara and Islands</b>	Galway	New & Existing	» Diversification of tours in Connemara and to Inishboffin	» Variety of support to current boat operators
<b>Killary Fjord</b>	Galway	Existing	» Potential development of unique ‘eco’ vessel suitable for Fjord cruises	» Potential funding for upgrade boat or purchase new ‘eco vessel’
<b>Scattery Island</b>	Clare	Existing	» Improve potential visitor experience on Scattery Island and visitor capacity	» Funding for infrastructure (pier extension) on Scattery Island » Support and influence OPM on development of improved visitor facilities on island (sheltered visitor provision etc). » Support RDP application for enhancement of visitor experience – restoration of ‘street’ on Scattery Island
<b>Shannon Estuary</b>	Clare	New (in development)	» Scattery Island Tours operator launching Sionnan Luxury Cruises for 2021 season	» Support in marketing the new experience as part of wider destination offer
<b>Doolin</b>	Clare	Existing	» Masterplan for improved visitor facilities currently in development	» Monitor progress and assist operators in marketing enhanced offer accordingly



Experience Opportunities				
Experience	County	New or Existing Experience	Opportunity	Support Required from appropriate Departments and/or Public Bodies
<b>Skellig Michael Luxury Cruise</b>	Kerry	New	» Introduce a unique vessel with larger capacity (accommodate coach parties) and luxury comfort.	» Financial subvention for the purchase of a vessel » Financial support to improve infrastructure: Ballinskelligs requires pontoons
<b>Great Blasket Island</b>	Kerry	Existing	» Increase the capacity to Great Blasket Island and enhance the experience	» Encourage relevant bodies to progress redevelopment of Dunquin and Great Blasket Island harbours as tourism priority » Financially support request for funding » Develop experience on the Island
<b>WAW Cruising</b>	Kerry	New	» Offer multi-day luxury cruising around the west coast and islands. Focus on fine food produce and on-land excursions for cycling, walking, photography etc.	» Financial subvention for the purchase of a vessel
<b>Cork Harbour</b>	Cork	New (in development)	» Development of the newly launched route and potential additional experiences that could operate out of Cork Harbour.	» Intervention – ensure jetty is retained to allow continued operation » Marketing support for new routes
<b>Kinsale Harbour &amp; Area</b>	Cork	Existing	» Retain and enhance existing water taxi service to include potential additional destinations such as Summer Cove.	» Financial support for improved infrastructure: additional pontoon & potential dredging » Financial subvention for the purchase of a vessel to incentivise reinstatement of taxi service
<b>Ballycotton Island</b>	Cork	New & Existing	» Improve and develop experience to Ballycotton Island and Lighthouse	» Financial support for improved infrastructure: pontoon required
<b>Waterford City</b>	Waterford	New & Existing	» Redevelopment of Waterford North Quay	» Ensure a pontoon and booking area to accommodate passenger boats is incorporated into plans » Stimulate the development of experiential boat trips
<b>Dunmore East to Tramore</b>	Waterford	New	» Given the development of a new coastal walking trail from Dunmore East to Tramore, potential opportunity for a linear walk with return by boat.	» Stimulate the development of boat trip/walk experience
<b>Bray</b>	Wicklow	New	» Potential major infrastructure works at Bray Harbour to allow motor boats to operate thus opening up a new route with great potential	» Funding for infrastructure identified within feasibility report » Stimulate the development of experiential boat trips
<b>North Dublin Tours</b>	Dublin	Existing	» Skerries and/or Malahide to Lambay island and tours	» Support to operators in area to provide regular service
<b>South Dublin Tours</b>	Dublin	Existing	» Coliemore (Dalkey) to Dalkey Island	» Support to operators in area to provide regular service
<b>Dublin City to Dún Laoghaire: by boat and Dart</b>	Dublin	New & Existing	» Opportunity to develop experiences linking Dublin and Dún Laoghaire.	» Engage with council to support developments for harbour encouraging marine tourism and passenger boat trips » Support to market the experience
<b>Howth to Ireland's Eye</b>	Dublin	Existing	» Safeguard the provision to existing popular destination.	» Encourage resolution of dispute to ensure this experience is retained
<b>Howth</b>	Dublin	Existing & New	» Demand outtrips supply at Howth – safeguard and increase provision.	» Ensure passenger boat trips are safeguarded and increased if possible
<b>Liffey experience</b>	Dublin	Existing	» Opportunity to grow demand close to City for Liffey Tours.	» Fáilte Ireland to liaise with Visit Dublin to encourage Ferry 11 experience development





# 08

---

## Way Forward



Killary Harbour, Galway

# Way Forward

**It has been identified that on-water experiences, such as coastal passenger boat trips, have the potential to act as an innovation platform to grow tourism in Ireland. Whilst the sector has grown in recent years, there is an opportunity to improve the visitor experiences on offer and develop new experiences. It is recommended that a combination of the following options is considered in order to grasp the opportunity.**

## Seek a change in regulations

It is recommended that a detailed and independent study is commissioned to understand how to facilitate the growth of the coastal passenger boat sector without compromising on safety.

