APPENDIX 5-1

TOURISM & ECONOMIC STUDY

Rialtas na hÉireann
Government of Ireland
Arna chomhchistiú ag an Aontas Eorpach
Co-funded by the European Union
Tionól Reigiúnach Oirthir agus Lár-Tíre
Eastern and Midland Regional Assembly
Fáilte Ireland
ROSCOMMON
Comhairle Contae Ros Comáin
Roscommon County Council
Waterways Ireland

The Hodson Bay Waterfront Park Project is co-funded by the Government of Ireland and the European Union through the EU Just Transition Fund

HODSON BAY WATERFRONT PARK DEVELOPMENT

TOURISM & ECONOMIC STUDY

Prepared By CHL & Associates August 2026

CHL

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Project Overview

Hodson Bay Waterfront Park (HBWP) is a coherent multi-dimensional proposition which aims to transform the lakeside offerings at Hodson Bay through investment in best-in-class infrastructure. The scheme proposed for HBWP is not simply an upgrade of existing facilities but rather a radical re-imaging of its lakeside location as a significant addition to the leisure and tourism offering in the region. It presents added value opportunities for range of visitors and regular users including on and in water access and quality social and leisure amenities.

The following outlines key points raised in the respective sections of this tourism and economic study.

Project Background and Methodology

- Hodson Bay is a strategically significant location within Ireland's Hidden Heartlands with strong potential to develop as an important amenity and tourism asset.
- The HBWP Masterplan aims to develop as a flagship waterfront recreational park on the River Shannon as a key tourism/recreational attraction while enhancing connectivity, recreation facilities, and access to nature.
- This study was conducted in two stages combining market research, stakeholder consultation, demand modelling, and economic impact assessment to evaluate the scheme's performance potential.

Current Position Analysis

- Strong alignment exists between national/regional policy and Hodson Bay's natural assets, particularly in water-based, nature-based, and cluster-led tourism.
- The current offer - both at Hodson Bay and in the wider area - is characterised by seasonality, fragmentation, and limited multi-day experiences, with a dominance of soft adventure activities.
- Key constraints include underdeveloped ancillary services, weak integration of experiences, and limited year-round depth, despite a strong natural asset base.

Additionality & Clustering

- The proposed development across public realm, marina, water sports pavilion, café and visitor services radically changes the profile of Hodson Bay from a local amenity with seasonal visitor appeal to a year-round leisure and lifestyle destination.
- The addition of all of the elements together greatly enhanced the standard of the location improving quality of life and social infrastructure for local communities and positioning Hodson Bay as a major visitor destination in Ireland's Hidden Heartlands.
- The HBWP has potential to act as a catalyst for wider destination development, functioning as an anchor within a Lough Ree tourism cluster.
- Clustering of water-based, hospitality, heritage, and outdoor activities can create a multiplier effect, increasing dwell time and visitor spend.
- Strong opportunities exist for multi-day itineraries, intercounty collaboration, and integration with Blueway and Greenway networks.

Market Opportunity

- Significant opportunity exists to activate local, domestic, and niche tourism markets through an expanded, integrated, year-round offer.
- Core markets include a large catchment population, domestic tourists, boating visitors, schools, and special interest groups.
- Demand is driven by the ability to address gaps in integration, seasonality, and product diversification, particularly in nature-based and wellness experiences.

Demand Analysis & Projection

- Estimated demand is approximately 168,000 visitors annually at full operation, based on conservative penetration rates and benchmarking.
- Demand is influenced by accessibility, market scale, quality of experience, and ability to generate repeat visits.
- The proposed development represents significant additionality, exceeding current visitation levels and enabling capture of passing boat traffic and increased dwell time.

Governance, Operations & Staffing

- A subsidiary model (DAC/CLG) is recommended to balance commercial agility, governance, and risk management.
- Operations should be delivered through contracted operators, with flexibility for single or multiple providers.
- Success depends on strong governance, professional management, and structured stakeholder engagement.

Revenue Potential

- Revenue is driven by increased dwell time, multi-activity participation, and ancillary spend.
- Key income streams include watersports, aquapark, food & beverage, and events.
- Potential exists for licence fee income to the local authority, supported by a commercially viable operating model.

Economic Impact

- The development will generate economic benefits during both construction and operational phases, including employment and regional spend.
- Broader benefits include enhanced destination attractiveness, increased visitor satisfaction, and contribution to regional tourism growth.
- Additionality extends beyond visitor numbers to include value capture, extended stays, and improved tourism quality.

Risk Analysis & Funding Pathway

- Key risks relate to demand realisation, operational delivery, and market competition.
- Mitigation requires phased development, strong governance, and alignment with market demand.
- Funding pathways include a mix of public investment, potential partnerships, and revenue-generating operations. In addition to Roscommon County Council, other key funders include Fáilte Ireland, Waterways Ireland, RRDF and Transport Infrastructure Ireland.

1. PROJECT BACKGROUND AND METHODOLOGY

1.1 Project Background

The Hodson Bay area is a key location within Ireland's Hidden Heartlands and the Mid Shannon Region in terms of leisure, tourism, amenity provision and is well known as a leisure destination. The area is recognised as having high amenity and natural heritage value with the potential to develop further as an important amenity and tourism asset, while ensuring the protection of the sensitive environment of the lake and its shores which hold Special Area of Conservation (SAC) and Special Protection Area (SPA) designations.

A Constraints and Preferred Options study commissioned by Roscommon County Council in 2023 identified key issues of access, capacity, quality and clustering resulting in four developmental priorities:

1. Promenade Development
2. Marina Development
3. Reimagined Water Play Experience
4. Access, Parking & Transport Strategy

In order to address these issues and enable the Hodson Bay area to fulfil its potential the Hodson Bay Waterfront Park (HBWP) Masterplan which commissioned in April 2025 with the intention of achieving the following objectives:

- To develop Hodson Bay as a flagship recreational attraction in County Roscommon and Ireland's Hidden Heartlands.
- Provide high-quality recreation facilities for both the surrounding population and visitors to the area.
- Enhance opportunities to be active in nature and establish a destination for regenerative tourism.

- Improve both physical and visual connectivity with the River Shannon and Lough Ree.

1.2 Methodology

CHL & Associates were commissioned in June 2025 along with Red C market research specialists to undertake a Tourism and Economic Benefit Study for the Hodson Bay Waterfront Park Development on behalf of Roscommon County Council. The Tourism and Economic Study was commissioned under Civic Engineering, project lead for the master planning team. CHL & Associates work plan was aligned to the wider project programme and design team outputs to ensure continuity in the assessment of the performance potential of the scheme.

The work has been conducted in two phases. Stage A, which was undertaken between June and November 2025, and Stage B which has been undertaken from December 2025 – June 2026. This study presents the findings and analysis of those two stages with the supporting information and supplementary reports carried in the appendices.

Stage A was focused on market research and current position analysis to establish a baseline. An island wide review of watersport and marina facilities like those at Hodson Bay was undertaken along with a comprehensive review of international projects to inform the concept development for the scheme. Emerging design thinking was tested with key stakeholders and relevant consultees in tourism and business. Data was collected for existing businesses, namely the Hodson Bay Hotel, Baysports, Athlone Golf Club and Viking Tours. The study team extends sincere thanks to these parties for sharing extensive visitor and operational information to inform the tourism and economic study. Mapping capacity and current performance, along with midlands specific comparator analysis formed the basis of the market demand analysis for which market segments and scale of unmet markets was considered. Red C conducted visitor profiling of 824 visitors who were surveyed on site at intervals between June and November 2025.

This stage also considered ways in which the Hodson Bay Waterfront Park development would contribute to destination development in line with the strategic agendas for tourism development in Ireland's Hidden Heartlands, Shannon Tourism Masterplan 2020 – 2030, the Roscommon Tourism Strategy 2025 – 2030, and more broadly, how the scheme aligns with the priorities for the Roscommon County Council Development Plan 2022 – 2028. Extensive consultation took place with key stakeholders, potential operators and users of Hodson Bay as a leisure amenity to inform design and test assumptions which would underpin Stage B of the Tourism and Economic study. Data and analysis are presented through this study in the relevant sections, and the full report is available separately.

The focus of Stage B was to assess the likely impact of the proposed scheme from a tourism and economic perspective. This included considering bringing the new development to market and operational and governance models which would provide a sustainable viable model moving forward. In this we considered key stakeholders and the opportunity for different licensing / leasing arrangements.

The demand projections, which draw on the data collection in Stage A, were arrived at by applying realistic penetration rates and subsequently tested against benchmarked data. Dwell time, pricing and seasonality were modelled to generate a summary assessment of revenue potential based on the demand projections. An economic impact assessment for the capital investment and construction phase and beyond to operations was prepared before considering risks, mitigations and phasing.

The following sections outline the outcomes to this approach presenting findings and analysis relevant to the assessment of tourism development and economic impact, with supporting information carried in the appendices.

2. CURRENT POSITION ANALYSIS

2.1 Strategic Context

The development of the HBWP sits within a well-defined policy framework at national, regional and local level, all of which emphasise the strategic role of tourism as a driver of regional economic development.

Across these frameworks - including the National Development Plan, Regional Spatial and Economic Strategy, National Outdoor Recreation Strategy, Fáilte Ireland's Hidden Heartlands Strategy, the Shannon Tourism Masterplan, the Roscommon Tourism Strategy 2025-2030 and the Failte Ireland Mid Shannon Destination and Experience Plan - there is a consistent emphasis on:

- Leveraging natural assets (particularly waterways and landscapes) as tourism drivers
- Developing destination clusters, rather than standalone attractions
- Enhancing connectivity, including greenways, blueways, and transport links
- Supporting sustainable and year-round tourism activity
- Strengthening regional centres, with Athlone identified as a key growth node

Within this context, Lough Ree and the wider Shannon corridor are repeatedly identified as priority locations for investment and development.

Hodson Bay occupies a strategically significant position within this policy landscape due to:

- its location on Lough Ree, a designated priority node within the Shannon system
- its proximity to Athlone, a recognised regional growth centre
- its existing base of tourism and leisure activity
- its accessibility via national road networks and emerging greenway connections

This positions the site as a natural focal point for the delivery of policy objectives relating to water-based tourism, outdoor recreation, and regional destination development.

A review of the relevant strategies that form the policy framework highlights several themes of direct relevance to the proposed development. These are summarised below, and more detail is provided in Appendix 5.

1. Clustering and Destination Development
Policy frameworks consistently promote the development of tourism clusters, where accommodation, activities, and supporting services are co-located to create stronger visitor propositions. The implications of this are that HBWP has the potential to function as an anchor within a wider Lough Ree and Shannon tourism cluster, but this requires a more integrated and complementary product development.

2. Water-Based and Nature-Based Tourism
The Shannon corridor is identified as a key asset for Ireland's Hidden Heartlands, with a focus on boating, paddling, angling, and immersive nature experiences. This indicates strong policy support for expanding and diversifying water-based activity at Hodson Bay, particularly where this enhances accessibility and broadens appeal.

3. Connectivity and Active Travel
Significant investment is being directed towards greenways, blueways, and sustainable transport infrastructure linking towns, attractions, and natural assets. Improved physical and experiential connectivity will be critical to maximising the role of Hodson Bay within regional tourism itineraries.

4. Season Extension and Product Diversification
A key objective across all strategies is to reduce seasonality and increase year-round tourism activity through diversified offerings, including wellness, culture, and events. The current seasonal bias of activity at Hodson Bay represents both a constraint and a clear development opportunity.

5. Sustainability and Environmental Stewardship

All frameworks emphasise the need to balance tourism growth with environmental protection, particularly in sensitive lake and river environments. Future development at Hodson Bay will integrate sustainability principles, both as a requirement and as a potential differentiator.

6. Regenerative Tourism

The HBWP project can become a model for regenerative tourism within Ireland's Hidden Heartlands. The project will place emphasis on restoring natural systems around Lough Ree, strengthening the local community, and ensuring that increased visitation contributes positively to the region's long-term resilience. By designing experiences that deepen visitors' connection to the lake environment, supporting low carbon mobility, enhancing biodiversity along the shoreline, and ensuring that tourism revenue circulates locally, the project will align with the EU Just Transition Fund's focus on sustainable regional transformation and positions Hodson Bay as a flagship example of regenerative tourism.

The policy environment provides strong and consistent support for the type of development proposed at Hodson Bay. However, it also establishes clear expectations that such development should:

- contribute to wider destination clustering
- enhance connectivity within the Shannon corridor
- support year-round tourism activity
- and be delivered in a sustainable and environmentally sensitive manner

In this context, the proposed scheme represents not only a site-specific intervention, but a potential catalyst for wider tourism development across the Lough Ree region.

2.2 Current Tourism and Leisure Offer at Hodson Bay

2.2.1 Overview

The existing offer at and around Hodson Bay is primarily centred on accessible, nature-based experiences, particularly those aligned with the 'soft adventure' category. These include paddle sports (kayaking, SUP), guided boat tours, inflatable water park, angling, and informal lakeside recreation. Such activities appeal strongly to family groups, beginners, and domestic leisure visitors seeking easy engagement with the natural environment.

While a smaller number of higher-intensity ('hard adventure') activities exist in the wider area - including open-water swimming events, sailing, and endurance-based water sports - these remain niche and are not a primary driver of visitor volume.

Analysis of the current tourism and leisure offer highlights several defining characteristics:

- Strong seasonal concentration, with activity levels heavily weighted towards summer months
- Dominance of single-activity experiences, with limited packaging or bundling into multi-day offers
- Fragmented provision, with operators and experiences functioning largely independently
- Limited development of shoulder and off-season products, particularly in wellness and indoor-supported activities.

2.2.2 Existing Operators

Bay Sports is the primary operator at Hodson Bay and offers:

- Ireland's largest inflatable waterpark, with giant floating slides, obstacle courses

- Kayak, SUP rental, dragon boat racing, pedal boating, powerboat training,
- lakeside sauna, hot tub and cold plunge.

They offer group packages, sailing summer camps, and boat tours of Lough Ree operating seasonally April – September, employing eighty seasonal staff, and a core year-round team of six. The rest of the year they operate the café, sauna and hot tub on weekends or reduced hours during holidays with boat tours and training available on request.

Viking Boat Tours offers seasonal boat tours from Athlone to Hodson Bay and back operate several times a day highlighting the monastic heritage story of Lough Ree.

Table 1 provides a summary of current baseline capacity and demand levels experienced by these operators across various activities.

TABLE 1. HODSON BAY VISITOR NUMBERS & CAPACITY

Years	Baysports		Viking Tours	
	Visitor No.	Capacity %	Visitor No.	Capacity %
2021	80,000	43.6	40,000	46
2022	32,477	17.7	40,000	46
2023	29,908	16.3	40,000	46
2024	40,917	22.3	40,000	46
2025	44,954	24.5	40,000	46

Baysports experienced a downturn in numbers during 2022 and 2023 when the waterpark offering was reduced while planning was being sought for larger inflatable water slides. They are on a growth trajectory to 2021 figures, and beyond, now permissions are in place. Customer volumes for f&b on site are estimated at 17.5K – 22K over the five-month operating seasons which makes a significant contribution to the €850,000 turnover.

While not specifically part of the Hodson Bay Waterfront Park development, Hodson Bay Hotel is an important anchor to the year-round visitor activity to the site. The hotel reports 80% bed occupancy (94,000 per annum) with an additional 49,000 attending weddings, events and conferences without an overnight stay. F&b customers are estimated at 30,000 with an average spend of €49.00. The hotel employs 355 staff in full-time, part-time and casual roles, and has a turnover of €14.8 million net of VAT.

Athlone Golf Club, also an important anchor activity on the peninsula, like many members owned facilities is run by a voluntary committee made up of representatives from the 925 members. The club employs 7 full time staff and operates a successful year-round f&b offer under licence.

Data for the marina at Hodson Bay is not formally collected. However, anecdotally, the current marina is under-utilised as mooring facilities are basic and there are no services on site. A review of Waterway Ireland marina facilities of a similar scale proposed for Hodson Bay and analysis of the current lock traffic and cruising trends demonstrates that there is a strong future market for an upgraded, flagship marina at locations with excellent connectivity along the Shannon network. The review is presented in Appendix 7.

2.3 Current Tourism and Leisure Offer in the Wider Area

Ireland's Hidden Heartlands has a strong base of water-based and waterside recreation, with Lough Ree as a key node within this wider network. A broad mix of on- and near-water experiences is available across the region.

2.3.1 Overview of Water Sports

Water-based activity in the region is dominated by 'soft adventure – 'low-risk, accessible activities requiring little prior experience. These include:

- Stand-up paddleboarding (SUP)
- Kayaking and canoeing on lakes and slow-moving rivers
- Guided boat tours
- Pedal boating and inflatable water parks
- Wild swimming and cold-water experiences (often paired with sauna/wellness)
- Fishing and cruising

These activities primarily attract families, beginners, older adults and wellness-oriented visitors seeking accessible engagement with nature.

'Hard adventure 'activity is present but more limited and niche. This includes:

- Open-water swimming events
- Triathlon training and endurance sports
- Advanced kayaking and sailing
- Diving and specialist water sports
- Wilderness canoeing and expedition-style activity

These tend to attract more experienced users and contribute less to overall visitor volume.

2.3.2 Water-Adjacent Activities

Waterside environments are a key part of the visitor experience. Common activities include:

- Walking and Nordic walking
- Cycling along lakeshore and Blueway routes
- Wellness retreats (sauna, forest bathing, mindfulness)
- Angling and guided nature tours
- Seasonal festivals and community events

Across the Midlands, many offerings combine water and land-based activity, though these are often loosely connected rather than integrated.

2.3.3 Regional Activity Base

The wider Shannon and Midlands area offers a dispersed but varied activity base:

Banagher / Shannon corridor – swimming (see following image), kayaking, SUP, cruising, fishing, and outdoor education

Lough Derg – sailing, water sports centres, walking routes, and events

Cavan Lakes – adventure centres, inclusive water sports and group activity

Tarmonbarry / Blueway – paddling routes, angling and marina-based activity

Lough Ree – boating access, sailing clubs, and limited structured tourism offers

Ballyleague - access for all boat tours to Lough Ree

While the range of activities is strong, provision is fragmented and often lacks integration into cohesive visitor experiences. See Appendix 6 for a more detailed breakdown of providers.

2.3.4 Food & Beverage

Around Lough Ree, dedicated lakeside facilities for the provision of food and beverage are patchy. Towns like Athlone and Lanesborough offer a variety of hospitality options, including pubs, cafes and restaurants, but smaller lakeside towns and villages often lack consistent or year-round services. In some areas, food offerings are seasonal or entirely absent, particularly near trailheads, slipways or mooring points, impacting both visitor satisfaction and the local economic potential of outdoor recreation.

Some exceptions include the Lough Ree Inn at Coosan Point, Athlone. Now under new ownership, the pub is currently (July 2025) being upgraded to include a refreshed menu and improved facilities, including a camping ground with a kids' playground and views of the lake. Ballykeeran is home to Lough Ree East Caravan & Camping, a very picturesque camping site that offers visitors kayaking, parasailing and boat rental, as well as facilities such as a shared kitchen, recreational room and disabled facilities, but no restaurant or café proper.

2.3.5 Wellness & Leisure Facilities

Much like the situation with food and beverage options, the provision of dedicated lakeside wellness facilities is fragmented. Where they do exist, most are temporary and/or mobile, e.g. barrel saunas on wheels. For example, Baysports' SauNua facility, with lakeshore wood-fired barrel saunas and hot tubs, changing facilities and hot showers; and nearby Coosan Point where the 'hot tub boat' – a small motor cruiser with a hot tub aboard (see image below) - brings visitors on cruises on Lough Ree and the Shannon.

However, Lough Ree has few of the more thoughtful, architect-designed amenities that are now starting to appear elsewhere in Ireland, similar in style to the Fernwood Lakeside Sauna & Plunge Pool in Clifden, Co. Galway, where the sauna building, almost hidden in the woodlands, is raised on stilts, partly to protect the landscape and partly to better capture views of the adjacent Salt Lake. Such amenities have long been popular in other European and Nordic countries, where the idea of 'blue wellness' is much more embedded, and architects have responded with elegant biophilic or ecological buildings (floating saunas, cafes, yoga/meditation retreats) that actively take their inspiration from their immediate environment and are cleverly integrated into those environments.

There are several walking trails across the area around Lough Ree, including the new loop trail on Yew Point, next to Hodson Bay Hotel, the Portlick Millennium Forest Walk and the 5km-long Shannon Bank Walk & Nature Trail, as well as relatively short, family-friendly trails like Warren Point trail (4.5 km) and The Commons North Woodland Walk in Lanesborough. Many of these have picnic areas and surfaced walks.

2.3.6 Ongoing Initiatives in the Midlands

One ongoing source of funds for the development and repair of recreational infrastructure is the Irish government's Outdoor Recreation Infrastructure Scheme[1] (ORIS). Part of Project Ireland 2040, the scheme is funded under "Our Rural Future" policy, which specifically prioritises the growing outdoor activity tourism sector as part of a long-term vision for a vibrant and sustainable rural Ireland that is a destination of choice for outdoor activities and adventure tourism.

In 2024 alone, the scheme is funding[2] the repair and/or upgrading of numerous recreational infrastructure projects near to or on freshwater bodies right across Ireland – everything from bike repair stations and accessible angling jetties to a feasibility study exploring the development of a sustainable 'canoe trail' on Lough MacNean, Cavan.

Though many of these are modest interventions, taken together they should improve domestic and overseas visitors' experience of Ireland's lakes and rivers and their adjacent environments. Importantly, the government recently upped the level of investment[3] in ORIS3which bodes well for a scheme which signals a more joined-up approach to the development of high-quality amenities in and around Ireland's rural waterways.

Lough Boora Discovery Park, County Offaly, which offers birdwatching, walking routes, angling (including accessible platforms for people with limited mobility), cycling and bike hire, sculptures in the parkland, and a fairy trail for children, is a popular destination for the immediate catchment. Bord na Móna are currently undertaking reviewing the upgrade of the Lough Boora amenity upgrade and expansion opportunities to include off grid accommodation and other commercial tourism products.

[1] https://assets.gov.ie/static/documents/oris-scheme-outline-2024-2025-b195ca9d-0d5d-4b46-9a4b-d60d8bee75ff.pdf
[2] https://assets.gov.ie/static/documents/outdoor-recreation-infrastructure-scheme-2023-project-development-measure-approved-pro.pdf
[3] https://www.oireachtas.ie/en/debates/question/2025-07-10/88/

Finally, the €7.8 million investment in the upgrading of visitor facilities at Clonmacnoise (an EU Just Transition funding project) and upgrading works at Shannonbridge will greatly improve access to the site by both road and water.

2.3.7 Conclusion

The Shannon Blue Way and introduction of the Green Way network is creating connectivity and opportunity for exploration and enjoyment of the Ireland's Hidden Heartlands region. Market appetite is increasing for slow tourism, with a greater appreciation of environmental impact and visitors actively seeking out destinations with sustainability credentials. This shift towards regenerative and positive impact presents many of our river, lake and landscape experiences in Ireland's Hidden Heartlands an opportunity. Public and private investment in developments along the Shannon and surrounding areas are likely to significantly elevate the region as an accessible leisure and tourism destination.

However, the current offer lacks integration, consistency and year-round depth. This creates an opportunity for a more cohesive, higher-quality destination proposition at Hodson Bay.

2.4 Gaps, Constraints and Implications

The analysis of both the strategic policy environment (Section 2.1) and the existing tourism and leisure offer (Sections 2.2 and 2.3) highlights a strong alignment between national and regional ambitions for tourism development and the inherent strengths of the Hodson Bay location. However, it also identifies a clear gap between:

- the role envisaged for the Shannon corridor and Lough Ree within tourism policy, and,
- the current scale, integration, and year-round performance of the existing offer.

Despite the strength of the natural asset base, several constraints limit the current tourism and economic performance of the Hodson Bay area. These include the following:

- Seasonality of demand, which restricts revenue generation and employment potential

- Underdeveloped ancillary offer, particularly in lakeside food & beverage and year-round amenities

- Limited integration between activities, reducing opportunities for increased dwell time and visitor spend

- Absence of higher-value or design-led experiences, particularly regarding wellness and nature/eco-tourism

- Weak translation of natural assets into structured visitor experiences, particularly for international markets

These factors indicate that while Hodson Bay is already an established leisure destination, its current offer does not fully capitalise on the scale of its wider catchment population, its strategic location within the Shannon corridor, or the growing demand for integrated, multi-day, and year-round tourism experiences.

The images below show some of the current infrastructure and the design proposals for the newly re-imagined HBWP which can be reviewed in full elsewhere in the planning pack.

Image Selection 1. Current Provision Water Sports & Marina


SPORTS
SPORTS

Image Selection 2. Proposed Future Development

Section 3 focuses on additionality and clustering of the re-imagined HBWP and how the project elements combine to underpin a significant new social, leisure and tourism destination.

3. Additionality & Clustering

One of the key objectives of the development of the integrated recreational amenity of HBWP is that it acts as a catalyst for the wider area. This section considers the strategic opportunities that will emerge from the development of these new amenities for strengthening the destination's offer.

3.1 Additionality & Programming

In the first instance, the proposed development across public realm, marina, water sports pavilion, café and visitor services radically changes the profile of Hodson Bay from a local amenity with seasonal visitor appeal to a year-round leisure and lifestyle destination. The addition of all of the elements together greatly enhanced the standard of the location improving quality of life and social infrastructure for local communities and positioning Hodson Bay as a major visitor destination in Ireland's Hidden Heartlands.

Lough Ree's temperate climate permits year-round activity, but demand peaks in summer and dips in winter. Strategic programming can smooth this curve extending the destinations profile as a year-round leisure and lifestyle destination. The addition of fit-for-purpose infrastructure to the area allows for the creation of a dynamic programme offering a much greater range of culture and leisure experiences, optimising the connectivity between the scheme elements and maximising year-round use of infrastructure. Table 2 below sets out suitable uses and programming opportunities through the year.

TABLE 2 : PROGRAMMING ACROSS HBWP

Season / Location	April – September	September – December	January – March
Lakeside Promenade	Regular & occasional walkers & runners of all abilities including wheelchair users.	Regular & occasional walkers & runners of all abilities including wheelchair users.	Regular & occasional walkers & runners of all abilities including wheelchair users.

Marina Promenade	Regular & occasional walkers & runners of all abilities including wheelchair users.	Regular & occasional walkers & runners of all abilities including wheelchair users.	Regular & occasional walkers & runners of all abilities including wheelchair users.
Marina	Year round and mooring for private, rental and commercial boat use. Originating point for Shannon tours, private hires and bespoke itineraries. Water taxi services Hodson Bay – Athlone return. Pontoon and slipway general public access for boats, kayaks and paddle boards.	Year round and mooring for private, rental and commercial boat use. Originating point for Shannon tours, private hires and bespoke boating itineraries. Water taxi services Hodson Bay – Athlone return. Pontoon and slipway general public access for boats, kayaks and paddle boards.	Year round and mooring for private, rental and commercial boat use. Originating point for Shannon tours, private hires and bespoke boating itineraries. Water taxi services Hodson Bay – Athlone return. Pontoon and slipway general public access for boats, kayaks and paddle boards.
Water Sports Pavilion	Water adventure park Kayaking / SUP-ing Dragon boating / casual boating Sauna & wellness packages Evening yoga & meditation Evening and weekend cultural events including music, recitals, literary events, food pop ups and craft / farmers markets.	Kayaking / SUP-ing Dragon boating / casual boating Sauna & blue wellness packages Yoga, pilates, zumba and indoor wellness activities Destination retreats - meditation & yoga with sauna and wild swimming Speed boat training Water safety training Evening and weekend cultural events including music, recitals, literary events, food pop ups and craft / farmers markets.	Water safety training Speed boat training Dragon boat / casual boating Sauna & wellness packages Yoga, pilates, zumba and indoor wellness activities Destination retreats - meditation & yoga with sauna and wild swimming Speed boat training Water safety training Evening and weekend cultural events including music, recitals, literary events, food pop ups and craft / farmers markets.

Café Terrace & Plaza	Evening and weekend cultural events including music, recitals, literary events, food pop ups and craft / farmers markets.	Evening and weekend cultural events including music, recitals, literary events, food pop ups and craft / farmers markets.	Evening and weekend cultural events including music, recitals, literary events, food pop ups and craft / farmers markets.
Nature Zone	Wild swimming Sauna Nature trails Picnic zones Seasonal nature discovery events	Wild swimming Sauna Nature trails Seasonal nature discovery events	Wild swimming Sauna Nature trails Seasonal nature discovery events

*HBWP also includes an enclosed natural play area adjacent to the café

Existing operators have been very generous with sharing information, providing further level of commercially sensitive data would not be appropriate and therefore it is not possible to demonstrate in detail gaps between capacity and utilisation at this stage. Future business planning should reflect detailed operational projections for the facilities year round.

3.2 Tourism Clustering

Hodson Bay occupies a distinctive position on the northeastern shore of Lough Ree, one of the largest lakes on the River Shannon and a central feature of Ireland's Hidden Heartlands tourism brand. The area's appeal rests on a convergence of natural assets - open water, sheltered bays, woodland, and wetland - with heritage sites, established hospitality infrastructure, and proximity to Athlone, the largest town in the Midlands.

Tourism clustering describes the tendency for complementary attractions, services, and amenities to concentrate geographically, creating a self-reinforcing ecosystem that benefits visitors and operators alike. Clusters reduce friction for travelers - shortening distances between activities, meals, and accommodation - while enabling businesses to share infrastructure, cross-promote, and collectively raise the destination's profile.

At Hodson Bay, clustering occurs along two axes:

1. Waterfront concentration – marinas, watersports providers, angling guides, cruising operators, and lakeshore dining all gravitate toward the bay itself.
2. Hospitality anchoring – the Hodson Bay Hotel and its associated facilities act as a hub, drawing conferences, weddings, spa guests, and leisure visitors who then disperse into surrounding activities. The same opportunity applies to visitors to Athlone Golf Club whether to play or for the hospitality offer.

The interplay between these two axes generates a multiplier effect: visitors attracted by the hotel and golf club discover the lake and all it has to offer; boaters and anglers seek out quality accommodation and dining ashore.

3.2.1 Core Leisure Assets

Water-Based Activities: Lough Ree's 105 square kilometres of navigable water provide the foundation for Hodson Bay's leisure identity. Key offerings include:

- Cruising and boating – The Shannon Navigation connects Hodson Bay to a 250-kilometre inland waterway network. Hire cruisers, day boats, and private craft moor at local jetties, and operators offer guided lake tours highlighting islands, monastic ruins, and wildlife.
- Sailing and kayaking – Sheltered coves and variable winds suit both novice and experienced sailors. Kayak and stand-up paddleboard rentals introduce visitors to quieter inlets and reed-fringed shorelines.
- Angling – Lough Ree is classified as a brown trout and coarse fishery of national importance. Pike, bream, and perch draw specialist anglers, while fly fishing for trout attracts a dedicated seasonal cohort. Local guides and ghillies add expertise and access to less-pressured waters.

Land-Based Recreation: Beyond the waterline, the landscape supports walking, cycling, and golf:

- Trails and greenways – The Old Rail Trail Greenway passes through Athlone and connects to a growing network of off-road cycling and walking routes. Looped walks around Hodson Bay and into adjacent woodlands offer shorter options for hotel guests.

- Golf – Athlone Golf Club forms part of the cluster of amenities at Hodson Bay and offers both complementary sport and recreation facilities as well as an attractive place to gather for social occasions with an extensive F&B offering with exceptional views across the like. Furthermore, Glasson Golf Hotel & Country Club lie within a short drive, positioning the area as a golfing micro-destination with contrasting parkland and lakeside layouts.

Wellness and Hospitality: The Hodson Bay Hotel's spa, leisure centre, and dining options anchor a wellness proposition that complements active pursuits. Post-activity relaxation—thermal suites, treatments, poolside lounging—extends dwell time and encourages overnight stays rather than day-tripping.

3.2.2 Adjacent Experiences: Extending the Visitor Journey

Adjacent experiences are activities or attractions located near the core cluster that broaden appeal, lengthen stays, and diversify the visitor base. For Hodson Bay, these fall into three categories.

Heritage and Culture:

- Clonmacnoise – The early medieval monastic site, a 25-minute drive south, ranks among Ireland's most significant heritage attractions. Its round towers, high crosses, and interpretive centre draw history-focused visitors who often combine the visit with a night at Hodson Bay.
- Athlone Castle – The 12th-century Norman fortress, recently refurbished with interactive exhibits on the town's military and mercantile history, anchors Athlone's heritage offer and lies just ten minutes from Hodson Bay.
- Literary and musical heritage – Athlone's connection to tenor John McCormack and the broader Shannon region's folk music tradition provides programming opportunities for festivals and themed weekends.
- Derryglad Folk Museum and Glendeer Pet Farm are popular local attractions offering additionality for alternative types of experiences on a visit to Hodson Bay.

Food and Drink: The Midlands' emerging reputation for artisan food production creates cross-promotional possibilities:

- Local producers of cheese, honey, craft beer, and spirits can supply hotel kitchens and feature in tasting events.
- Farmers' markets in Athlone and nearby towns introduce visitors to regional flavours.
- Restaurant clustering in Athlone's Left Bank district offers evening dining alternatives, encouraging visitors to explore beyond the hotel while returning to Hodson Bay for accommodation.

Nature and Biodiversity: Lough Ree's islands, wetlands, and callows (seasonally flooded grasslands) support populations of wintering wildfowl, breeding waders, and rare plant species. Birdwatching, nature photography, and eco-tourism programming—guided boat trips to island habitats, dawn chorus walks—appeal to a growing segment of environmentally motivated travellers. Table 3 below considered the synergies and cross promotion between these adjacent activities and mechanism for connection.

Effective clustering depends on visible linkages between offers, Cross-promotion through shared booking platforms, bundled itineraries, and joint marketing campaigns can convert single-activity visitors into multi-day guests. Current and potential synergies at Hodson Bay are captured in summary in Table 3 below.

TABLE 3: SYNERGIES AND CROSS PROMOTION OPPORTUNITIES

Cluster Element	Adjacent Experience	Synergy Mechanism
Hotel spa	Greenway cycling	"Ride and restore" packages combining bike hire with post-ride treatments
Angling guides	Boat providers	Catch-and-cook experiences featuring guest's own fish
Lake cruises	Clonmacnoise	Boat-and-bus heritage, day trips departing from Hodson Bay

Cluster Element	Adjacent Experience	Synergy Mechanism
Conference facilities	Athlone Castle	Off-site team-building or gala dinner venue
Kayak rental	Island wildlife	Guided eco-paddle to nesting bird colonies (seasonal, permit-dependent)

3.2.4 Infrastructure and Connectivity

Clustering benefits erode if visitors struggle to move between attractions. Current infrastructure considerations include:

- Road access – The N6/M6 motorway places Hodson Bay within 90 minutes of Dublin, supporting both leisure and conference markets.
- Public transport – Rail services to Athlone connect to national networks; however, last-mile connectivity to Hodson Bay itself relies on taxis or private vehicles, a gap that shuttle services or cycle-hire schemes could address.
- Marina and mooring capacity – Waterway tourism growth depends on adequate berthing. Seasonal congestion at peak periods suggests scope for expanded or improved marina facilities.
- Digital infrastructure – Reliable broadband supports remote-working visitors and "workation" packages, a post-pandemic growth segment.

3.3 Competitive Positioning

Hodson Bay competes with other Irish lake and waterway destinations—Killarney, Carlingford, Westport—as well as with short-break alternatives across Europe. Its differentiators include:

- Central location – Equidistant from Dublin, Galway, and Limerick, accessible for domestic weekenders and conference delegates.
- Authentic Heartlands character – Less commercialised than coastal honeypots, appealing to visitors seeking quieter, nature-oriented experiences.

- Shannon Navigation access – Unique positioning on Europe's longest navigable river system, linking to a network of towns, locks, and heritage sites.

Communicating these strengths coherently—through destination branding, digital content, and trade engagement—will determine Hodson Bay's ability to capture a larger share of Ireland's growing domestic and international tourism markets.

3.3.1 Relationship by Water and Road Network:

Hodson Bay is strategically positioned at the midpoint of Ireland's inland transport geography—where the River Shannon meets a strong network of regional and national roads.

- Water Network: Hodson Bay sits directly on Lough Ree, part of the Shannon Navigation, which connects the northern lakelands (Lough Allen, Lough Key) to the southern Shannon and the River Erne system. This makes Hodson Bay a natural node on the Shannon cruising and blueway network. Day trips extend north to Portrunny, Ballyleague/Lanesborough, and south to Athlone and Clonmacnoise.

- Road Network: The M6 motorway provides direct access from Dublin (1.5 hours) and Galway (1 hour). The R446 and N61 connect Hodson Bay to Athlone (10 minutes) and onward to Roscommon, Longford, and Leitrim. This dual connection—water and road—makes it uniquely accessible to both self-drive visitors and cruising tourists.

There are some immediate opportunities for the Hodson Bay Waterfront Park development presented by the cluster created on the peninsula between Hodson Bay Hotel, Yew Point, and Athlone Golf Club and nearby Athlone.

Hodson Bay Hotel:

As the anchor leisure resort, the hotel's asset - conference centre, spa, lakeside bar, moorings, and proximity to active recreation - can serve as a gateway to a wider tourism cluster. Immediate opportunities include:

- Curated “Stay and Explore” multi-day itineraries combining wellness, activity, and heritage tours.
- Water-based eco-experiences, such as guided paddleboarding and evening lake cruises departing from the hotel jetty.
- Corporate retreat packages leveraging the hotel’s spa, sailing, and golf adjacencies.

Yew Point – Eco Tourism Resort:

Yew Point offers a rare and pristine landscape with woodlands, meadows, and lakeshore trails. Short-term opportunities:

- Nature immersion trails and interpretive walks focused on biodiversity and mindfulness.
- Outdoor events (e.g., summer concerts, wellness festivals).
- Eco-cabins or glamping (seasonal, low-impact accommodation) to expand capacity and diversify visitor profiles.

Athlone Golf Club:

Set on the edge of Lough Ree, immediately south of the hotel, Athlone Golf Club is part of the recreational backbone of the area. Opportunities include:

- Golf-and-lake packages marketed jointly with the hotel.
- Hosting amateur tournements and corporate days integrated with the broader Hodson Bay offer.
- Development of a shared clubhouse F&B package, promoting local foods and regional produce.

Athlone: The Urban Anchor:

Athlone functions as the hub town for the Hodson Bay cluster. Its castle, riverfront redevelopment, shopping districts, and nightlife make it the natural complement to lakeside recreation.

Key strengths:

- Athlone Castle, the Shannon’s gateway heritage site.
- Luan Gallery (contemporary art), adding cultural depth.
- The Left Bank dining district with locally sourced cuisine.

- Riverfront spaces suitable for festival programming and boat-to-town movement via cruising or shuttle service.
- Riverside boardwalk and outdoor swimming pool with additional boat parking facilities.

Athlone's continued development as the "Shannon capital" strengthens the Hodson Bay cluster by delivering urban cultural experiences to balance natural ones. Smaller Lough Ree locations which could be integrated into short day trip itineraries and 'explore more' packages. Lough Ree features distinct nodes that can be linked together into a coherent visitor system. Table 4 below summarises the key features and cluster relationships possible within the Lough Ree locations.

TABLE 4: LOUGH REE LOCATIONS

Area	Key Features	Cluster Relationship
Hodson Bay	Hotel, marina, watersports, Yew Point, golf	Anchor leisure hub
Portrunny	Beach, picnic areas, heritage trail	Family-friendly day stop
Ballyleague/Lanesborough	Blueway hub, angling centre	Northern activity base
Lecarrow Harbour	Access point to Rindoon* medieval town	Heritage and eco-tours
Inchcleraun Island	Monastic ruins, wildlife habitats	Guided nature and heritage excursions
Clonown Village & Clonmacnoise (south)	Sacred heritage route	Pilgrimage and boat cruises

- Access to Rindoon would need to be reinstated.

A "Lough Ree Experience Route", combining lake access points, community harbours, and heritage islands, could position Hodson Bay as the central base for multi-day lake tourism.

Lough Key Forest Park Connection:

Further away but equally as compelling as a potential promotion partner Lough Key in County Roscommon is approximately an hour north by road (via N61) and part of the same Shannon waterway system. As a complementary destination, it enhances Hodson Bay's multi-day potential:

- Lough Key offers forest canopy walks, zip-line courses, cycling, and eco-playgrounds, appealing to family markets. Plans are in place for a significant uplift of the leisure and recreation offer at Lough Key over the next decade positioning Lough Key as an anchor family adventure destination in the region. [4]
- Linking Lough Key, Lough Ree, and Lough Derg creates a 'Three Lakes Discovery Trail', marketing the midlands' lake system as an integrated eco-adventure corridor.
- Partnerships could include joint ticketing or cross-promotion of lakeside stays and nature activities.

3.4 Multi-Day Itineraries

Blueway Linkages: The Shannon Blueway offers the backbone for extended water, cycling, and walking experiences. Example itineraries could include:

3-Night "Lough Ree Discovery"

1. Day 1: Arrival at Hodson Bay, evening lake cruise.
2. Day 2: Kayaking to Inchcleraun Island, golf/spa afternoon.
3. Day 3: Drive or boat to Clonmacnoise and Athlone Castle; return via Lough Ree loop.

5-Night "Shannon Water, Wood & Heritage Trail"

4. Hodson Bay → Ballyleague → Lough Key Forest Park → Carrick-on-Shannon.
5. Blends cruising, cycling, forest adventure, and heritage exploration.

[4] https://loughkey.ie/strategic-plan/

Such itineraries distribute visitation across counties and encourage longer stays through linkable, bookable blueway experiences.

Greenway Linkages: The Old Rail Trail Greenway (Athlone–Mullingar) forms a spine for cycling and walking tourism, connecting directly to the Shannon Blueway via Athlone.

- Future link - a dedicated spur from Athlone town to Hodson Bay (approx. 6 km) would knit the greenway to the lake cluster.

- Integration with Rosommon's greenway proposals (Athlone–Ballaghaderreen) would form a regional cycling network intersecting with waterways—ideal for eco-conscious travellers.

Amenities like cycle hire, café hubs, and signage could turn Hodson Bay into a greenway terminus and rest hub.

Table 5 below sets out in summary an inventory of current and emerging visitor experiences by category and how with enhancement these experiences can create meaningful clusters using the blue and green way network unique to this region of Irelands Hidden Heartlands.