## Build capacity of boat operators

It is recommended that mentoring is delivered by Fáilte Ireland's destination teams. This would take the form of 1-to-1 mentoring with prioritised boat operators (as identified in the detailed study). The mentoring would supplement the existing Fáilte Ireland business development support on offer.

## Influence and support major infrastructure development

It is recommended that Fáilte Ireland considers influencing major infrastructure developments with a direct impact on tourism and offer support on specific projects where the impact on tourism is greatest. This may include financial support where deemed necessary and appropriate. There are three development projects which would significantly enhance the offering in the coastal boat sector:

- » Sliabh Liag
- » Galway City
- » Blasket Islands

## Develop a grants programme

Should funding become available, the implementation of a three-strand grants programme to support vessel acquisition, vessel upgrade and minor infrastructure improvements should be considered. It is proposed that all strands are administered through a partnership approach with BIM/FLAG given that mechanisms are already in place through regional Local Action Groups (LAG). Each LAG would provide a level of expertise and specialised local knowledge relevant to marine tourism development. Whilst the remit of BIM/FLAG is wide, this would enable enhancing

allocation in a targeted way.

It is recommended that any intervention to support the growth and development of the sector, such as training or financial support, would take the Critical Success Factors into account.

The table overleaf evaluates the options and considers the time frame for their implementation.

## Current Environment

At the outset of this project, the recommendations of this study were due to inform the criteria for an investment scheme specifically designed for 'On Water Experiences'. However, due to the catastrophic impact of the Covid-19 pandemic on the tourism industry in Ireland, the scheme is in question, or as a minimum may be considerably curtailed. Fáilte Ireland's top priority for some time to come will be to support Ireland's tourism businesses to survive and recover from the impact of the pandemic.

Given the potential scale of investment and resource that would be required to support the options to develop the passenger coastal boat sector, it is suggested that the recommendations and action plan (overleaf) are given further consideration and actioned in a phased manner.





## Evaluation of Options and Plan of Action

Options	Evaluation	Phase 1 Action (1-2 years)	Phase 2 Action (3-4 years)	Phase 3 Action (5 years+)
Seek change in regulations	Requires significant investment to investigate options No political appetite currently	No action	Communicate to Department of Transport, Tourism and Sport and relevant Minister impact of regulatory framework on the passenger boat sector to raise awareness of issue	Consider appetite to commission study into the regulatory framework to understand how to facilitate the growth of the coastal passenger boat sector
Build capacity of boat operators	Potential 'quick win' for sector Requires resource from Failte Ireland team and destination teams; teams are currently dedicated to Covid-19 recovery	Liaise with Sector Development team and Destination Teams to set up 1-to-1 mentoring scheme and roll out with 'top priority' boat operators	Roll out 1-to-1 mentoring scheme with other priority boat operators	Assess impact of mentoring to evaluate way forward
Support major infrastructure development	This option has the potential to be a 'game changer' for the sector Efforts to influence the development of infrastructure may or may not be effective. Any financial support would have to be very significant	Communicate with all stakeholders the potential impact of their project on tourism Assess which projects are priority for tourism and requirement for additional resource to influence stakeholders effectively	As major developments are progressed, assess requirement and appetite to support	Reevaluate the progress of major developments and identify others
Develop a grants programme (should funding become available)	Vessel upgrade and minor infrastructure – potential 'quick win' Of the 3 strands, vessel acquisition requires by far the most significant investment	Assess potential costs to set up vessel upgrade and minor infrastructure improvements in a 'small grant scheme' Assess potential of partnership with BIM/FLAG	Review impact of small grants scheme to evaluate way forward Assess cost and appetite for grants programme to support vessel acquisition	Review grant scheme and impact on the sector



---

**For more information:**

Outdoor Recreation NI  
The Stableyard  
Barnett Demesne  
Malone Road  
Belfast  
BT9 5PB

048 9030 3930  
[info@outdoorrecreationni.com](mailto:info@outdoorrecreationni.com)

© Outdoor Recreation NI  
2020



**OUTDOOR  
RECREATION**  
NORTHERN IRELAND