TABLE 5 : INVENTORY OF VISITOR EXPERIENCES (CURRENT & EMERGING)

Category	Key Experiences	Potential Enhancements
Water Activities	Cruising, kayaking, paddleboarding, angling	Blueway hub with equipment hire and guided eco-routes
Land Activities	Golf, walking trails, cycling (Old Rail Trail), equestrian centres	Add Yew Point trails and guided heritage walks
Culture & Heritage	Athlone Castle, Clonmacnoise, Rindoon, Luan Gallery	Digital heritage interpretation, thematic routes
Food & Drink	Hotel dining, Athlone restaurants, local producers	Food trails, lakeside dining, pop-up markets
Events & Festivals	Triathlon Ireland series, regattas, cultural festivals	Signature “Lough Ree Festival” combining outdoor sport and arts
Wellness & Nature	Spa, lakeshore, forest walks, Yew Point retreats	Forest bathing, outdoor yoga, eco-accommodation
Families	Lough Key Park, Viking tours, waterparks	Interactive discovery trail network for children

3.4.1 Intercounty Tourism Collaboration & Recommendations

Hodson Bay's reach naturally spans Roscommon, Westmeath and Longford, connecting northward to Leitrim through the Shannon corridor and Offaly to the south. Strengthening intercounty collaboration is essential for cohesive branding and itinerary development. There is already a strong working relationship between the Counties who recognise the value of working across county borders. Further collaborative actions might include:

- Joint Marketing: "Explore Lough Ree" campaign integrating experiences across counties.
- Shared Blueway Management: Coordinated signage, mapping, and maintenance of boating/cycling facilities.
- Destination Clustering: Creation of a "Mid-Shannon Lakes Alliance" linking local authorities, Fáilte Ireland, and enterprise groups.
- Unified Sustainability Framework: Shared environmental standards and habitat restoration goals across the Shannon basin.

Strategic Recommendations

1. Collaborative marketing and promotion - The Destination Athlone Steering and Marketing Groups exists to promote the South Roscommon/Athlone region providing an ideal vehicle for targeted promotion and marketing focusing on the Hodson Bay Waterfront Park and its enhanced, year-round offerings.
2. Invest in connectivity – Develop a seasonal shuttle linking the hotel, marina, Athlone town centre, and greenway trailheads; expand secure cycle-parking and e-bike charging points.
3. Curate signature experiences – Design bookable half-day and full-day itineraries that combine water, heritage, and food, packaged for easy online purchase.
4. Extend the season – Programme off-peak festivals and themed weekends around food, wellness, wildlife, and culture to sustain year-round demand.

5. Enhance sustainability credentials – Position Hodson Bay as an eco-conscious destination through habitat restoration, low-impact activity design, and carbon-offset partnerships—a narrative increasingly important to European travelers.

3.5 Conclusion

The scheme proposed for HBWP is not simply an upgrade of existing facilities but rather a radical re-imaging of its lakeside location as a significant addition to the leisure and tourism offering in the region. It presents added value opportunities for range of visitors and regular users including on and in water access and quality social and leisure amenities.

Hodson Bay's tourism and leisure cluster emerges from a fortunate alignment of natural assets, established hospitality, and strategic location. The adjacent experiences radiating outward - heritage sites, artisan food, biodiversity hotspots - multiply reasons to visit and extend the length of stay. Realising the cluster's full potential requires deliberate coordination: shared branding, connectivity, and curated itineraries that guide visitors through a coherent journey from water to table to heritage to rest. Done well, Hodson Bay can evolve from a lakeside hotel destination into a nationally recognised exemplar of Midlands tourism, demonstrating that Ireland's heartland holds experiences every bit as compelling as its celebrated coasts.

Hodson Bay stands at the intersection of Ireland's most connected inland waterway and road corridor. With the Hodson Bay Hotel, Yew Point, Athlone Golf Club, and the proximity of Athlone town, it forms a natural destination cluster ready to evolve into a comprehensive leisure hub. By integrating the Shannon Blueway, Old Rail Trail, and intercounty partnerships, the area can position itself as the beating heart of Ireland's Hidden Heartlands—offering a seamless mix of wellness, activity, heritage, and nature-based tourism experiences that extend far beyond a single stay.

Clustering, product development, and season extension represents a key opportunity to enhance both visitor numbers and economic impact. In this context, the purpose of the following section is to:

- quantify the scale and characteristics of relevant target markets
- assess the potential demand for an expanded and more integrated tourism offer
- and identify the segments most likely to drive sustainable visitation and revenue.

4. MARKET OPPORTUNITY

This section assesses the scale of market opportunity for an expanded, year-round tourism offer at Hodson Bay. Additional supporting material is provided in Appendix 2.

4.1 Market Context and Opportunity

Building on the analysis of the current position in Section 3, the market opportunity for the HBWP development is defined by the interaction between:

- the scale of accessible visitor markets, and
- the ability of the proposed scheme to address existing gaps in the tourism offer

As identified in the preceding section, while Hodson Bay benefits from a strong location, established activity base, and alignment with national tourism policy, its current offer does not fully capture:

- the potential of its catchment population and the growing tourism markets
- the growing demand for integrated, nature-based experiences
- or the opportunity to extend visitation beyond peak season

In this context, the purpose of the market analysis is not simply to describe existing markets, but to assess:

- the scale and accessibility of target segments
- the extent to which these segments can be activated by an enhanced offer
- and the likely level of demand that can be generated under a more integrated, year-round development models.

The potential market for HBWP comprises a combination of:

- local and regional catchment populations, forming the core base for repeat and year-round visitation
- domestic tourism markets, particularly families and activity-oriented visitors within Ireland’s Hidden Heartlands and wider national catchment
- out-of-state visitors
- and niche segments, including schools, activity groups, and special interest cohorts

These markets vary in scale, frequency of visit, and revenue potential, and are considered in the sections that follow, with further supporting detail provided in Appendix 2. The analysis focuses on quantifying these markets and assessing their relevance to the proposed development, with particular attention to catchment size and accessibility; visitor motivations and behaviour; segment-specific needs and alignment with the proposed offer. This provides the basis for demand modelling and economic assessment in subsequent sections of this report.

4.2 Consumer Insight: Water-Based Experiences[5]

Fáilte Ireland consumer insight research on water-based experiences reinforces the market opportunity for HBWP by highlighting the strong appeal of water as both a core experience and an ancillary feature within a wider destination proposition. Water, rivers and lakes are evocative assets for consumers and can add significantly to the motivation to visit where they are incorporated into the setting, arrival experience, visitor journey or activity programme.

The research identifies three principal emotional benefits associated with water-based and waterside experiences: relaxation, adventure and connection. Cruises, swimming and experiences near water provide a sense of escape, calmness and tranquillity; water-based activities and boat trips create a sense of adventure and stimulation; and experiences in

[5] Fáilte Ireland, Consumer Insights – Water Based Experiences, Consumer Planning & Insights, 2024.

proximity to water allow visitors to feel connected to nature, the wider landscape and the place itself. These findings are directly relevant to Hodson Bay, where the lake setting is not simply a backdrop but a central component of the visitor proposition.

Importantly, the research also distinguishes between experiences in the water and experiences on or near water. While activities such as paddleboarding, kayaking and canoeing have clear appeal, they remain more niche due to consumer concerns around getting wet or cold. By contrast, experiences that allow visitors to enjoy water in a more passive way have broader market appeal. This supports the proposed balance within HBWP between active water participation and more accessible waterside experiences, including promenades, viewing areas, café and plaza spaces, casual walking, boat access, events and lakeside wellness.

This has implications for the positioning of the scheme. The opportunity is not to present HBWP solely as a watersports destination, but as a wider waterfront park that allows different market segments to engage with Lough Ree at varying levels of intensity. Families, older visitors, hotel guests, local residents and international visitors may be attracted primarily by the setting, views, walking routes, café, marina, boat trips and social spaces, while younger and more active segments may be more motivated by the Aquapark, kayaking, SUP, swimming and other programmed water-based activities.

Boat-based experiences are also significant from a market perspective. Consumer research indicates that boat trips can create a sense of anticipation, uniqueness and excitement, particularly where they form part of the arrival or access experience. For Hodson Bay, this supports the role of the marina, tour boats, water taxi potential and links with Athlone as more than transport infrastructure. These elements can form part of the experience itself, creating distinctive views of Lough Ree, opportunities for socialising, and stronger integration between Hodson Bay and the wider Shannon corridor.

The research further highlights the value of walking routes beside water as part of a supporting network of visitor experiences. Waterside walking is associated with scenery, relaxation, socialising and physical and mental wellbeing. This supports the development of flexible, legible and attractive walking routes at Hodson Bay, with opportunities to link movement through the site with food and beverage, cultural programming, interpretation, wellness and nature-based experiences.

Finally, the strong consumer response to wildlife and nature encounters suggests an opportunity to translate Lough Ree's ecological and landscape assets into more structured visitor experiences. While the specific examples in the research relate primarily to marine life, the underlying insight is relevant to Hodson Bay through the potential to highlight lake ecology, birdlife, habitats, islands and seasonal nature experiences. This can add educational and experiential depth to the offer, particularly for families, schools, special interest groups and environmentally motivated visitors.

Overall, these insights strengthen the case for an integrated HBWP offer that combines active water use with passive enjoyment of the lake, year-round promenade use, boat-based access, nature interpretation, wellness and social amenities. This broader proposition is likely to maximise market reach, support repeat visitation and increase dwell time by allowing visitors to engage with the waterfront in multiple ways.

4.3 Summary of Main Markets

The market analysis detailed in Appendix 2 as part of Stage A identifies and assesses the scale of the main target markets, as shown in Table 2 below. The tourism markets include the approximately 94,000 visitors that currently stay in the Hodson Bay Hotel[6], the additional 170,000 approx. who visit the Hotel for events, and the visitors who are on a daytrip by boat from Athlone or elsewhere.

TABLE 6: MAIN TARGET MARKETS

Markets	Population Size
Primary Catchment	270,000
Secondary Catchment	2.1 million+
Domestic Tourists in Westmeath, Roscommon/Longford, Offaly and catchment area of east Galway	711,000
NI Tourists in the rest of IHH	85,000

[6] Source: Consultation with Hodson Bay Hotel.

International Tourists in IHH	357,000
Schools	206,000

These main markets will be the primary source of demand for the various elements of the project, that is:

- the Aquapark and its range of experiences (which currently has max capacity of 1,200[7]),
- the promenade and outdoor spaces,
- the café
- and drop-in/casual activities and events.

They will also be important in generating awareness and positive word-of-mouth promotion for the ongoing programme of water-based and other activities.

As the analysis in Table 8 indicates, the wider secondary catchment area is the most significant market opportunity for the expanded offer. The domestic tourism market is also substantial. As the wider Hidden Heartlands region becomes more established as an international tourism destination, there is also potential for greater numbers of international visitors.

4.4 Segmentation Analysis

As the proposed HBWP is primarily an integrated destination facility, assessing the various segments of the main markets identified above is essential to identifying potential demand and its characteristics. These segments are discussed below.

4.4.1 Domestic Outdoor Activity Participants

Outdoor recreation is a term that encompasses a wide variety of activities and of participation. The Government's National Outdoor Recreation Strategy provides a broad

[7] Source: Consultation with Bay Sports.

list of what can be considered under this heading and is a useful reference when considering the different target markets that may be relevant to HBWP (see Figure 1).

FIGURE 1: TYPES OF OUTDOOR RECREATION[8]

In terms of participation, recreational walking is by far the most popular outdoor activity, with almost three quarters of the Irish adult population participating regularly[9] and the frequency of recreational walking being 4.8 times per week for an average of 50 minutes[10]. On this basis, recreational walking can be considered part of the mainstream

[8] Embracing Ireland's Outdoors: National Outdoor Recreation Strategy 2023-2027
[9] 71% of the adult population participated in recreational walking at least once in the previous seven days according to the 2024 Irish Sports Monitor, Sport Ireland.
[10] Irish Sports Monitor 2022, Sport Ireland

markets and a significant market opportunity that can be cultivated with careful planning with appropriately planned and attractive trails and walks.

Other forms of recreation attract much lower participation rates, with swimming and cycling being the most popular, after 'personal exercise'. Using the penetration rates of the various sports from the Irish Sports Monitor and applying them to the overall catchment population statistics in Table 3 we can identify the approximate number of individual niche activity participants in the wider Hodson Bay area.

TABLE 7: MAIN TARGET MARKETS

Markets	Population Size
Catchment	2.4 million
Domestic Tourists in Westmeath, Roscommon/Longford, Offaly and catchment area of east Galway	711,000
Total	2.4 million
Of which...	
- Swimming (both indoor & outdoor) 8%	192,000
- Running 7%	168,000
- Cycling 5%	120,000
- Yoga 3%	72,000

Converting these niche opportunities to actual business will be a function of:

- the attractiveness of the final concept and design;
- spatial allocations;
- marketing of the site and its amenities;
- the business-development drive and professionalism of activity providers.

4.4.2 Adventure Tourism

Adventure tourism can be broadly classified as a trip that combines two of the following three elements:

- Interaction with nature
- Interaction with culture
- An outdoor activity

It is identified by Fáilte Ireland as one of the fastest growing and most exciting sectors of Irish Tourism[11], and it works closely with Ireland's Association for Adventure Tourism (IAAT) for its development and promotion. The IAAT itself identifies at least 59 different types of activities that can be classified as adventure tourism[12]. Of these, the activities that relate specifically to the water are most relevant to HBWP - and particularly paddle sports.

Paddle Sports in Ireland

Although still a niche market, paddle sports is an area of increasing participation. Canoeing Ireland is the national body for paddle sports[13], including kayaking, canoeing and SUPping. It estimates that there are approximately 5,000 active paddlers in Ireland, of which 3,000 are members of Canoeing Ireland, the majority of whom are members of a club (80%)[14]. Over two thirds of members are adult (69%) and almost three quarters are male (72%)[15], with a concerted push nationally to increase the number of female paddlers[16].

In its most recent published profiling of the canoeing/kayaking market in Ireland, it presented the following overview:

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[11] https://www.failteireland.ie/Product-development/Activities.aspx
[12] https://iaat.ie/about-us/membership/
[13] It is worth nothing that the strategic objectives and goals of Canoeing Ireland include increasing the number of Paddle Places in Ireland, being recognised as a lead advisor on waterway infrastructure and developing a Canoeing Ireland Infrastructure Strategy - all of which are relevant in the context of developing the Hodson Bay. Canoeing Ireland Strategic Plan 2024-27.
[14] Canoeing Ireland Strategic Plan 2015-2020— Working Document
[15] Ibid.
[16] Canoeing Ireland's Bridge the Gap initiative.

"Outside of the existing Canoeing Ireland membership structure there are approximately 150 activity providers who deliver Canoeing and Kayaking activity professionally. These activity providers include the 12state-run Outdoor Education Centres, a small number of large private Adventure Centres and numerous smaller businesses. The providers nationally introduce approximately 100,000 to canoeing annually, primarily through school and junior activity programmes."

While the number of regular paddlers in Ireland remains a relatively small and a niche market, there is clearly potential not only for providing facilities and services for committed participants but also for introductory and occasional experiences. Bay Sports currently has capacity for 60-100 kayaks/SUPs daily.

4.4.3 Visitors Arriving by Boat

An important factor in assessing the markets for the proposed redevelopment of HBWP is the arrival of visitors by boat. These visitors can broadly be classified into two segments, and they form a distinct market in their own right.

- Visitors on boat tours, e.g. the Viking Boat tour that currently operates between Athlone and Hodson Bay, who will benefit from expanded and enhanced mooring and facilities and upgraded tour boat. This market is estimated at approximately 40,000[17].

- Cruising visitors, either in a hire or their own cruiser, who will take advantage of the enhanced marina and other amenities. A 2023 report[18] on the HBWP project suggested potential of 19,200 marina visitors.

4.4.4 Special Interest Groups

There are a number of different types of groups in Ireland, with the common denominator between them being the desire to participate in a shared activity or to connect socially through shared excursions and activities. A summary of some of the main market

[17] Feedback from consultation with tour boat operator.
[18] Appendix 1 - Hodson Bay Constraints Study and Preferred Options Report, 2023, SLR

opportunities and their scale is as follows, indicating a range of markets that can be tapped into for an expanded range of amenities at HBWP.

- There are an estimated 865 walking clubs in Ireland[19].

- Cycling Ireland has a membership of about 500 cycling clubs and over 26,000 members.

- Active Retirement Ireland has over 550 local associations and over 24,500 members[20].

- Irish Men's Sheds Association, with over 450 associations and new ones registering at a rate of one a week[21].

- Scouting Ireland has over 26,500 members aged between 6 and 25 and 10,000 volunteers[22].

4.4.5 Visitors with Disabilities

As the expanded HBWP facilities are being designed to be accessible for all, it will be attractive as a destination for visitors with disabilities and for related groups organising shared outings.

This is a sizeable segment, with an estimated one in five of the Irish population having some form of disability[23] and with 2499 organisations signed up to the Sport Inclusion Disability Charter[24]. More specifically, estimates for how the number that would need a Changing Places facilities in Ireland are between 17,000 and almost 38,000[25].Some of the

[19] www.getirelandwalking.ie
[20] https://activeirl.ie/ari-mission/
[21] https://menssheds.ie/
[22] https://www.scouts.ie/
[23] Disability Statistics Factsheet May 2024, National Disability Authority
[24] https://activedisability.ie/sport-inclusion-disability-charter/
[25] Estimated number of potential users of Changing Places Toilets in Ireland, June 2021, National Disability Authority

key Irish organisations that are relevant from the perspective of offering active pursuits are:

- Irish Wheelchair Association has over 20,000 members, and there are an estimated 40,000 wheelchair users in Ireland[26].
- Caring and Sharing Association has 20 groups nationwide[27].
- Enable Ireland provides services to over 13,000 individuals and their families[28].
- Family Carers Ireland has a database of over 30,000 active users of its services[29].

4.5 Segments: Needs & Alignment with Expanded Hodson Bay Offer

In order to assess the opportunity that each of the main markets and segments offers, a review of their needs and how they align with the core elements of an expanded HBWP experience is provided in Table 8 below.

[26] Dr. Rosie Gowran, Lecturer in Occupational Therapy, University of Limerick.
[27] https://casa.ie/
[28] https://enableireland.ie/about-enable-ireland
[29] https://www.familycarers.ie

TABLE 8 NEEDS & ALIGNMENT OF TARGET MARKETS[30]

Segment	Broad Needs	Alignment with Expanded HBWP Amenities
Catchment Population	General needs include: - opportunities to share time with friends and family; - rest/recharging; - opportunities to engage in physical activities; - learning and education. Specific segments within the local catchment have particular needs: - families with pre-school children seek opportunities to share with other parents with young children in an active context (6% of the immediate catchment is under 5 years); - children and youth seek opportunities to engage in shared, new and/or favourite pursuits (21% of the immediate catchment is aged 5-19 years); - full-time workers seek time out from work to de-stress and exercise; - under or unemployed seek free or low-cost opportunities for learning and socialising; - retirees seek opportunities for socialising and exercise (9% of the immediate catchment is aged 65-74)	The expanded outdoor spaces, including the promenade and the café, will provide an opportunity for the catchment population to socialise, rest and recharge. The Aquapark will remain a popular destination for the wider catchment population, as already attested to by the experience of Bay Sports. The provision of a permanent and year-round watersports pavilion and the indoor spaces suitable for wellness classes and other events will offer additional opportunities to socialise, exercise and learn beyond the main summer season. Tailored programmes catering to specific segments of the population and to particular times of the year will address the specific needs of families, children/youth, retirees, etc.

[30] Sources: Population data from CSO Census 2022; Fáilte Ireland segmentation information from Ireland's Hidden Heartlands Regional Tourism Development Strategy 2023-2027; international tourism segmentation from Tourism Ireland' Island of Ireland Overseas Marketing Segmentation.

Segment	Broad Needs	Alignment with Expanded HBWP Amenities
Domestic Tourists	Fáilte Ireland's research indicates that the primary motivations for domestic trips to Ireland's Hidden Heartlands are: - bonding, i.e. the nurturing of relationships with family and others who are close; - social energy, i.e. enjoying the vibrancy of a place; - adventure, i.e. participation in outdoor activities that are beyond the comfort zone. Their needs are therefore broadly similar to those of the catchment population.	The provision of an expanded watersports facility with supporting f&b and boat trips will create an attractive destination for domestic tourists as it will offer opportunities to bond and participate in outdoor adventure.
International Tourists	Tourism Ireland identifies 'Enrichment Explorers' as the largest global segment. Some of its main interests when travelling are: - to experience the vibrancy and character of a place; - to broaden the mind; - to feel connected to nature; - scenic views and culture; - to travel off the beaten track. Authenticity, warmth and nature are important, although the majority are not highly active.	The proposed concept for HBWP is less likely to meet the needs of this market than of others, as international tourists are generally more motivated by culture and heritage. However, the enhanced lakeside areas and opportunities for boat trips - supported by easy parking and f&b - may appeal to a proportion of this market staying and touring in the area.

Segment	Broad Needs	Alignment with Expanded HBWP Amenities
Schools & Youth Groups	Schools are continually looking for destinations that can offer exciting activities for school outings for students of all ages. For younger students, drive time tends to be shorter, and more staff support required. Daytrips for older students can be up to 90mins drive. Youth groups seek destinations that can provide activities aligned with their core purpose, e.g. socialising, outdoor activity. Both cohorts require: - experienced staff to lead and teach - equipment/gear hire - changing facilities - spaces to eat and socialise	The permanent and expanded watersports pavilion will provide more and year-round opportunities for schools and youth groups, including transition year and senior cycle programmes, e.g. leadership, environmental, personal development. The additional indoor space will create an opportunity to develop expanded programmes that encompass additional elements beyond water-based activities.
Dedicated Water Based Activity Participants	Those for whom a specific watersport is a hobby will seek opportunities to practice and learn, both individually and as part of a group. They require supports suitable for their activity, including: - easy access to the water to launch own equipment; - equipment/gear hire for those who don't have their own; - changing facilities; - opportunities to expand their skill through dedicated lessons and programmes.	The provision of an expanded watersports facility with supporting f&b and improved amenities will create an attractive destination for regular and occasional watersports enthusiasts.

Segment	Broad Needs	Alignment with Expanded HBWP Amenities
People with Disabilities	The needs of this cohort vary depending on the nature of the disability. Generally, they require: - fully accessible spaces and suitable parking/drop off points; - specialist support amenities, including toilets and shower; - specialist equipment and suitable launch areas to enable access to and from the water; - support of knowledgeable and experienced staff; - suitable safety and information material; - dedicated programmes.	The proposal to develop amenities and spaces to be fully accessible will create a very attractive destination for the more active segments of this market.
Special Interest Groups	Generally, groups require: - opportunities for shared activities relevant to the specific needs of the group, whether talks, events, outdoor activities or other; - indoor spaces that are sufficiently large to accommodate them, including f&b; - suitable coach parking, including appropriate drop-off location for groups with older and possibly less mobile participants. For activity groups, including walking and cycling clubs, supports for their chosen activity are important, e.g. secure and sheltered bike parking, access to air and water, associated retail, basic first aid, and f&b.	The expanded outdoor and indoor amenities and spaces will create an attractive opportunity for special interest groups to pursue their interests and to socialise. For walking and cycling clubs, the proximity of the HBWP hub to the Greenway will create an attractive stop-off point or destination.

4.6 Visitor Profile: Summary of Primary Research

In order to determine visitor profile and engagement in advance of the development of the Hodson Bay Waterfront Park, RED C was commissioned to undertake primary research. The research took the approach of face-to-face interviews with adults aged over 18 years, at Hodson Bay Harbour, Hodson Bay Hotel and in the watersports centre. The fieldwork took place during June, August, September and October/November 2025, with the watersports not included in the research during the final phase. A total of 824 interviews took place.

The following are key findings in relation to understanding the market potential and its characteristics. Findings related to design are integrated into other elements of the overall project, and a full report of findings is available separately.

- The market breakdown[31] of interviewees was as follows:

    - 66% Republic of Ireland
    - 10% Northern Ireland
    - 16% England/Scotland
    - 9% Other Overseas

- The out-of-state proportion of interviewees peaked during the summer, accounting for almost half of those interviewed in August. (Again, it must be remembered that only adults aged 18+ were interviewed and the core market for BaySports is under 18s).

- Over a quarter were travelling as part of a family, and 38% as a couple.

[31] Note, this is a breakdown of interviewees and should not be assumed to be a reliable basis for estimating market distribution of visitors to Hodson Bay as a whole, either currently or in the future.

- Irish interviewees travelled from quite a long distance, indicating a broad catchment area. While 22% were from Roscommon or Westmeath, 16% were from Dublin and the remainder from a variety of other counties ranging from Armagh to Mayo to Cork.

- The majority of interviewees travelled to Hodson Bay by private car, with 13% using a rental car and 3% arriving by boat.

- Key motivations for visiting Hodson Bay included:

  - Spending time with family / friends: 20% of domestic and 27% of international interviewees;
  - To visit or stay in the Hodson Bay Hotel: 17% of all interviewees;
  - To take part in watersports: 14% of domestic and 9% of international interviewees;
  - To go for a walk/stroll: 12% of domestic and 6% of international interviewees;
  - To visit the marina: 10% of domestic and 15% of international interviewees.

- The majority (85%) of interviewees spent money during their visit to Hodson Bay, and the majority of this was on food and drink in the hotel (86%).

- 3 in 4 agree the upgrade of Waterfront facilities is a good idea: passive aspects of the development (walkways) appeal most to those aged over 55 years while development of water sports appeals most to those 18-34 years.

- The proposed development influences people's likelihood to stay during both peak and off-peak seasons, with a stronger effect during peak season, and most notably for the domestic market.

5. DEMAND ANALYSIS & PROJECTION

5.1 Factors that Influence Demand

Assessing the level of demand a business or facility can expect to attract is not an exact science. A variety of factors influence demand - some of which are within the control of the business/facility and others which are not. These include the following.

1. The scale of potential target markets. The larger the markets, the greater the potential for higher levels of demand.

2. Location and access. This is connected with the point above as a site located close to, and readily accessible from, large urban centres naturally have a larger audience to tap into than those that are more remote.

3. Competitors/Comparators. The existence of direct competitors within the wider area will naturally dilute potential demand, while the experience of comparators will help to inform the shaping of the offer.

4. Broad Appeal. A facility or business that appeals to a wider variety of consumers can hope to attract higher levels of demand than those with a narrower focus.

5. Size of the facility. A destination-level attractor that can provide hours of entertainment/experiences for consumers will attract visitors from a wider area as the longer dwell time makes it worth the additional travel time.

6. Suitability for Repeat Business. The opportunity to generate loyal and repeat business supports long-term viability.

7. Quality. High quality in all areas is essential in encouraging positive word of mouth promotion and repeat business. This includes the quality of the experience, the presentation, delivery, accessibility and service.

8. Marketing is essential in developing awareness and interest among target consumers.

9. Professionalism and drive of the Management Team. The management team will be responsible for financial viability, for driving the business, and for ensuring the delivery of all aspects of the consumer experience are of a consistently high quality.

The first three factors above - and particularly the first two - are outside the control of HBWP. Factors 4-7 are critical considerations in the finalisation of the concept, and factors 8 and 9 will come into play as the site becomes operational.

5.2 Estimating Potential Demand

An established approach to estimating potential demand for a tourism venture is to establish the scale of target markets and segments - as outlined elsewhere in the report - and to apply penetration rates to these markets. This approach is appropriate to estimate general visitor numbers which is then refined by benchmarking against comparators. The penetration rates used are conservative and there is potential for higher penetration rates as the destination becomes well established and the offer matures in line with market needs.

Having considered the scale and characteristics of the various potential audiences for the spaces and experiences at HBWP, applying appropriate penetration rates assists in assessing potential overall demand / footfall levels. Table 8 presents this assessment, with more detailed explanations of the penetration rates and factors used for repeat visits discussed below. It suggests potential demand in the region of 168,000 when fully operational. Benchmarking against comparators will assist in testing the realisability of this estimate - see overleaf and subsequent Table 9.

TABLE 9: ASSESSING OVERALL GENERAL DEMAND USING PENETRATION RATES

Markets	Population Size	Low Penetration Rate	High Penetration Rate	Average Demand Potential	x Repeat Visits
Primary Catchment	270,000	1%	3%	5400	64800
Secondary Catchment	2.1 million+	0.25%	0.75%	10500	31500
Domestic Tourists in Westmeath, Roscommon/Longford, Offaly and catchment area of east Galway	711,000	1%	3%	14220	14220
NI & International Tourists in IHH	442000	1%	1%	8840	8840
Marina & Boat Tour Visitors	-	-		49,200	49,200
TOTAL				88160	168560

Notes to accompany Table 9:

- Low penetration rates are used for the catchment population and domestic tourism on the basis that - from the perspective of the general population - there are other opportunities for socialising and nature-based recreation in the wider area and participation in water-based activities remains a niche activity.

- The type of experience, despite the general attractiveness of Lough Ree, is less likely to appeal to international tourists than experiences that are more directly connected to history and heritage. As with the previous point, the low penetration rates used for this market reflect this fact.

- However, recreational opportunities are a significant draw for local populations - especially when combined with f&b and easy parking. There is potential to develop regular repeat business from those living in close proximity to Hodson Bay for the aquapark, water-based activities, saunas and waterside relaxation. On that basis, the following repeat factors are applied:

- Primary catchment: assume 1 visit per month year-round, giving an overall factor of x12 visits per annum per visitor. This assumes regular but not necessarily monthly participation across a range of activities.

- The secondary catchment: assume three visits per annum, giving an overall factor of x3 visits per annum per visitors.

- Tourists are assumed to visit only once, given the nature of their travel.

While the proposed concept for the HBWP does not have a direct comparator in Ireland - considering both the type of experience/amenity to be offered and its location - reviewing demand levels at sites in rural areas that are used regularly by local communities for recreational walking can provide useful benchmarks. In this context, four have been selected - see Table 9 Belvedere Demesne has been included due to it having a lakeside setting, as is the case with Hodson Bay, and due to its popularity with the local community as a general social amenity. There is evidence from other parkland sites with historic houses - e.g. Emo, Castletown - that the dominant visitation pattern is local residents using the sites as a general amenity, with the historic house rarely featuring as part of the visit[32]. As a result, these sites can provide useful benchmarks in gauging visitor levels for rural locations that have strong domestic recreational aspects to them - with the evidence being that they can attract upwards of 160,000 visitors per annum. A fifth comparator has been included - Lough Key Forest Park - although the offer is also somewhat different and there is accommodation on site. Its experience of attracting up 150,000 visitors also provides a useful benchmark. It is also further away from the significantly large Dublin market

[32] Ref. OPW data for ticketed and non-ticketed visitors at historic demesnes.

TABLE 10: BENCHMARKING COMPARATORS[33]

Comparator	Population Within 10kms	Visitor Numbers 2024
Killykeen Forest Park, Co. Cavan	26,844	103,000
Portumna Forest Park, Co. Galway	9,354	45,149
Glenbarrow Trails, Co. Laois	15,252	51,685
Belvedere Demesne, Co. Westmeath	36,654	161,010
Lough Key Forest Park	10,741	120,00 - 150,000

5.3 Outlining a Potential Growth Path

Attractions and experiences generally take a number of years to reach the potential that is identified for them from the time they are fully operational, with marketing a key factor in stimulating demand, particularly in the early years.

In addition, the proportions of demand accounted for by the domestic and out-of-state visitor markets usually changes over time, as it can take time for awareness to build among non-local audiences.

It is common for demand from local residents for a new visitor experience to peak within the first three years as curiosity stimulates initial demand but then plateaus after that as peak penetration of the market population is reached. Demand from tourism markets especially international markets - increase at a more gradual rate.

In addition, the development of the HBWP will take place on a phased basis with delivery of access and marina elements taking place initially, followed by place-making and finally the provision of the new watersports pavilion.

[33] Source for forest park data: Provision and Management of Recreation Facilities and Infrastructure 2024, Coillte. Source for population data: CSO Census 2022. Source for Belvedere data: Westmeath County Council.

On this basis, a growth path for the HBWP such as that outlined in Table 10 can be considered. Year 1 is aligned with the first year of the site being fully operational and all works delivered and is conservatively estimated close to existing demand levels. Growth is strong in the initial years, then slows to a more modest level in later years as population, site and competition may become constraining factors.

TABLE 11: PROJECTED GROWTH PATH FOR THE HBWP

Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
100,000	114,000	130,000	148,000	168,000	171,360	174,787	178,283	181,849	185,486

5.4 Additionality

Overall demand levels at Hodson Bay are not currently measured. Where commercial operations are currently in place - Baysports' Aquapark's offers, the sauna, food truck, Viking boat tours, etc. - insight into demand levels are possible, as discussed elsewhere in this report. These include an estimate of approximately 40,000 for the Aquapark and a similar number on the Viking boat tours. Considering the projected demand outlined above and the discussion in Section 3 with regard to current operations on site, a number of points can be made in relation to the additionality resulting from the proposed project.

- The projected demand of 168,000 is significantly in excess of the current combined demand levels of both the Aquapark and Viking boat tours combined (approximately 80,000).

- Both operations are operating below capacity at the moment and the development of a new leisure destination with multiple components will support higher levels of demand and expansion of capacity.

- Additionality also needs to be considered in a broader context than simply visitor numbers. For example, boat trippers currently have little incentive to disembark at Hodson Bay, but the development of a new recreation and leisure destination will provide an opportunity to capture more of the value of this 'passing' traffic as well as enhancing the experience for visitors.

- Finally, the overall project provides for a high-quality and integrated experience that offers an opportunity to extend dwell time in an under-visited area of Ireland and adds to visitors' overall satisfaction with their holiday.

The subject of additionality is also relevant when considering economic benefits - see Section 8.4.

6. GOVERNANCE, OPERATIONS & STAFFING

The realisation of projected demand will depend, in part, on appropriate operational and governance structures. These are discussed in this section.

6.1 Identifying a Suitable Approach to Governance & Operations

Factors to consider in identifying the most suitable governance and operational model for HBWP include the following:

- Will the asset continue to be owned by Roscommon County Council?
- Who will carry the operating risk?
- What oversight is required, i.e. public or independent?
- Is there an ambition to source public or philanthropic funding?
- Is there an ambition to generate revenue?
- What operational agility is required?
- Is there a requirement to include multiple stakeholders and/or external operators in the model?
- Are there other assets that could be integrated under one model?

There are several approaches that Roscommon County Council can adopt for the oversight and management of HBWP:

1. Direct by the local authority
2. Via a wholly owned subsidiary
3. Partnership/lease with a non-profit
4. License/contract with a third-party operator
5. Joint management with another state entity (using one of the previous four approaches)

These are discussed in more detail in Table 10 below.

TABLE 12: OPTIONS FOR GOVERNANCE & OPERATIONAL MODEL FOR HODSON BAY

Approach	Overview & Considerations	Advantages	Disadvantages
1. Direct by RCC	Direct governance and management through an in-house unit or steering group. This can work well for a small asset that is simple to manage (e.g. Clondalkin Round Tower, which is directly managed by South Dublin County Council), or which is inherently integrated into local authority services.	• High control • Allows for the allocation and movement of staff and resources between the local authority and the asset.	• The local authority carries all the risk. • Local authorities typically lack the skills and expertise to manage an amenity or asset directly. • Less agile and commercial than other approaches.
2. Wholly Owned Subsidiary	Establishment or utilisation of an existing entity, e.g. DAC, CLG. This is an approach used by many local authorities, e.g. Cliffs of Moher, Waterford Treasures, Discover Limerick.	• Enables more professional management and commercial flexibility while still providing for local authority control. • Limits liability and protects core asset. • Good fit for accessing public funds.	• If the most appropriate vehicle is not selected, it can limit options in the medium to long term, e.g. DAC v. CLG.

Approach	Overview & Considerations	Advantages	Disadvantages
3. Partnership/Lease to Non-Profit	This gives control to an invested non-profit, such as a community, heritage or sports entity, e.g. Kilkenny Civic Trust management of Kilkenny Medieval Mile Museum.	• A good fit to access philanthropic and charitable grants, and tax reliefs. • Specialist knowledge may be an advantage in operations.	• There may be a lack of alignment between the charitable aims of the Non-Profit and the strategic objectives of the local authority. • Potential lack of commerciality. • Possibly less agile due to necessity to comply with the Charities Governance Code.
4. Licensed/Contracted Operator	The contracting of a third-party operator to manage the asset, e.g. Aramark at Malahide Castle.	• Potential for an operator with previous experience that would enhance the sustainability of the asset. • Enables more professional management and commercial flexibility while still providing for local authority control through the specifications of the contract. • Removes operational risk from local authority and protects core asset. • High agility.	• May limit potential for funding if operator is commercially driven. • Limited influence by local authority over day-to-day operations. • Need to ensure license/contract is carefully developed and oversight is maintained in its delivery.

Approach	Overview & Considerations	Advantages	Disadvantages
5. Joint Venture / Management with State Entity	A further option which can be included in any of the previous is joint management - directly or indirectly - with another state entity. In the case of HBWP, a potential partner may be Waterways Ireland. A similar model is that in place for Lough Key Forest Park with Coillte.	A key advantage is the ongoing strategic and operational relationship between the partners to the wider benefit of the asset and its sustainability. Other advantages are as outlined for the previous options.	• Limits liability and protects core asset.

The most suitable approach for Roscommon County Council to take would protect the core asset and maximise commerciality and operational agility, while simplifying procedures and minimising risk.

The use of a subsidiary - either existing or new - appears to offer the best approach and provides several advantages, including greater commerciality, operational agility and potential to apply for funding. In terms of legal format, DAC or CLG appear to be the most suitable vehicles, with DACs being used by a number of other local authorities - some of which are responsible for several local authority assets, e.g. Discover Limerick DAC.

Several refinements could be made to this model by including one or both of the following elements.

- The inclusion of a state entity - most likely Waterways Ireland - on the Board of the wholly owned subsidiary.

- The licensing by the entity of elements of the site to third party operator or operators.

Should the above be included, the approach would resemble that taken at Lough Key Forest Park, for which Moylurg Rockingham DAC was established as a separate joint venture entity by Coillte and Roscommon County Council._The ownership of the asset would remain with Roscommon County Council.

6.2 Recommend Approach

The recommended approach for the governance and operational model for HBWP involves the use of a subsidiary and the sub-contracting by that entity of an operator or operators. Figures 2 & 3 illustrate the two main approaches - the first is the direct sub-contracting by the entity of multiple operators, while the second provides for a single operator who then takes responsibility for further subcontracts. If a suitable single operator can be found to take responsibility for the commercial operation of the entire site, that would be preferable as it would streamline operations. It is expected that this would be the case as the competitive marketplace for this type of offer has been increasing in recent years, resulting in a small but growing number of operators with suitable experience.

FIGURE 2: GOVERNANCE AND OPERATIONAL MODEL FOR HBWP
- DIRECT CONTRACTING OF MULTIPLE OPERATORS

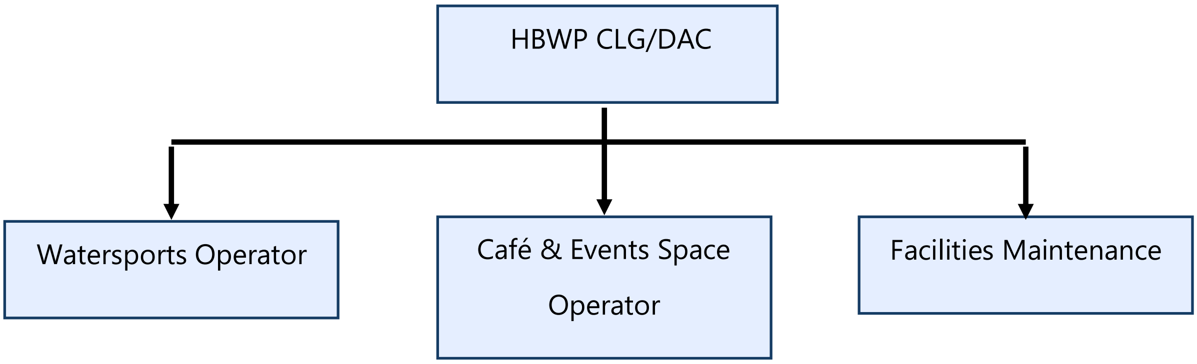
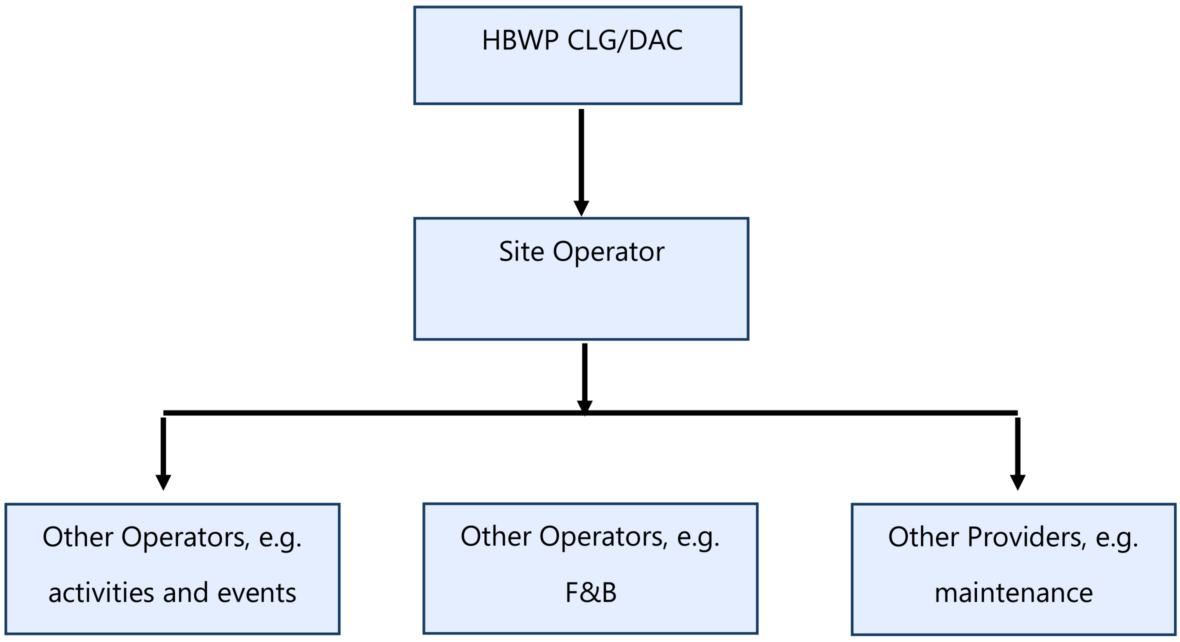


FIGURE 3: GOVERNANCE AND OPERATIONAL MODEL FOR HBWP
- SINGLE OPERATOR RESPONSIBLE FOR SUBCONTRACTING



In more detail, the roles and responsibilities of each element of these models are as follows:

The subsidiary (DAC/CLG) is the entity that has responsibility for overall governance and strategic direction of the site. It consists of a Board - see below - and has responsibility for contracting either a single operator to manage the site or multiple operators. There is scope for this to be an entity that is created specifically for HBWP or for it be a broader county-wide vehicle that could also provide governance and strategic direction for a portfolio of assets, as is the case with Discover Limerick. In either case, a Service Level Agreement between Roscommon County Council and the subsidiary would provide clarity in relation to responsibilities and performance.

Its Board will include Roscommon County Council, and possibly Waterways Ireland. Its members should bring essential skills in the areas of tourism, finance, management, marketing, watersports, community engagement, HR. Its remit should be clearly articulated. A separate stakeholder advisory group can be established to represent other important stakeholders, such as the Hotel, the Golf Club and local residents, but if these are included on the Board itself there is a risk of conflicting agenda and of Board time being allocated to stakeholder issues. While the purpose of this advisory group will be the operational aspects of the HBWP, consideration should be given to any areas of overlap or opportunities for collaboration with the Destination Athlone Steering and Marketing Groups.

The operator will be responsible for the operation of, and further contracting of additional operators, for: the water sports pavilion; aquapark; watersports and all associated water based and leisure activities, including ongoing watersports tuition; sauna facilities; the café and any mobile/pop-up f&b; facility/grounds management, maintenance and security. It has responsibility, in consultation with RCC, for the development and delivery of a year-round programme of activities and events that take place in the indoor café and outdoor spaces. It will also be responsible for the appropriate staffing associated with these functions and spaces. The operator will carry the commercial risk for operations.

The specific details of the above will be the subject of licenses/contracts, which should include a requirement to produce and implement: an agreed marketing plan and budget; community engagement plan; visitor data collection and sharing (with a view to supporting the development of county/regional tourism marketing plans); clear protocols with regard to staffing, training and customer services.

7. SUMMARY ASSESSMENT OF REVENUE POTENTIAL

Revenue potential is closely linked not only to visitor numbers, but to the ability of the scheme to increase dwell time, encourage multi-activity participation, and capture ancillary spend. The assessment in this section provides an understanding of the main drivers of revenue for operators responsible for the delivery of a variety of public services and experiences at HBWP. It is understood that this revenue will not accrue directly to RCC.

An alternative approach to that used here would be to model revenue to RCC itself based on a potential licence fee. For example, a licence fee set at 12.5%-15% of gross revenue could yield between approximately €360,000 - €433,000 from the operation of the aquapark and café alone, assuming revenue of €2.9m (see Table 11). A hybrid model could include a minimum guaranteed licence fee combined with a lower percentage of gross revenue or a percentage of gross revenue above a certain threshold. The purpose of the fee would be to contribute to the maintenance of the asset.

7.1 Sources of Revenue

The draft design proposals for the HBWP include a wide variety of inside and outside spaces that will provide for a wide range of uses. Many of these are free-to-access and will form the basis of an attractive destination for local residents and visitors alike. The opportunity to spend time alone or with loved ones in natural and attractive surroundings, or to participate in an activity that supports health and wellbeing, are strong drivers of footfall.

The new watersports pavilion and extended food and beverage offer will act as an anchor site that enhances HBWP's reputation as an attractive year-round leisure destination, extending dwell time for a range of day visitors, including:

- groups, both current and future
- visitors arriving by boat, with potential for greater boat access provided by the enhanced facilities
- adventure tourists, including individuals, families and groups
- participants in wellness activities
- residents and community making use of the spaces as a cultural, leisure and social destination

The proposed new developments will offer expanded opportunities to provide paid-for experiences and services on a year-round basis - with the free-to-access spaces helping to drive demand for revenue-generating activities. These latter will be provided by contracted operators, as discussed elsewhere under the assessment of options for governance and operations. As a result, final financial projections to be developed as part of a business plan for the overall operation of the site will include line items that relate to license fees from third party operators rather than revenue streams from individual activities.

However, it can be useful at this stage to assess revenue potential based on the range of activities that could be offered as a basis for decision-making and further discussions. Table 11 identifies a range of paid-for activities that could be offered at the HBWP, along with method of delivery and seasonality - the latter being an important component in determining revenue potential.

TABLE 13: POTENTIAL REVENUE-GENERATING ACTIVITIES AT HBWP

Revenue-Generating Activities	Seasonality	Method of Delivery
Paddle Sports (group classes, training and individual hires)	Year round	Contracted operator
AquaPark	Apr-Sept	Contracted operator
Sauna	Year round	Direct bookings via contracted operator
Wellness & Social Classes	Sept-Mar (inside) May-Sept (outside)	Providers booking via contracted operator
Events (fairs/markets)	Year round	Contracted operator
Private venue hire	Oct-Apr	Direct booking via facility operator
Food & Beverage	Year round	Contracted operator

For the purposes of this assessment, a number of potential revenue-generating activities have been excluded. These are public showers and changing facilities; retail; and car parking. It is assumed that revenue from showers/changing facilities will accrue to Waterways Ireland through their SMART card system. Retail is assumed to be a function of the watersports and f&b operator/s. Finally, the client will need to decide whether there should be a parking charge and, if so, how that might operate, e.g. free for those who make a purchase.

There are also niche opportunities not specifically identified in any of the categories above, but which can - for the most part - be considered to fall within one of these categories. They include other water-based activities and events, seasonal events, activities for specific segments of the population (parents, children, special needs, etc.).

7.2 Assessing Revenue Potential

In addition to identifying the channels through which revenue can accrue (Table 11 above), the assessment of potential revenue also requires establishing a number of other elements. Most important of these are the following.

- Operational hours/seasons. Some activities are naturally curtailed by the season, the main example of which is the aquapark but also the limited daylight available in the winter to participate in outdoor activities in the evenings. Other activities are curtailed by factors such as the timing of school holidays and the seasonality of the tourism market. All of this influence the hours, days and seasons that the activities at Hodson Bay can operate - or should operate in order to remain viable.

- Pricing is a crucial element in the revenue mix - pricing to remain attractive to potential customers and setting prices to ensure financial sustainability. For the purposes of this assessment, benchmark prices have been identified and used.

- Likely utilisation/participation rates. Capacity is an important consideration in this context, and the draft designs have been used as a basis for capacity. But it is one thing having capacity and another to fill that capacity to its maximum. Utilisation rates will vary with time of day, of week and of year, and average rates have been developed for this assessment that consider the type of activity and typical patterns of participation.

As some of the activities are already ongoing at the location - the aquapark, sauna and paddle sports, for example - the pricing, seasonality and capacity used in the assessment are primarily drawn from existing operator data. For other activities, they are informed by typical pricing based on the comparator/operator review undertaken and average demand for similar events elsewhere.

The results of the assessment of revenue potential are shown in Table 12.

TABLE 14: ASSESSING REVENUE POTENTIAL FOR HODSON BAY MARINA PARK

Activity	Months	Sessions per Week	No. of Sessions per Annum	Avg. Price per Session	Total Capacity	Utilisation Rate	Total Visitors	Avg. Total Revenue
Aqua Park	Apr-Sept	N/A	N/A	€23.50	N/A	N/A	80,000	€1,880,000
Paddle Sports, peak season	May-Sept	42	882	€18.75	70	50.0%	30,870	€578,813
Paddle Sports, off peak	Oct-Apr	15	435	€18.75	50	35%	7,613	€142,734
Sauna	All year	60	2880	€15.00	23	30.0%	19,872	€298,080
Wellness Classes, indoor (yoga, meditation, pilates, etc.)	Sept-May	5	175	€10.00	25	90.0%	3,938	€39,375
Wellness Classes, outdoor (yoga, meditation, pilates, etc.)	June-Aug	5	65	€10.00	25	90.0%	1,463	€14,625
Social Events (e.g. 'paint and sip', book clubs, craft, other)	All year	3	144	€10.00	30	75%	3,240	€32,400
Events (indoor / outdoor) - see explanatory note	All year	1	48	€80.00	20	100%	960	€76,800
Food & Beverage	All year	N/A	N/A	€5.96	N/A		168,600	€1,004,856
Private Venue hire	Oct-Apr	1	29	€300.00	N/A	N/A	N/A	€8,700
Total Revenue								4,076,383

Notes:
- AquaPark price used is child fee per hour (to also accommodate reduction in price for multi-activity
packages); total visitors based on maximum peak previously demonstrated by Baysports
- Kayak/SUP hire price is based on average between single and double rental

(€20/€35 = €18.75) and this is
used to apply to all paddle sports units (e.g. SUP, or other)
- Sauna: based on larger capacity sauna (ref. Hot Box)
- F&B based on AVEA non-Dublin average f&b spend, applied to overall visitor numbers as elaborated in
Section 5
- Events: market income is based on stall holder rental fees; average fee used is at the low end, for
non-food/craft from DLRCoCo

Note: Visitor numbers in this table should not be totaled as it would result in double counting.

One necessary caveat with assessing revenue potential in this way is that it does not take account of the cost of providing the services, including employment, overheads and equipment. To take the aquapark as an obvious example - while the revenue potential is substantial, the accompanying staff and equipment costs are also likely to be high when compared to, say, operating a sauna. A sensitivity analysis undertaken on the revenue modelling (see Appendix 3) above indicates the following:

- A 20% reduction in visitor numbers across all activities and areas would result in a lower average total revenue yield of almost €3.3m

- Similarly, a 20% reduction in yield results in a total revenue yield of €3.3m

Any operator considering a contract to offer services at Hodson Bay will require a detailed business plan to establish final feasibility as well as professionalism and drive to maximise the potential that exists. The extent to which revenue potential can be realised will depend on the successful development of off-peak and shoulder-season activity.

8. SUMMARY ASSESSMENT OF ECONOMIC IMPACT

The economic impact of the proposed development reflects not only direct visitor expenditure, but its role in strengthening the wider tourism cluster at Hodson Bay and contributing to regional destination development in line with national and regional policy objectives.

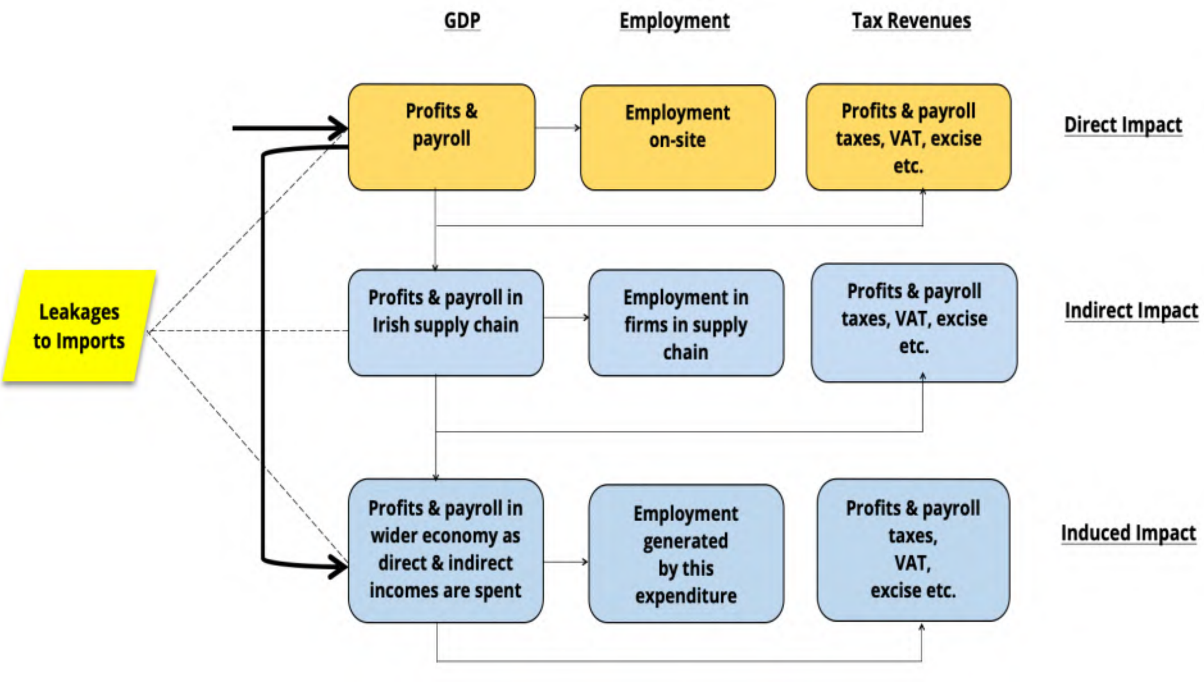
8.1 Development Phase

The economic contribution arising from the development of the HBWP will derive from the employment and expenditure generated directly on-site during the construction phase, and the flow of visitors and their expenditure generated in the subsequent years of operation. In addition to direct impacts, conventional economic impact assessment methodology introduces two further impacts that arise from the employment and expenditure generated on site and the incomes and expenditure this stimulates in other sectors of the economy. This is the multiplier effect, and it occurs at two levels:

a) Indirect effects arising from firms in the project's supply chain hiring workers and buying goods and services in order to meet the particular demand that the project's operations generate.
b) Induced effects arising from the increase in individual and household expenditures generated by incomes earned directly in the project and indirectly in the project's supply chain.

A flowchart demonstrating the linkages that generate direct, indirect and induced economic impacts is set out in Figure 5 overleaf.

Figure 5: Relationships between Direct, Indirect and Induced Impacts on GDP, Employment and Tax Revenues[34]



Calculating the economic impact of international and domestic tourist expenditure in Ireland and elsewhere has traditionally been based on the application of standard income and employment multipliers. These multipliers are derived from input-output (I-O) analysis which quantifies inter-industry linkages throughout the economy. Thus, the effect of a change in final demand in one industry or sector can be traced so that knock-on effects on other sectors can be measured. The scale of these knock-on effects is estimated by means of the multipliers derived from I-O analysis.

While these multipliers are estimated at overall sectoral level, and are properly applied to increases in sectoral activity, they provide an indicator of the potential economic gain generated by an individual project. Such multipliers are also national rather than regional. However, given that a significant share of expenditure and employment generated by the

[34] DKM/CHL

HBWP will be local and regional, it is reasonable to assume that a valuable share of the overall economic impact will also accrue to County Roscommon.

The overall project cost of the HBWP is estimated on a very preliminary basis at €29.93 million, including VAT.[35] Such a level of expenditure could generate the following impacts:

- Investment Multiplier: the economic impact of investment in construction is magnified by the increases in incomes and expenditure stimulated in other sectors of the economy. This is the multiplier effect as described above.

  Based on the Input-Output tables published by the CSO[36] it is estimated that every €1 invested in construction in Ireland generates, directly and indirectly, €1.75 in the broader economy. According to a report by EY on the economic impact of the construction industry[37], the induced effect adds a further €0.26 bringing the total impact to €2.01 per €1 invested. While such multipliers are estimated at overall sectoral level, and are properly applied to increases in sectoral activity, they nevertheless provide an indicator of the potential economic gain generated by an individual project. These multipliers are also national rather than regional. However, given that a significant share of expenditure and employment generated by the development of a construction project such as the HBWP would be local and regional – as is typical of construction projects – it is reasonable to assume that a significant share of the overall economic impact would also accrue to the locality. The overall gross economic impact of the investment would therefore range up to €60 million.

- Employment: the construction industry has a much higher intensity of labour per unit of output than most other sectors of the economy. According to a paper prepared by the Irish Government Economic and Evaluation Service, each €1 million invested in construction generates, directly, indirectly and induced, 12 work-years of employment

[35] TC Estimating Services, 14th July 2026

[36] Central Statistics Office: 'Supply and Use and Input-Output Tables for Ireland 2022' CSO 2026

[37] EY DKM: "The Economic Impact of the Construction Industry" Construction Industry Federation, 2020

(full-time job equivalents or FTEs).[38] This matches the employment multiplier calculated in the EY report (op. cit.) and indicates that the construction phase of the facility would generate up to 359 work-years of FTE.

- Taxation: some years ago, a report by the Nevin Economic Research Institute (NERI) calculated that 42.5% of the cost of investment in construction was returned to the State in the form of tax revenues.[39] A large share of this is generated by payroll, income and corporation taxes arising from increased employment and economic activity. If this proportion is applied to the capital investment cost of the facility, it will generate up to €12.7 million in tax revenues for the Exchequer during its development phase.

8.2 Operations Phase

The socio-economic contribution of the project, once it has commenced operations, would arise from the employment generated, the procurement of goods and services, and from the expenditure of visitors drawn to the HBWP.

- Visitor Expenditure: To the extent that the HBWP serves as an attractor bringing visitors to Hodson Bay itself and to the wider County Roscommon area, the expenditure of these visitors will contribute to the generation of incomes and employment in the surrounding area. Using Fáilte Ireland visitor spend profiles and CSO estimates for daytrip expenditure[40], it is estimated that the development of the HBWP would generate an average of up to €4.07 million additional spend in the local economy each year of operation – i.e. the increase in spend generated by the project over current levels. This includes expenditure at the HBWP (see Section 8.3.4 below). A detailed breakdown of this figure is provided in Table 15.

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[38] Laura Watts, Irish Government Economic & Evaluation Service, Dept. Public Expenditure & Reform, 'How Many Jobs will this Create', Dublin Economic Workshop, 2016:

[39] R O'Farrell: 'An Examination of the Effects of an Investment Stimulus', NERI Working Paper No. 4, 2012

[40] Fáilte Ireland estimates that overseas holidaymakers spend €104 per day, on average, with domestic tourists spending €94 per day (IHH Tourism Facts 2024). The CSO has estimated the average domestic daytrip spend at €52 in 2024, based on the findings of the Household Travel Survey 2024.

- Employment: The expenditure of visitors to the HBWP will support employment in the immediate area. Fáilte Ireland estimate that every €1 million of tourist expenditure helps to support 20 jobs in tourism. On this basis, the project would support 82 jobs in the primary catchment area.

- Taxation: Fáilte Ireland estimates that for every euro spent on tourism (domestic and overseas), 29 cents are generated in tax – this would represent an Exchequer gain of an estimated €1.2m per annum arising from the operation of the HBWP.

Table 15: Visitor Spend Hodson Bay Waterfront Park

Table 15: Visitor Spend Hodson Bay Waterfront Park								
	Post-Development			**Pre-Development**			**Incremental**	
Visitors	**Number**	**Daily Spend**	**Total Spend**	**Number**	**Daily Spend**	**Total Spend**		
		€	**€**		**€**	**€**		**€**
Roscommon	16,860	n/a		11,128	n/a		5,732	0
Rest of Primary Catchment	47,940	52	2,492,880	31,640	52	1,645,301	16,300	847,579
Secondary Catchment	31,500	52	1,638,000	15,750	52	819,000	15,750	819,000
Domestic tourists overnight	14,220	94	1,336,680	7,110	94	668,340	7,110	668,340
Overseas tourists overnight	8,840	104	919,360	4,420	104	459,680	4,420	459,680
Marina & Boat Tour Visitors	49,200	52	2,558,400	24,600	52	1,279,200	24,600	1,279,200
Total	**168,560**		**8,945,320**	**94,648**		**4,871,521**	**73,912**	**4,073,799**

Daytrip spend as per CSO figure for Domestic Daytrips (Household Budget Survey 2024)

Domestic and overseas tourist daily spend as per Failte Ireland figures (Tourism Facts 2024)

8.3 Economic Cost-Benefit Analysis

8.3.1 Assumptions

The following assumptions have been made in preparing the Cost Benefit Analysis (CBA):

a) The estimated capital cost of the proposed development, excluding VAT, is €26.53 million. This is increased in the CBA by a factor of 1.3 in line with the Shadow Price of Public Funds as set out in the Public Spending Code and detailed in Appendix 4.

b) Capital expenditure is expected to take up the first 24 months of project activation. It is assumed that the capital development costs arise in Year 1 (i.e., the starting date) and continue for twenty-four months up to the end of Year 2. It is expected that the operational phase, with associated operational costs and benefits, will commence in Year 3.

c) CHL has adopted an operational time horizon of 15 operational years for the appraisal of the HBWP project. However, in conventional CBA methodology, where there are remaining impacts or value beyond the appraisal time horizon, provision should be made for the inclusion of this residual or terminal value in the CBA analysis. This is particularly the case with facilities whose economic lifetime may easily reach 50 or 60 years. Appropriate allowance for residual value has therefore been included in the CBA for the HBWP.

d) Life cycle costs of €0.7 million have been introduced at ten-year intervals to provide for the periodic refurbishment of the facilities. This is an estimated sum based on the replacement of fittings in the water sports pavilion and café, tiered seating in the changing marquee, site fittings, timber decking, picnic tables, loungers and benches. Building maintenance costs are assumed to be covered in the annual operating budget.

e) On the benefits side of the CBA, a number of non-market benefits can be identified. These include a heightened understanding and appreciation on the part of visitors to the HBWP and a sense of civic pride and community cohesiveness among Roscommon households arising from the investment in the HBWP and its facilities, services and productions. These are non-market benefits which cannot always be readily monetised. Nevertheless, considerable research work has been, and continues to be, undertaken to calculate and attribute monetary values to these types of benefits. An assessment of these non-market but very important community benefits on the basis of Contingent Valuation is included in the CBA, and a detailed explanation of the method and derivation of the value is provided in Appendix 4.

f) Operational economic revenue streams are assumed to balance costs with revenues – the revenue from licence fees and related sources are applied to the maintenance of the public realm. Operating revenues and costs are therefore entered as zero.

g) The valuation of the tourism and daytrip expenditure is based on an assessment of the incremental demand generated by the project, as detailed in Section 8.2. The level of incremental spend rises from 65% of the total target in year 1 of operations to 100% by year 5.

h) All cash flows are presented in real terms over a 17-year time horizon (2 years' construction, 15 years' operation). In accordance with the Public Spending Code guidance on cost-benefit analysis, inflation is not factored into the analysis. As the guide states, the monetary value of costs and benefits should be expressed in real terms so that the effects of inflation do not distort future cost and benefit streams. This is consistent with the use of a constant (real) test discount rate.[41]

i) In the most recent guidance issued by DPER, the test or social discount rate to be used in cost benefit analyses of public sector projects is 4%.[42] Accordingly, CHL has used a discount rate of 4% in this CBA.

j) The key dependent variable arising in the CBA is the economic Net Present Value (NPV) which is the product of subtracting all project costs from the monetised value of all project benefits – all expressed in Present Value (PV) terms. A positive NPV generally means that a project merits consideration for selection and implementation. A negative NPV generally indicates that the project should not be approved for implementation.

[41] Public Spending Code, A Guide to Economic Appraisal: Carrying out a Cost Benefit Analysis, Department of Public Expenditure & Reform, July 2012

[42] Project Evaluation/Appraisal: Applicable Rates, Dept. of Public Expenditure, NDP Delivery & Reform, May 2026

8.3.2 Cost Benefit Analysis Results

The results of the CBA are shown in Table 16. The outcome is a positive Net Present Economic Value of €17.6 million and a benefit-cost ratio of 1.5 which favours implementation of the project. The Economic Internal Rate of return is 4.76%. Key factors in this outcome are the achievement of the projected levels of incremental demand and a monetised valuation of the non-market community benefits of the project through the application of a modest contingent valuation price (Appendix 4).

Table 16: Cost Benefit Analysis (€000's)

Capital Construction Cost (€000 ex VAT)	26,527	Evaluation Time Horizon	17 years
Shadow Price of Public Funds 130%	1.3	Asset Life Span	40 years
Discount Rate - Present Value Factor 4%	0.04	Residual Value (€000)	18,316
Operations Annual Cash Flows	OACF		
Shadow Benefit - tourism/daytrip spend	TDS		
Shadow Benefit Contingent Valuation	CV		
Residual Value	RV		

Year	**Cap Cost**	**OACF**	**TDS**	**CV**	**RV**	**Total**	**Discount Rate**	**PV**
1	-17,243					-17,243	1	-17,243
2	-17,243					-17,243	0.962	-16,579
3		0	2,647	134		2,781	0.925	2,571
4		0	3,055	134		3,189	0.889	2,835
5		0	3,462	134		3,596	0.855	3,074
6		0	3,870	134		4,004	0.822	3,291
7		0	4,073	134		4,207	0.790	3,325
8		0	4,073	134		4,207	0.760	3,197
9		0	4,073	134		4,207	0.731	3,074
10		0	4,073	134		4,207	0.703	2,956
11		0	4,073	134		4,207	0.676	2,842
12		0	4,073	134		4,207	0.650	2,733
13	-700	0	4,073	134		3,507	0.625	2,190
14		0	4,073	134		4,207	0.601	2,527
15		0	4,073	134		4,207	0.577	2,429
16		0	4,073	134		4,207	0.555	2,336
17		0	4,073	134	18,316	22,523	0.534	12,025
Total	**-35,185**	**0**	**57,837**	**2,010**	**18,316**	**42,978**	**13**	**17,583**
							BC Ratio	**1.51**
							EIRR	**4.76%**

8.3.3 Cost Benefit Sensitivity Analysis

Table 17: Cost Benefit Sensitivity Analysis

Sensitivity Analysis				
Variable	**Value**	**NPV**	**BCR**	**EIRR**
Cost	**Base**	17583	1.51	4.76%
	10%	15179	1.40	3.78%
	25%	11572	1.27	2.58%
	-10%	19988	1.65	5.92%
TDS	**Base**	17583	1.51	4.76%
	10%	21645	1.63	5.78%
	-10%	13523	1.39	3.71%
Residual	**Base**	17583	1.51	4.76%
	25%	18523	1.54	4.92%
	-25%	16731	1.49	4.60%

The sensitivity analysis in Table 17 shows how the CBA results respond to changes in the values of key variables. The results show a moderate sensitivity to changes in cost: a 10% increase in project costs brings the NPV down to €15.2m, with a benefit cost ratio of 1.4 and a still positive EIRR of 3.78%. Even a cost increase of 25% produces a positive result with a BC ratio of 1.27 and an EIRR of 2.58%; on the other hand, a 10% savings in costs, which would be achievable if the contingency were not actually required, brings the NPV up to €20m with a benefit cost ratio of 1.65 and an EIRR of 5.92%.

The figures also show a moderate degree of sensitivity to the ability of the project to attract visitors to HBWP and generate additional tourist and daytrip spend (TDS) in the surrounding area. Reductions or increases of 10% have an impact on the economic outcome - with NPV either decreasing to €13.5m or increasing to €21.6m accordingly.

There is less sensitivity to the treatment of residual value. A cut or increase of 25% in its value only changes the NPV by less than 10%. The changes in the BC ratio and EIRR are similarly small.

Residual values are intended to reflect market values at the end of the appraisal period, or the amount that would be obtained on liquidation at that time. Some buildings such as residential and commercial rent-generating properties can maintain their real value in a rising property market. However, there is less certainty in the case of a piece of sports and leisure infrastructure and hence the use of a depreciated value in this analysis.

8.4 Additionality

A key element in a Cost Benefit Analysis is the identification of incremental economic benefit arising from a project. This is particularly relevant in the context of the identified gaps in the current offer, where the proposed development is expected to generate new and expanded demand rather than displace existing activity.

Incremental benefit is assessed using established metrics, including published visitor and catchment population data, and excluding expenditure by County Roscommon residents. The issue of deadweight is addressed by excluding pre-development levels of expenditure from the analysis – see Table 15 above.

The process of developing the CBA above identified the following economic benefits:

- Pre-Development Visitor value of €4.87m
- Post-Development Visitor value of €8.94m
- Incremental value arising from the project: €4.07m
- Incremental value rising from 65% of total in Year 1 to 100% by Year 5

9. RISK ANALYSIS & FUNDING PATHWAY

9.1 Risk Analysis

The development and operation of Hodson Bay Waterfront Park present a range of strategic, operational, and environmental risks that must be carefully considered to ensure long-term viability. As a multi-faceted destination incorporating marina facilities, public realm spaces, and recreational amenities, the project is subject to uncertainties relating to market demand, seasonal fluctuations, funding structures, and stakeholder engagement. This section identifies the principal risks associated with the project and outlines targeted mitigation measures designed to minimise their potential impact. By adopting a proactive and evidence-based approach to risk management, the project can enhance resilience, support sustainable growth, and deliver a high-quality visitor experience.

Table 18: RISKS & MITIGATIONS

Risk Origin	Risk	Mitigation
Market Demand Uncertainty	Projected visitor numbers not achieved	Review existing usage for marina, water sports and public amenity destinations for similar facilities owned and operated by Waterways Ireland and Roscommon County Council to offer greater insight to the likely trajectory of achieving the projected visitor numbers. Review sales plans associated with these facilities to inform the business plan on the required activities to achieve the projected visitor numbers. Work up demand analysis with potential operators including F&B to validate year-round and off seasons volume for the detailed business plan. Put in place a plan for the type of activities will need to be provided for on the public realm (Marina Square, Events Meadow etc.) to attract visitors & who will be responsible for such provision.

Seasonality Risk	Visitor numbers and revenue drop significantly in off-peak months.	Consider all individual & combined project elements across this risk category and articulate rationale for the design decisions in the overall yearly use of across the site. Develop year-round programming (corporates, wellness retreats, indoor classes etc.) in conjunction with potential operators to feed into the detailed business plan. Consider pricing structure for peak & off-peak uses. Consider potential for bundling offers with adjoining facilities – Hotel, Golf Club etc. as outlined in this study and market test their potential with inbound tour operators.
Operational Complexity	Managing multiple activities (Marina, Public Realm & Water Sports Pavilion) could strain resources.	Review operational model options for individual project element along with overall combined facility covering Marina, Public Realm & Water Sport Pavilions elements. Set up an area management group to include onsite stakeholders and businesses which will coordinate shared operational requirements on site including car park at peak periods. Consider in the context of on-site operations the DAC & CLG options outlined in this study, along with SLA's & performance measurements & monitoring for operators.

Capital Funding & Financial Sustainability	Ongoing reliance on public/philanthropic funding and uncertain revenue streams.	Provide clear details on proposed level & source of capital funding for various project elements to include details on match funding requirements where applicable. Prepare detailed economic model considering capital, operational & revenue generation capacity (where applicable) across all individual & combined project elements. Consider phased element delivery & a prioritising of delivery element to achieve project objectives
Infrastructure & Accessibility	Limited transport links and parking could deter visitors	The scheme design has accounted for parking based on year-round utilisation. Peak seasonal demand will require operational collaboration across the site. There is the opportunity for demand led private road transfers connecting to public transport hubs at Athlone and Roscommon It is anticipated that access via water transport will increase based on operator feedback.
Community & Stakeholder Engagement	Local opposition or lack of buy-in	Intensify engagement with key stakeholders prior to finalisation of any design elements. Summarise feedback from public consultation events & show clear linkage between feedback & design layout development. Representation of local businesses and key stakeholders in area management committee.

Delays or restrictions due to environmental regulations		Ongoing engagement with planning authorities and environmental agencies. Incorporate sustainable design principles (low-impact materials, energy efficiency). Consider climate change, flood risk & biodiversity.

9.2 Conclusion

Overall, the successful delivery and ongoing operation of Hodson Bay Waterfront Park will depend on the effective management of identified risks through coordinated planning, stakeholder collaboration, and adaptive operational strategies. While challenges such as demand uncertainty, seasonality, and financial sustainability are inherent in projects of this nature, the mitigation measures outlined provide a clear framework to address these issues. Continued engagement with stakeholders, robust financial and operational planning, and a commitment to environmental sustainability will be essential in ensuring the project achieves its objectives. With these measures in place, Hodson Bay Waterfront Park is well-positioned to become a sustainable, vibrant, and economically beneficial asset for the region.

9.3 Funding Pathway

The delivery of a project of the scale and ambition of the HBWP rarely falls within the remit of one agency alone. As discussed previously, by providing an integrated range of facilities and experiences, the site is evolving from what is essentially an aquapark primarily directed at the youth market with a small number of ancillary services to what will be a recreational destination of appeal to a broad range of consumers.

In addition to Roscommon County Council, other agencies are therefore important stakeholders in delivery: Fáilte Ireland, due to the tourism relevance of the project to this part of Ireland's Hidden Heartlands; and Waterways Ireland due to the presence of the Marina and the ability of the new development to contribute to its strategic objectives for the Shannon network.

Funding the delivery of the project is likewise a collaborative effort, and to be approached on a phased basis. The HBWP project has a strong overall funding case, but only if split into clear fundable packages. Table 19 below identifies the following four development phases and proposed funding mix for each.

Phasing in this manner allows site improvements, in particular to access and egress, to be realised first which will be of benefit to the existing operators at Hodson Bay and provide evidence of capacity and operational functionality as the expanded components of the marina and watersports pavilion come on stream. A detailed construction schedule is presented as part of the masterplan and summarised here in Appendix 8.

TABLE 19. SCHEME PHASES & PROPOSED FUNDERS

Project Element	Potential Funder	Specific Elements	Element for Report Focus on to Strengthen Funding Success
Active Travel & Parking	RCC NTA TII DOT	Shared surface Pedestrian facilities Lighting Crossing facilities Parking rationalisation	Lough Ree Greenway Links (Athlone to HBMP spur) Pedestrian/cycle infrastructure Project to act as a mobility hub / active arrival point Parking rationalisation
Marina Development	WI RRDF DHLGH FI EU JTF	Marina Breakwater Service Block	Increased boat traffic (currently underutilised) Commercial viability Capture of passing boat traffic Role as Shannon network node
Public Realm	RCC RRDF ORIS TVR	Promenade Event spaces Seating, landscaping, lighting Outdoor recreation Trails Lakeside civic space Wild swimming facilities	Clear "town centre / place-making" narrative Not just tourism enhancement, significant civic, social and leisure investment
Water Sport Pavillion & Cafe	FI	Water sports pavilion & cafe	Must demonstrate national & international appeal Flagship activity Hub on Lough Ree Anchor attraction for multi-day itineraries Linked to national tourism priorities and DEDP actions

10. APPENDICES

APPENDIX 1: PRECEDENTS & COMPARATORS

The comparators below illustrate some of the ways in which the Hodson Bay Waterfront Park might be developed to offer a cohesive and aligned set of visitor experiences and amenities. The preliminary set of comparators are from Ireland, followed by a selection from the UK and Europe.

A.1 IRELAND

Acres Lake, Dumshambo, Co. Leitrim

Acres Lake is Ireland's first floating boardwalk and the start of a 6.5km linear walking and cycling trail along the Shannon Blueway.

The site is also the location for a new, €1.2m state-of-the-art water sports facility which is currently in construction. According to a press release[43], the facility will "help extend the outdoor tourism season by providing year-round hot showers, changing rooms, toilets, secure storage, induction spaces, and equipment washdown areas. Accessibility and sustainability will be key focus points for the project, ensuring full wheelchair access and the installation of solar heating panels to comply with 'Nearly Zero Energy Building Standards'. It will also feature Leitrim's first Changing Places facility along with an accessible toilet."

[43] https://www.failteireland.ie/Utility/News-Library/minister-martin-breaks-ground.aspx

Lough Allen Adventure Centre

On the shores of Lough Allen, also in Drumshanbo, Lough Allen Adventure Centre offers a comprehensive range of outdoor water and land-based adventure activities (kayaking, SUP, island adventures, climbing), combined with a Spa & Wellness centre for yoga, sound bath meditation, wellness courses etc.

The facility is run by former para-athlete Tojo Lazzari, and Edwin Gray, a Wim Hof instructor and wilderness expert. The focus is on 'mindful luxury' - upmarket, inclusive, nature-focused. Less hectic than other adventure centres, with more immersive experiences designed to connect you with nature.

Ballyhass Lakes in Mallow Co. Cork

Ballyhass is a family friendly adventure centre and Ireland's only B-Corp certified[44] adventure park on a lake or river, (the other certified adventure park being Killary Fjord which is a sea inlet). The emphasis here is on inclusive outdoor adventure for all age

[44] https://bcorporation.eu/country_partner/ireland/

groups from aqua park and swim camps, to axe throwing, SUP, kayaking and wakeboarding. There are complementary amenities such as saunas and yoga classes.


Castleblayney Outdoor Adventure Centre, Co. Monaghan

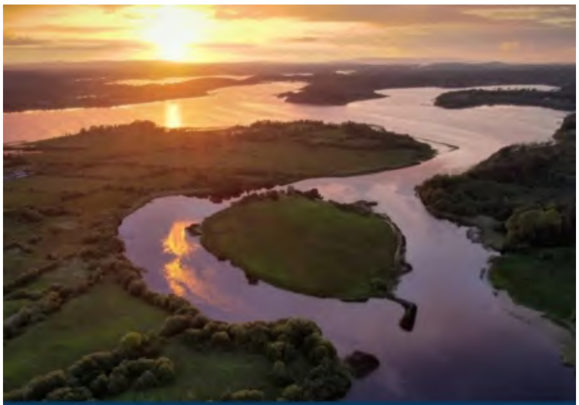
Castleblayney Outdoor Adventure Centre, located in and around Muckno Lake and wooded parklands, offers a wide variety of water sports and outdoor learning programmes. Tuition is provided in sailing, SUP, windsurfing, kayaking and canoeing, as well as a range of other outdoor activities including orienteering, rope-assisted tree-climbing, cycling and team building.

The centre aims to welcome people of all ages and abilities and "encourage all to experience the thrill and challenge of high-quality outdoor learning in a safe, friendly and relaxed atmosphere."


Shannon River Adventure, Rooskey, Co. Roscommon

Located on Lough Bofin, on part of the Shannon Blueway corridor, this popular centre has evolved over the years to provide a variety of water- and land-based activities, including kayaking on the surrounding lakes, SUPs, canoeing and pier jumping. On-land activities and island tours make up the rest.

Accommodation is provided in smart, safari-style glamping tents with views of the water, with other facilities including hot showers and toilet block, outdoor kitchen with tea/coffee and cooking facilities, comfortable indoor recreation/meeting room and a cafe housed in a converted shipping container. Established by a local operator, the centre has an authentic local and 'family' feel, with the focus on the natural landscape rather than anything too manicured or 'manufactured,' so buildings etc. are minimally intrusive. They offer a clear and comprehensive range of packages which allow visitors/families to choose easily from all the activities available.



Skypark at Carlingford Adventure Centre, Carlingford, Co. Louth

Skypark Adventures is a large open-air adventure playground spread over 16 acres just a 20-minute walk from its sister facility, the Carlingford Adventure Centre, which is based mainly in an old building called the Mint. The building allows the Adventure Centre, which offers water sports on Carlingford Lough and land activities in the Cooley Mountains, to provide dorm-style accommodation for up to 300 and to run residential camps for children at various times of the year. In the autumn, when the activities element closes, the Skypark offers a lights attraction, much like the Dublin Zoo winter lights show. The centre is also planning a new sister tree-top attraction near Castlewellan lake soon.

Skypark demonstrate how established adventure centres can continue to develop new attractions that complement or extend their core offerings. The introduction of the lights show demonstrates the facility's ability to adapt to the market and offer attractions that work outside of the peak periods May – September.

A1.2 Comparators in UK and NI

These UK and NI comparators have been selected to illustrate the various ways in which a range of operating approaches to providing experience on water and adjacent land can animate a site all year round. Accessibility, environmental leadership and innovative design approaches are also a key feature.

Alderford Lake Aqua Park, Alderford, the Cotswolds, UK

Operating year-round in some capacity, Alderford Lake Aqua Park is an integrated inflatable waterplay within a broader watersports' infrastructure on a lake.

Originally a lakeside leisure/watersports site, the venue added a UNION Aquapark with 33 features and ca. 135-person capacity. The overall feel is smart yet low-key and understated, with abundant greenery and lakeside amenities including walk-up café/refreshment spaces and informal leisure buildings where natural materials help blend the scheme into the landscape. The main building is flexible and multi-purpose, with a cafe, bookable venue and farm shop. Accessible only by boat, the venue also offers 'Escape Islands' on the lake. Ranked for difficulty, these are an innovative use of the natural features in this lakeside setting.

Life Adventure Centre, Co. Down, Northern Ireland

Established over 20 years ago, the centre is based in a restored historic courtyard in the picturesque Castlewellan Forest Park, on the edge of the Mourne Mountains and amid the Mourne Gullion Strangford Geopark. It offers kayaking, paddleboarding, and canoeing on Castlewellan Lake as well as hiking and biking trails in the nearby Mourne mountains, including on electric bikes.

The emphasis here is on sustainability (the centre has achieved carbon neutral status, recognised by its 'Gold' Award from 'Green Tourism UK'), accessibility, the local community, and the natural beauty of the area. Interestingly, visitors are not allowed to swim in the lake unless taking part in a council-approved event.

SUP & Soul, based in Shropshire, UK

Founded in 2019 by British Norwegian Camilla Todd - an experienced SUP instructor and guide, retreat and circle host and nature facilitation coach - SUP & Soul is a one-woman operation that offers beginner and progression one-to-one and small group paddling as well as various retreat-type experiences in both England and Norway, sometimes in partnership with other wellness practitioners.

This is a small, local business with an emphasis on wellness, building community and connecting with nature. Because it is not attached to or based in any single fixed location, Todd is able to teach or host wherever she finds her customers. As such, SUP & Soul serves as a good example of the kind of smaller, more agile providers that any new facility at Hodson Bay Waterfront Park could partner with to offer a broader range of wellness–oriented outdoor activities year-round.


Lost Shore Surf Resort, Ratho, Scotland

Opened in November 2024, Europe's largest wave pool is a striking and innovative project set within extensive grounds with sleek, luxury accommodation; a waterfront bar, café and restaurant; surf schools; a surf shop; The SurfSkate Academy; and facilities for wellness treatments. The design itself showcases natural material, tapping into several current trends for biophilic design. Alongside the surfing, the focus is very much on the facility's strong sustainability ethos.

Built on a brownfield site in the disused Craigpark Quarry, which had limited fauna and flora, the resort is building a "country park' with new wetland, woodland and grassland habitats which will represent a substantial increase in biodiversity, including soil creation, re-profiling and an entirely new landscape. Other sustainable measures include the exclusive use of renewable energy, and the recycling and treating of water from the nearby Union Canal for its pool, before returning it to the canal reoxygenated, helping to support the health of water that might otherwise become stagnant.

A1.3 Comparators in Europe

There is an abundance of waterside sports and leisure facilities on lakes and rivers across Europe., many funded by the state, especially in Northern Europe. The examples selected below highlight imaginative approaches to destination development along with environmental and sustainability principles.

Ekomarina Giżycko, Poland

Based on Lake Niegocin, Ekomarina Giżycko is widely considered the region's flagship marina and water sports facility, with 130 boat berths; facilities for sailing, kayaking, windsurfing, SUP, and motorboating; eco-certified waste disposal, fuel station and solar heating; eco-friendly showers, laundry and repair services and EU-funded infrastructure focused on protecting lake ecology. The marina hosts events including regattas, festivals and water sports training camps for all levels.

Area 47, Otztal, Austria

Wedged between mountains and a river, this highly sophisticated operation began life as a summer adventure waterpark with high-impact features (slides, wakeboarding, blobbing). It then expanded to include an indoor climbing hall and fitness training centre; all-year guided outdoor sports (ski touring, canyoning, trail running); seminar rooms and event spaces for corporate retreats; and on-site accommodation and wellness areas (saunas, mountain lodges).

Today, as Austria's largest outdoor adventure park, Area 47 covers 9.5 hectares and offers almost 40 summer sports. Water sports facilities include:

- a 20,000-sq-m lake for wakeboarding (see image on left below)
- white water rafting on the river in the Imst Gorge
- a 20,000-sq-m water park that includes a 50m-long obstacle course, 5 water slides, Europe’s fastest water slide (top speed 80 km/h) and a diving platform

What was a niche, adrenaline-focused water park is now an impressive year-round alpine sports hub that attracts school groups, businesses and wellness travellers. There is something for everyone, making the place attractive to a wide array of visitors.

Les Prés du Hem in Armentières, France

Spanning 120 hectares, this family–friendly park was developed around an artificial lake that was originally built in the late 1970s as a water reserve for the region. In the early 1980s, it transformed into a family-friendly leisure destination under the ownership of the Métropole Européenne de Lille. What began life as a basic sailing and kayaking lake has expanded to include an eco-station and nature reserve with guided education programmes; family activities including a splash zone, pedal boats, miniature train and nature trails; a café, seasonal markets and events space; and low-key off-season offerings like birdwatching, walking and winter picnics.

Functioning both as a recreation park and ornithological reserve, Les Prés du Hem is a solid municipal example of blending light-touch recreation, environmental education, and seasonal family activities into a long-lasting community asset that works year-round.

Sandaya Campsites

Sandaya has sixty-six 4- & 5-star campsites located in premium scenic coastal, lakeside, countryside or mountain locations across Europe. Many offer impressive water parks and wellness areas in addition to standard campsite facilities such as a shop, laundry and so on. The water sports on offer range from pedal boats on lakes and canoeing on rivers, to activities like waterskiing.

Operating seasonally May to September (though some sites offer bookings April to October), Sandaya sites fall into one of two camp environments, 'Chill' or 'Club', with amenities to match; Chill is all about connecting with nature, whilst Club is about entertainment and activities. There's also a wide variety of accommodation styles available, including tree houses, lodges, cottages, mobile homes and glamping tents. Sandaya sites are a good example of upmarket, family-friendly campsites with sophisticated amenities and stylish, design-led accommodation.

Pier Watersports Centre, Lake Garda, Italy

Located at the Hotel Pier, on the windiest part of the lake, this is a popular and well-established centre for windsurfing, wind foil and parawing - the 'hard adventure' side of water sports. A road separates the centre on the rocky lakeshore from the main hotel behind. Although the lakeside setting is spectacular, the 3-star hotel itself is functional. Visitor reviews suggest there is not much to do outside water sports, with few other water-based activities and only a small 'beach' with astroturf. But it's also clear the hotel is very much dedicated to surfers, so the alignment here is good.

A facility like Pier Watersports Centre is sustained by a mix of on-water infrastructure, shore-based amenities, and support services that align with local regulations, tourism standards and the needs of both beginners and experienced participants. At Pier, these include jetties for launching wakeboard boats/rescue craft; trained personnel; dedicated storage for gear; toilets, changing rooms & showers; a cafe/snack bar with lake views; relaxation areas with bean bags; parking; storage for bikes and scooters; and facilities for boat docking.

The centre is open mid-March to late October. There is no room to expand further in its current site. If that were possible the potential is clear to upgrade to year-round operation and/or premium level, adding features such as a sauna or spa for post-session recovery; indoor simulation equipment (wind tunnel, balance boards); more diverse accommodation options (e.g. glamping pods); and a digital weather station with real-time wind/wave data.

Lake Ukiel Sports & Leisure Centre, Olsztyn, Poland

The city of Olsztyn is widely considered the gateway to the Masurian lake region. This centre, designed by Dżus GK Architekci et al in 2014, is a landmark public facility on the shore of Lake Ukiel, which is the biggest in a region of over 1,000 lakes. Serving as a multi-use hub for both recreation and community events throughout the year, the centre is widely considered, if not an anchor facility, certainly an exemplar in its category. The building itself is an elegant, elemental contemporary design in concrete, glass and wood, with some of the roofs on the various glass pods equipped with terraces that offer lake views.

Because the facility was purposely designed to operate year-round, all the materials were chosen to be vandal proof and weather resistant in an area where the weather is hot in the summer and cold in the winter. Elements include a 2,930-sq-m all-season building comprising a restaurant/café, boat rental, water-sports equipment hire, changing rooms, and training/observation terraces connected via piers; open glazed volumes with green roofs, and wooden façades, offering panoramic lake views; pier-level observational decks and slips for rescue and rental craft; and upper terraces for events or classes.


APPENDIX 2: SUPPORTING MARKET ANALYSIS

An essential foundation for assessing the business potential of any experience or operation is a market assessment to establish the scale and characteristics of various audiences and segments from which customers can be drawn. The market for the Hodson Bay includes the population of the catchment area, as well as educational, group and other niche segments. As it is a nature-based ‘offer, it is of relevance to visitors, and therefore the domestic and international tourism markets can also be considered.

A2.1 Location and Access

Hodson Bay is located a few minutes’ drive from Athlone and readily accessible to those staying in the town or passing through along the N6/M6. More broadly, as a destination attraction it is within driving distance of both Galway and Dublin and can hope to attract visitors from both of those urban hubs. See Table A1 below.

TABLE A1: DRIVING DISTANCE TO HODSON BAY[45]

Location	Distance mins (by car)	Distance kms
Athlone	11	7.4
Mullingar	47	68
Galway	66	87
Dublin	92	130

A.2.2 The Catchment Area

Residents living within the vicinity of Hodson Bay and Athlone are a useful source of repeat and year-round business. They are also useful as a means of reaching visitors staying in the area with friends and/or family.

[45] Distances and travelling time from Apple Maps, mapped to the Hodson Bay Hotel

A primary catchment area of up to forty-five minutes 'drive has been selected as the most appropriate. This is the area from which consumers may be drawn on a regular basis and for year-round activities and offers. It includes several towns: Ballinasloe, Mullingar, Tullamore, Birr and Longford, as illustrated in Figure A1. The population of this area is approximately 270,000.

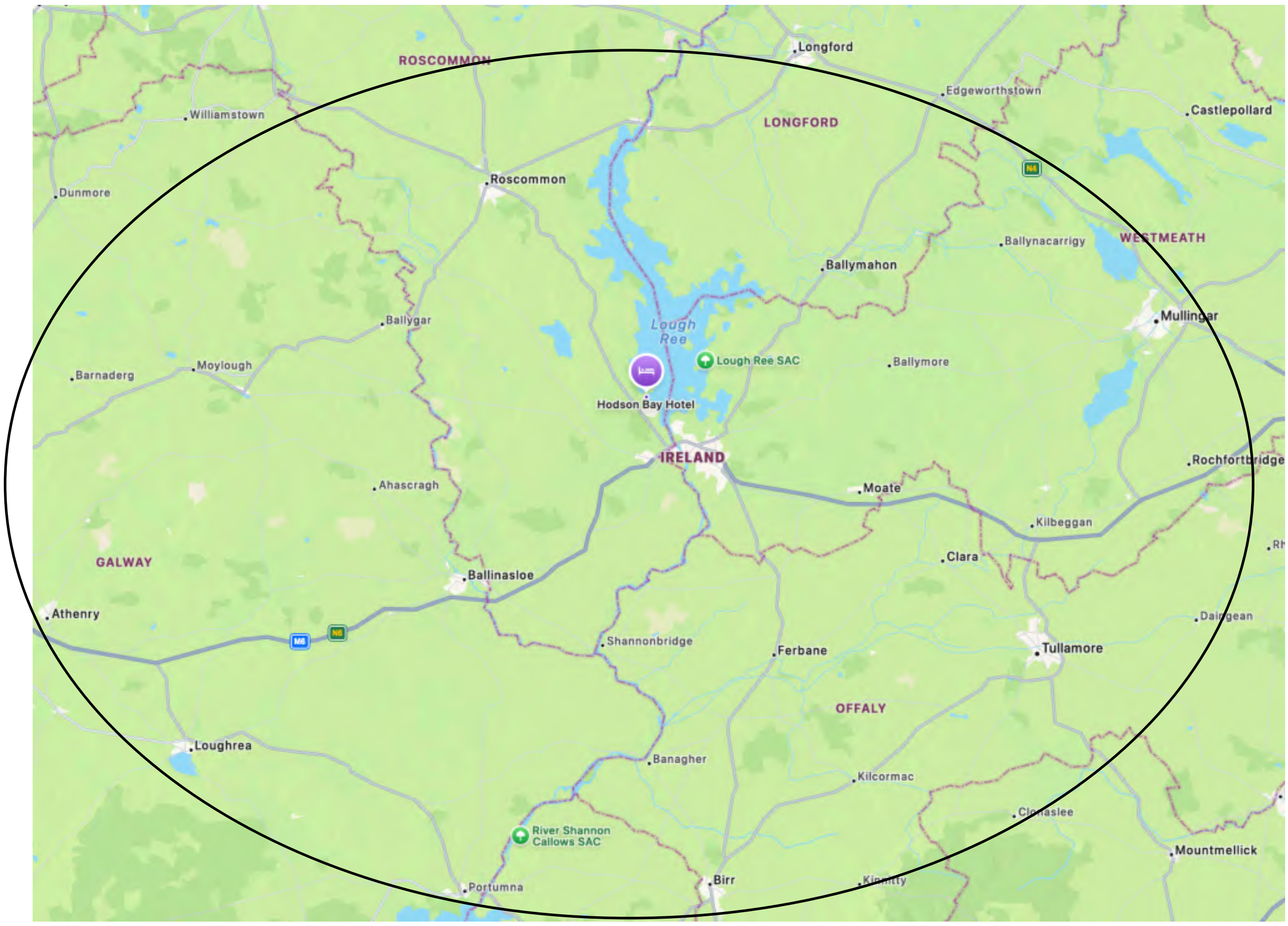


FIGURE A1: PRIMARY CATCHMENT AREA FOR HODSON BAY

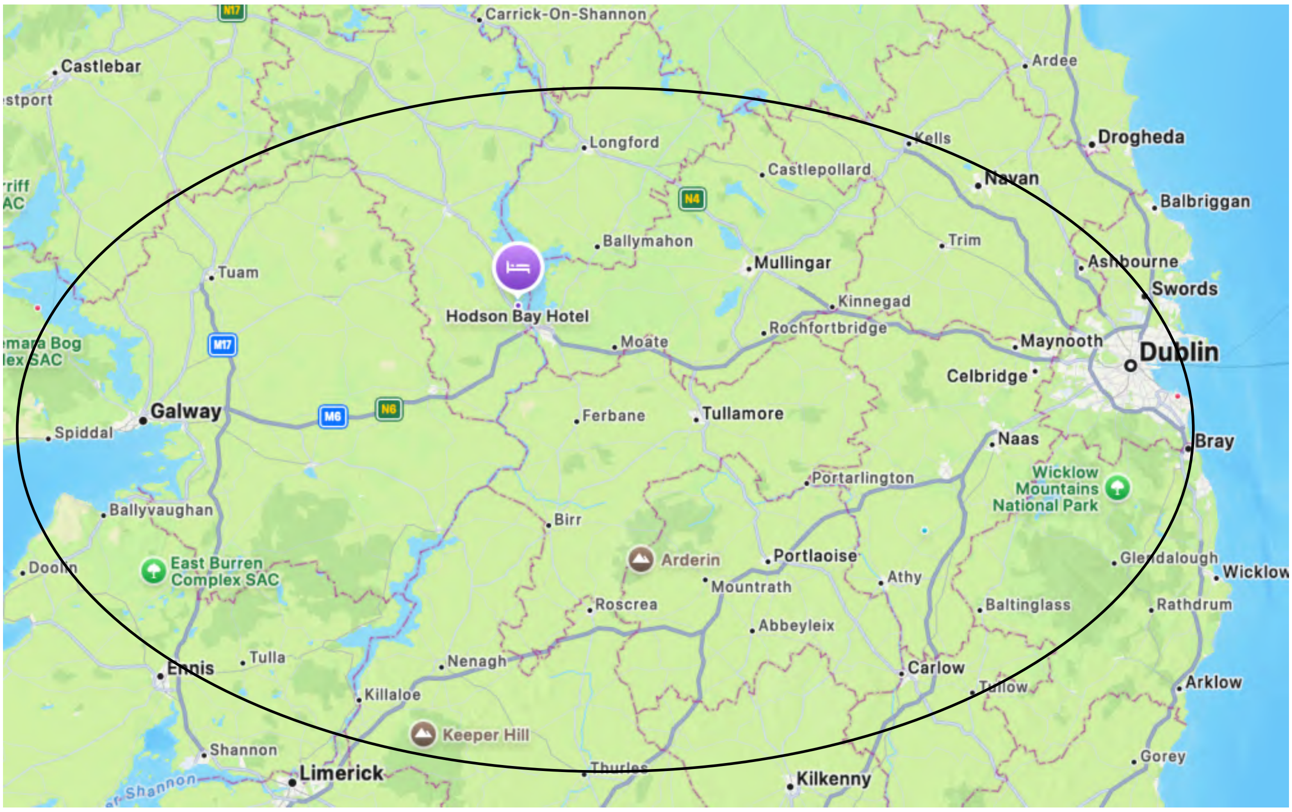
There are several characteristics of this catchment population that are relevant to the development of expanded and new experiences at Hodson Bay.

- One fifth of the population are aged 15 years or under: a significant market for family and youth-oriented offers and amenities[46].
- The average age is approximately 39 years[47].
- A quarter of the workforce work from home at least one day a week, suggesting potential to develop weekday offers relating to wellbeing and fitness[48].

A secondary catchment can also be considered and for this, a drive time of approximately 90mins can be considered - with evidence that families and schools (see Figure A2) are already travelling from this wider catchment area to Hodson Bay. This is an area that includes Galway and Dublin cities, and a population of over 2.1 million. While visitors are unlikely to be as regular from this wider area given the driving distance and the wide availability of other waterside/water-based experiences along the coast, it is a highly populated area and has the potential to be significant in terms of operational viability if the experience is sufficiently attractive and there is an effective marketing campaign to support it.

[46] The average across Westmeath, Roscommon, Longford and Offaly is that between 20% and 21% of the population is aged 15 years or under, Census 2022, CSO.
[47] Census 2022, CSO.
[48] The average ranges from 21% to 27% across the four-county area mentioned in footnote 2.

FIGURE A2: SECONDARY CATCHMENT AREA FOR HODSON BAY



A.2.3 Tourism Markets

Ireland's Hidden Heartlands (IHH) Region is an area that is still developing from a tourism perspective. The strategy for tourism development in the Region is to position it "for domestic families and unconstrained adults as an easy to access, surprising and tranquil region. It will focus on fun, nature–based holidays and breaks where the visitor delights in discovering hidden cultural and heritage gems. There will be a focus on the visitor motivations of Bonding with family, Social Energy, Time Out and Adventure directed at a combination of families and young unconstrained adults (<45 years)[49]".

Counties Westmeath, Roscommon, Longford, Offaly and east County Galway all attract modest levels of both domestic and international tourism. As a result, data is not available for all and, where it is, it may be published as an amalgamation of two counties. Table A2 provides the published estimates for the relevant counties[50].

TABLE A2: DOMESTIC TOURISM

County / Counties	Domestic Trips
Westmeath	262,000
Roscommon & Longford	277,000
Offaly & Laois	287,000
Galway	462,000

The region is popular for domestic families and half of all Irish tourists are travelling as part of a family. Not surprisingly then, the trip being an opportunity to connect with loved ones is important - 31% of domestic tourists say bonding is a primary motivation for travel; adventure is also important (21%). Few use public transport - 15% to reach their destination and 14% in-destination[51].

[49] Ireland's Hidden Heartlands Regional Tourism Development Strategy 2023-2027
[50] Key Tourism Facts 2023, Fáilte Ireland.
[51] Key Tourism Facts 2023 Ireland's Hidden Heartlands, Fáilte Ireland.

As the data reports, the overseas tourists to IHH[52] makes up a smaller proportion of the market presently 357,000 overseas tourists & 85,000 Northern Irish tourists. A large proportion of overseas tourists to IHH are in the region to visit family and friends (62%), reinforcing the point made earlier about the importance of the catchment population in reaching tourists.

A.2.4 Niche Markets

There are several niche markets that are important to Hodson Bay, the main one being schools. The primary and secondary schools' market is a segment that has already been important for Baysports and can continue to be a valuable source of business for the Hodson Bay area. It can also provide a way of tapping into the catchment area market.

Typically, schools will travel further than day trippers for an outing and therefore a wider catchment area can be considered than the primary catchment of 45 minutes' drive. Hodson Bay has a schools' market of approximately 206,000, as shown in Table A3 It can also hope to attract a small proportion of the Dublin and Galway city markets, although this potential may be more difficult to realise and is not included in Table A3 below.

TABLE A3: SCHOOLS POPULATION [53]

County	Population
Westmeath Pupils	20,315
Roscommon Pupils	12,850
Longford Pupils	9,757
Offaly Pupils	16,246
East Galway Pupils (proportion of County Galway total based on east/west constituency population distribution)	14,851
Laois Pupils	17,863
Kildare Pupils	51,164

[52] Ibid.

[53] School enrolments 2023/24, CSO

County	Population
Kilkenny Pupils	19,446
Meath Pupils	43,607
TOTAL	206,099

Outdoor Active Groups: These include outdoor active groups of various kinds, especially those based on watersports but also walkers and cyclists. The scale of the opportunity is more difficult to gauge and direct marketing/networking with clubs would be an important part of developing business from this segment.

Social Groups: There are also other groups that are more based on social engagement, such as men's and women's groups, retirement groups, and others for whom the opportunity to engage in activities would be secondary to the social aspect of visiting Hodson Bay.

A.2.5 Summary of Markets

In terms of the size of the opportunity, the wider catchment market clearly is the largest - as shown in Table A4. This makes it a significant source of potential business, but the offer needs to be sufficiently differentiated from other waterside experiences available elsewhere to attract customers from this wide an area. The domestic tourism market is also substantial, offering good potential for strong family-oriented business.

TABLE A4. SUMMARY OF MARKETS[54]

Markets	Population Size
Primary Catchment	270,000
Secondary Catchment	2.1 million+
Domestic Tourists in Westmeath, Roscommon/Longford, Offaly and catchment area of east Galway	711,000

[54] The distribution of bed capacity is used to provide a basis of tourism distribution of the domestic market for County Offaly (47% of total Laois/Offaly bed capacity) and the catchment area of east Galway (8% of County Galway bed capacity, excl. City).

NI Tourists in the rest of IHH	85,000
International Tourists in IHH	357,000
Schools	206,000

APPENDIX 3: ESTIMATING ACTIVITY REVENUE - SENSITIVITY ANALYSIS

20% Reduction In Yield

Activity	Months	Sessions per Week	No. of Sessions per Annum	Avg. Price per Session	Total Capacity	Utilisation Rate	Total Visitors	Avg. Total Revenue
Aqua Park	April-September	N/A	N/A	€18.80	N/A	N/A	80,000	€1,504,000
Paddle Sports, peak season	May-September	42	882	€15.00	70	50.0%	30,870	€463,050
Paddle Sports, off peak	October-April	15	435	€15.00	50	35%	7,613	€114,188
Sauna	All year	60	2880	€12.00	23	30.0%	19,872	€238,464
Wellness Classes, indoor (yoga, meditation, pilates, etc.)	September-May	5	175	€8.00	25	90.0%	3,938	€31,500
Wellness Classes, outdoor (yoga, meditation, pilates, etc.)	June-August	5	65	€8.00	25	90.0%	1,463	€11,700
Social Events (e.g. 'paint and sip', book clubs, craft, other)	All year	3	144	€8.00	30	75%	3,240	€25,920
Events (indoor / outdoor) - *see explanatory note*	All year	1	48	€64.00	20	100%	960	€61,440
Food & Beverage	All year	N/A	N/A	€4.77	N/A		168,600	€803,885
Private Venue hire	October-April	1	29	€240.00	N/A	N/A	N/A	€6,960
Total Revenue								**3,261,106**

Notes:

- **AquaPark** price used is child fee per hour (to also accommodate reduction in price for multi-activity packages); total visitors based on maximum peak previously demonstrated by Baysports
- **Kayak/SUP** hire price is based on average between single and double rental (€20/€35 = €18.75) and this is used to apply to all paddle sports units (e.g SUP, or other)
- **Sauna: b**ased on larger capacity sauna (ref. Hot Box)
- **F&B** based on AVEA non-Dublin average f&b spend, applied to overall visitor numbers as elaborated in Section 5
- **Events**: market income is based on stall holder rental fees; average fee used is at the low end, for non-food/craft from DLRCoCo

20% Reduction in Numbers

Activity	Months	Sessions per Week	No. of Sessions per Annum	Avg. Price per Session	Total Capacity	Utilisation Rate	Total Visitors	Avg. Total Revenue
Aqua Park	April-September	N/A	N/A	€23.50	N/A	N/A	64,000	€1,504,000
Paddle Sports, peak season	May-September	33.6	705.6	€18.75	70	50.0%	24,696	€463,050
Paddle Sports, off peak	October-April	12	348	€18.75	50	35%	6,090	€114,188
Sauna	All year	48	2304	€15.00	23	30.0%	15,898	€238,464
Wellness Classes, indoor (yoga, meditation, pilates, etc.)	September-May	4	140	€10.00	25	90.0%	3,150	€31,500
Wellness Classes, outdoor (yoga, meditation, pilates, etc.)	June-August	4	52	€10.00	25	90.0%	1,170	€11,700
Social Events (e.g. 'paint and sip', book clubs, craft, other)	All year	2.4	115.2	€10.00	30	75%	2,592	€25,920
Events (indoor / outdoor) - *see explanatory note*	All year	1	38.4	€80.00	20	100%	768	€61,440
Food & Beverage	All year	N/A	N/A	€5.96	N/A		134,880	€803,885
Private Venue hire	October-April	1	23.2	€300.00	N/A	N/A	N/A	€6,960
Total Revenue								**3,261,106**

Notes:

- **AquaPark** price used is child fee per hour (to also accommodate reduction in price for multi-activity packages); total visitors based on maximum peak previously demonstrated by Baysports
- **Kayak/SUP** hire price is based on average between single and double rental (€20/€35 = €18.75) and this is used to apply to all paddle sports units (e.g SUP, or other)
- **Sauna:** based on larger capacity sauna (ref. Hot Box)
- **F&B** based on AVEA non-Dublin average f&b spend, applied to overall visitor numbers as elaborated in Section 5
- **Events**: market income is based on stall holder rental fees; average fee used is at the low end, for non-food/craft from DLRCoCo

APPENDIX 4: COST-BENEFIT ANALYSIS PARAMETERS

A4.1 The Public Spending Code and Cost Benefit Analysis Parameters

The Public Spending code is defined as follows: "All Irish public bodies are obliged to treat public funds with care, and to ensure that the best possible value for money is obtained whenever public money is being spent or invested. The PSC is the set of rules and procedures that ensure that these standards are upheld across the Irish public service. In September 2013, departments and offices were formally notified that the PSC is in effect."

The PSC is managed, monitored and updated by the Department of Public Expenditure, NDP Delivery and Reform. It has been periodically updated, the latest update being published in December 2023.[55] Within the PSC, specific guidance is given in relation to Cost Benefit Analysis (CBA). This was issued as central guidance in July 2012.[56] In presenting this guidance it was stated that:

"In considering a spending proposal, decision makers need to be assured that the overall welfare of society is raised as a result of the proposed action. CBA attempts to evaluate the proposal from the perspective of society by placing all the costs and benefits on a comparative monetary scale".

In July 2019, the Department of Public Expenditure & Reform (DPER) published a guidance document on economic appraisal parameters "to ensure that there is consistency across the analysis being conducted such as Cost Effectiveness Analysis (CEA) and Cost Benefit Analysis (CBA)".[57] The parameters examined are the social discount rate, and the shadow prices of labour, public funds and carbon. In addition to these parameters, a paper by the

[55] The Public Spending Code: Infrastructure Guidelines, Department of Public Expenditure, NDP Delivery & Reform, December 2023

[56] The Public Spending Code: A Guide to Economic Appraisal: Carrying out a Cost Benefit Analysis, Department of Public Expenditure & Reform, July 2012

[57] Public Spending Code: Central Technical References and Economic Appraisal Parameters, DPER, July 2019

Irish Government Economic & Evaluation Service (IGEES) in DPER considered the time horizon for projects[58]. The various parameters are set out below.

A4.1.1 Time Horizon

The time horizon for a capital project essentially refers to the anticipated operational lifespan of the asset being developed. Identifying the correct time horizon is clearly fundamental to the conduct of a CBA. An unduly long-term horizon will serve to inappropriately elongate the lifespan of the project and could produce an overly optimistic picture of project benefits. Equally an unduly short life span could serve to understate the likely project benefits. The IGEES paper offers the following guidance on this matter:

"It is worth noting a number of points in relation to the approach to setting a time horizon. Firstly, for the majority of interventions, its lifetime will correspond to the period over which it has an impact. The majority of the impact should be as a result of the project or asset being in service or operational. As such, the lifetime of the asset or intervention should equate to consideration of the impacts of the project in the majority of cases. For the majority of infrastructure projects, the relevant flows of benefits and costs are linked to the economic lifetime of the asset. For instance, for a given infrastructure project impacts such as service benefits will cease once the infrastructure is no longer in service."

IGEES also offers a comment on setting a time horizon based on an EU standard.

"The European Commission's appraisal guidance states that for the financial appraisal of projects that; 'cash flow forecasts should cover a period appropriate to the project's economically useful life and its likely long-term impacts. The number of years for which forecasts are provided should correspond to the project's time horizon (or reference period). The choice of time horizon affects the appraisal results. In practice, it is therefore helpful to refer to a standard benchmark, differentiated by sector and based on internationally accepted practice."[59]

[58] Irish Government Economic & Evaluation Service: Central Technical Appraisal Parameters, Staff Paper, DPER 2018
[59] Ibid p39

Table A2.1: European Commission Reference Benchmark Periods

Category	Reference Period (Years)
Railways and Water Supply/Sanitation	30
Roads and Waste Management	25-30
Ports and Airports	25
Urban Transport	25-30
Energy and Research and Innovation	15-25
Broadband	15-20
Business Infrastructure and Other Sectors	10-15
	Source: European Commission, 2014

Having regard to the foregoing commentary, CHL has adopted an operational time horizon of 15 operational years for the appraisal of the HBWP project. However, as also noted in the IGEES paper, where there are remaining impacts or value beyond the appraisal time horizon, provision should be made for the inclusion of this residual or terminal value in the CBA analysis. This is particularly the case with buildings whose economic lifetime may easily reach 50 or 60 years. Appropriate allowance for residual value has therefore been included in the CBA for the HBWP.

A4.1.2 Discount Rate

When comparing the costs and benefits of a prospective public project over time, standard practice under economic appraisal is the use of a discount rate. This permits assessment of a project's net worth in present terms. As stated in the guide issued by DPER,

"It is evident that the costs and benefits of a project will often occur at different points in the project's lifecycle. For example, in a construction project costs generally arise and peak in the short term while construction occurs whereas benefits generally emerge in the medium to longer term as the investment is utilised. Assuming that society values costs and benefits differently depending on how far into the future they arise, a social discount rate should be used to convert future income streams into their value today (present value) to permit the inclusion of time preference for appraisal purposes."[60]

In the most recent guidance issued by DPER, the test or social discount rate to be used in cost benefit analyses of public sector projects is 4%[61]. Accordingly, CHL Consulting has used a discount rate of 4% in this CBA.

A4.1.3 Shadow Price of Public Funds

The Shadow Price of Public Funds is a technical parameter used in economic appraisal. to account for the distortionary effects of taxation, such as production and consumption decisions which are different than they would be if there was no tax. As stated in the DPER document on economic appraisal parameters

"Government taxation which distorts market prices will necessarily alter the incentives faced by economic agents when making decision s.....On the margin, this causes a reduction in economic activity in comparison to that which would otherwise have occurred, creating a deadweight loss for society. This opportunity cost of taxation is often referred to as the Shadow Price of Public Funds."[62]

The guidance issued by DPER states that "the estimated deadweight loss associated with taxation is €0.30 per €1 collected, meaning the estimated value of the Shadow Price of Public Funds in Ireland is set at 1.3, or 130%". This Shadow Price should be applied to the net public financial costs of a project. This guidance is followed by CHL in this report.

A4.1.4 Shadow Price of Labour

The IGEES paper describes the shadow price of labour as follows:

"The Shadow Price of Labour is an estimate of the net social good attributable to the creation of additional employment, applicable to CBA appraisal. In contrast to normal

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60 Public Spending Code: Central Technical References and Economic Appraisal Parameters, DPER, July 2019

61 Project Evaluation/Appraisal: Applicable Rates, Dept. of Public Expenditure, NDP Delivery & Reform, Dec 2025

62 Public Spending Code: Central Technical References and Economic Appraisal Parameters, DPER, July 2019

goods prices, which are decided through the market mechanisms of supply and demand, shadow prices are estimated based on a set of assumptions about society. More formally, a shadow price is defined as the good's social opportunity cost - the net social gain from having one extra unit, as assessed in terms of a well-defined social criterion, representative of overall social welfare."[63]

The shadow price of labour in Ireland has been set at between 80% and 100% for a number of years and the general guidance is that market rates for labour costs should be used unless there is a very clear reason for deviating from this. The guidance from DPER is that detailed justification should be provided for the use of an SPL less than 100%. CHL has followed this advice and an SPL of 100% is used in this report.

A4.2 Contingent Valuation

In recent years, a considerable amount of work has been undertaken aimed at better understanding how publicly funded capital investment projects might be more appropriately evaluated. The particular issue in question is how to balance those factors that can be readily expressed in a quantitative financial figure and presented in market prices - for example, a market price for building materials or, in the case of revenues, a market price for admission charges – with benefits for which there is no market price, such as free access to public parks.

For the most part, the market mechanism works efficiently to establish costs and prices. However, many publicly funded entities such as museums, galleries, theatres and public parks, are not trading entities nor are they established to operate as such. Many operate on a free to enter basis. So, in the absence of a market-driven admission charge, an alternative method of assessing value is required.

Contingent valuation is a method (usually drawing upon consumer survey tools) to establish a consumer's willingness to pay (WTP) for a specified good, or their willingness to accept (WTA) the removal or withdrawal of a specified good. The first of these is a

[63] Irish Government Economic & Evaluation Service: Central Technical Appraisal Parameters, Staff Paper, DPER 2018

positive proposition whereby the individual consumer states their willingness to pay for something – the greater the willingness and enthusiasm on the part of the consumer for that thing, the higher the declared price will be.

The second is a negative proposition consisting of the implied intention to remove or withdraw a good or product. The concept of willingness to accept the negative proposition is associated with an arrangement to compensate the consumer for the withdrawal or loss of the good or product in question. The greater the consumer's attachment to the good or product under threat of withdrawal, the higher will be the level of monetary compensation required by the consumer.

Both approaches elicit from the consumer a statement of their preference translated into monetary values. In the first case it establishes the consumer's willingness to pay for a perceived positive intervention, and, in the second case, it establishes the consumer's willingness to accept (but only on the basis of compensation to be made) a perceived negative intervention.

Essentially both approaches are doing the same thing. But most significantly, this expression of economic value is arrived at usually through a research and survey process, and without any recourse at all to conventional market forces or any attempt to infer consumer preferences through observation of their behaviours in conventional marketplaces.

This approach to value identification is an evolving process, but the essential principle is increasingly accepted. Indeed, the use of CVM has been addressed in the Public Spending Code.

"Benefits should always be valued based on willingness to pay. Where market values are not available (e.g. scenic benefits, value of life, value of time), other techniques can be used. These include stated preference techniques such as contingent valuation as well as revealed preference techniques such as hedonic pricing and travel cost analysis." [64]

Drawing upon the observations made in the extract above from the Public Spending Code, it can be stated that market values are not available in respect of the public non-market benefit to be delivered by the HBWP public realm developments. Therefore, any attempt to fully value the project must have recourse to stated preference techniques and most specifically to the CV methodology, and an examination of willingness to pay and how this might be framed.

In the case of public parks, there has been much research internationally on the contingent valuation of parks. A significant study published in 2020 comprised a review of some 125 contingent valuation studies of parks and natural protected areas. [65] According to the paper, "Previous surveys widely used entrance tickets as a payment vehicle. The results showed that participants in different countries are willing to pay from €0.017 to €63.95 to visit forest parks. The WTP amounted to €0.068 – €16.81 per visit for wildlife parks, €1.4 – €13.53 for marine parks and €0.058 – €10.40 for urban parks and green areas." Studies in Europe quoted in the paper found the willingness to pay for park admission ranged up to €5.18. For the purposes of our cost benefit analysis of the HBWP, we have conservatively taken the mid-point between €1.40 and €5.18 – i.e. €3.29 as an appropriate value for households in County Roscommon and Athlone.
Updated to 2026 values, this becomes €4.10.

64 The Public Spending Code: A Guide to Economic Appraisal: Carrying out a Cost Benefit Analysis, Department of Public Expenditure & Reform, July 2012

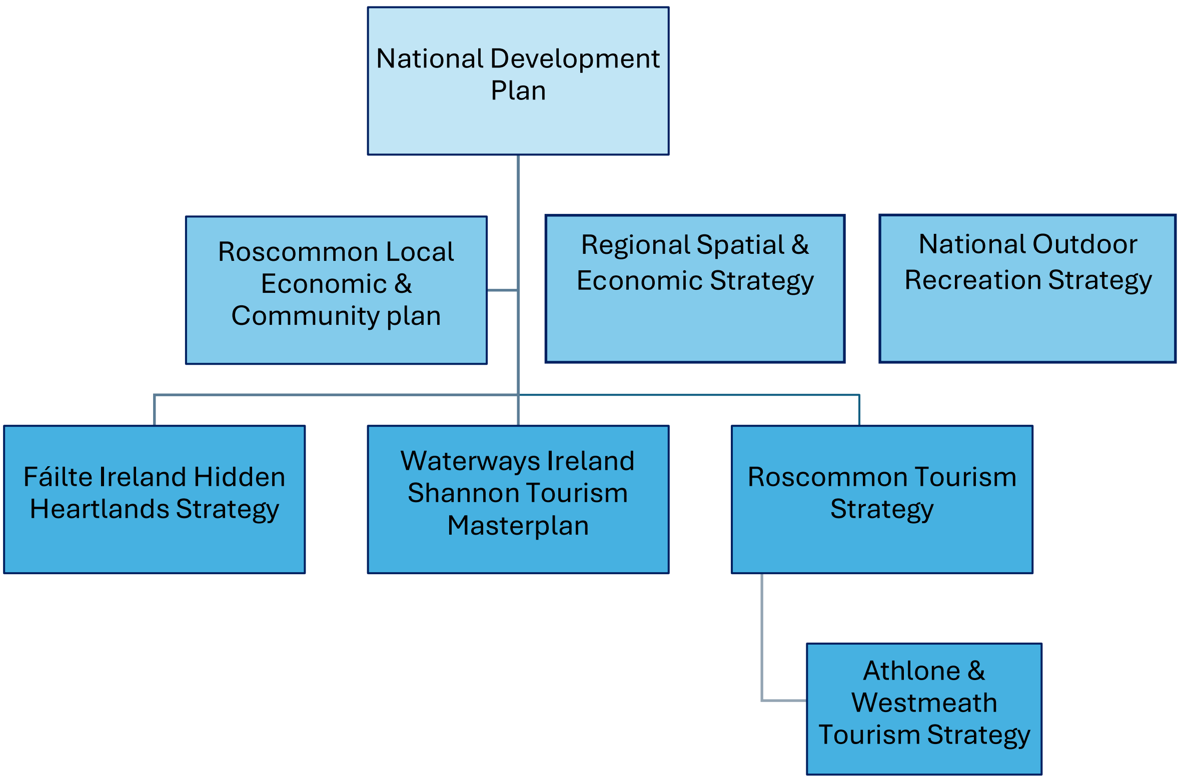
65 Halkos, Leonti, Sardianou: **Assessing the Preservation of Parks and Natural Protected Areas: A Review of Contingent Valuation Studies,** Sustainability 2020, 12, 4784

APPENDIX 5: STRATEGIC CONTEXT

Hodson Bay Waterfront Park Development is an anchor initiative to further enhance the use of the natural amenity of Lough Ree in complement to the current established activities in the area and with the intention to complement future development of tourism, leisure and hospitality facilities in the immediate and wider area.

The development of tourism and related infrastructure in the Roscommon-Athlone-Shannon corridor is guided by a series of national, regional, and local strategies. These plans present a cohesive vision centred on sustainable growth, place-making, connectivity, and unlocking the natural and cultural assets of the central midlands and Shannon.

FIGURE A5. STRATEGIC CONTEXT FOR HODSON BAY



Core priorities for each are outlined below in summary, highlighting the ways in which the proposed development of Hodson Bay Waterfront Park is strategically aligned.

A.5.1 National Development Plan (NDP)[66]

- Investment in transport and access infrastructure, especially regional roads and public transport links connecting Roscommon, Athlone, and the wider Hidden Heartlands region.

- Support for regional growth centres, with Athlone identified as a key regional driver for the Midlands.

- Sustainable tourism and environmental protection promoted through targeted funding for heritage, waterway, and eco-tourism assets.

- Development of green infrastructure such as greenways, cycleways, and recreational amenities around Lough Ree and the Shannon corridor.

- Digital connectivity improvements to support smart tourism and remote visitor services in rural areas.

- Emphasis on balanced regional development, ensuring rural areas like Roscommon are integrated into national economic and tourism planning.

A.5.2 National Outdoor Recreation Strategy [67]

- To create a more coordinated and cohesive approach at national and county level, ensuring better use of resources and stronger collaboration between agencies, communities and stakeholders.

- To protect landscapes, habitats and heritage through sustainable planning, development and management of outdoor recreation infrastructure and activities.

- To increase awareness of outdoor recreation opportunities and promote responsible enjoyment of the outdoors, including education around sustainable behaviours.

[66] https://assets.gov.ie/static/documents/NDP_Review_document_-_updated_in_use.pdf
[67] https://assets.gov.ie/static/documents/embracing-irelands-outdoors-national-outdoor-recreation-strategy-2023-2027.pdf

- To increase participation in outdoor recreation, particularly among young people and under-represented groups, improving health, wellbeing and social inclusion.
- To protect and improve public access to outdoor spaces and recreation opportunities for the benefit of all users.
- To improve the knowledge, skills and expertise of stakeholders, landowners, communities and organisations involved in outdoor recreation development and management

A.5.3 Regional Spatial and Economic Strategy[68]

- Supporting the growth of cities, regional growth centres, towns and villages in a more compact and sustainable way, reducing urban sprawl and strengthening town centres and rural communities.
- Improving regional accessibility and connectivity through investment in sustainable transport, greenways and active travel, public transport, digital infrastructure and broadband, strategic road and rail connections, with a strong emphasis is placed on reducing regional infrastructure deficits.
- Developing a stronger, innovation-led regional economy through research and innovation, Atlantic Technological University and higher education, enterprise development, rural economic diversification, tourism and the blue/green economy.
- Transitioning to a low-carbon and climate-resilient region through renewable energy, sustainable mobility, biodiversity protection, flood management, circular economy principles, protection of natural landscapes and ecosystems.
- Creating healthier, more inclusive and attractive places through regeneration, housing delivery, public realm improvements, recreation and outdoor amenities, cultural development, access to services and social infrastructure.

[68] https://www.nwra.ie/pdfs/NWRA-RSES-2020-2032.pdf

- Supporting rural regeneration, island and coastal communities, agriculture, marine economies and place-based development, recognising the distinctive rural character of the region.

- Enhancing regional identity, heritage, language, culture and tourism assets as drivers of economic development and quality of life

A.5.4 Fáilte Ireland – Ireland's Hidden Heartlands Strategy[69]

- Lough Ree, Athlone, and the River Shannon identified as anchor destinations within the Hidden Heartlands offering immersive outdoor experiences.
- "Shannon Corridor Experience" to be developed as a key thematic proposition, connecting towns and natural sites through slow tourism and water-based activities.
- Investment in experience clustering around Hodson Bay, including lake cruises, kayaking, heritage interpretation, and family-friendly amenities.
- Support for local tourism enterprises to develop market-ready experiences aligned with the brand's "off-the-beaten-path" promise.
- Strengthening the destination identity through storytelling, digital campaigns, and coordinated visitor information.
- Encouraging year-round tourism with wellness, cultural, and food tourism offerings.

A.5.5 Waterways Ireland – Shannon Tourism Masterplan[70]

- Strategic development of the River Shannon as a unified tourism destination, with Lough Ree and Hodson Bay highlighted as priority nodes.
- Upgrades to quays, piers, marinas, and waterside facilities to enhance boating, angling, and leisure tourism.

[69] https://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/Ireland's%20Hidden%20Heartlands/Ireland-s-Hidden-Heartlands-Regional-Tourism-Development-Strategy.pdf
[70] https://www.waterwaysireland.org/getmedia/06ebcbb4-cb45-482d-949c-e2285307ba8c/Volume-1_Executive-Summary_Tourism-Masterplan-for-the-Shannon.pdf?ext=.pdf

- Creation of linked visitor hubs across towns and villages near the river, with improved connectivity between them via walking, cycling, and paddling trails.
- Enhanced public realm and access infrastructure, such as boardwalks, interpretive signage, and wayfinding systems.
- Protection and celebration of the river's natural and cultural heritage, with integrated environmental safeguards.
- Community engagement and training programs to support local participation in water-based tourism.

A.5.6 Roscommon Local Economic and Community Plan (LECP)[71]

- Prioritisation of tourism as a key economic driver for rural regeneration and job creation.
- Support for place-based development initiatives around Hodson Bay, Ballyleague, and Lanesborough.
- Enhancement of recreational infrastructure to attract visitors and improve livability (e.g., blueways, lakeside parks, trails).
- Promotion of cross-border cooperation with neighboring counties, particularly along the Shannon.
- Support for social enterprises and community-led tourism, especially in areas under-served by traditional industry.
- Integration of cultural programming and festivals to animate town centers and heritage sites.

A.5.7 Roscommon Tourism Strategy[72]

- Development of signature experiences based on the natural landscape (e.g., Lough Key, Lough Ree, Shannon Blueway).

[71] https://www.roscommoncoco.ie/en/services/community/community-grant-schemes/local-economic-community-plan-2023-2029/lecp-2023-2029.pdf
[72] https://www.roscommoncoco.ie/en/services/tourism/recreation/tourism-strategy-/

- Enhancement of accommodation capacity, especially around Hodson Bay and the Lough Ree shoreline.
- Expansion of trails and outdoor activities, including hiking, biking, and paddling experiences, linked to local storytelling.
- Support for seasonal and niche markets including angling, birdwatching, genealogy tourism, and health & wellness.
- Strengthening of visitor services and amenities, including digital tools, local guides, and signage in rural areas.
- Collaboration with regional stakeholders to create multi-day itineraries and visitor loops that include Athlone, Boyle, Roscommon town, and Lough Ree.

A.5.8 Athlone and Westmeath Tourism Strategy[73]

- Athlone positioned as a gateway to the Hidden Heartlands and Shannon tourism corridor.
- Development of Hodson Bay and southern Lough Ree as activity hubs with opportunities for eco-tourism, sailing, and lake exploration.
- Creation of integrated tourism trails, such as heritage, food, and spiritual routes linking Athlone with Roscommon's rural attractions.
- Enhancement of the visitor experience in Athlone town through improved navigation, public spaces, and interpretive points along the Shannon.
- Joint marketing campaigns and regional festivals/events to attract domestic and international tourists.
- Investment in sustainable mobility options (bike hire, public transport access to trails) to link urban and rural sites seamlessly.

[73] https://consult.westmeathcoco.ie/ga/consultation/westmeath-tourism-strategy-2021-2027

A.5.9 Strategy for Future Development of National and Regional Greenways[74]

- A collaborative venture between Roscommon County Council, Westmeath County Council, and Transport Infrastructure Ireland (TII) aims to develop the Lough Ree Greenway linking Athlone, Ballyleague/Lanesborough, and Roscommon Town. The objectives are to enhance sustainable economic development, tourism, and regional connectivity, promote active travel, and support environmental appreciation.
- Phase 1 (Concept & Feasibility): Public consultation held in March 2023 to outline study areas. Phase 2 (Options Selection): March–April 2025 saw route corridor options presented with public feedback gathered.
- The Lough Ree Greenway will connect with existing networks such as the Old Rail Trail Greenway (Athlone–Mullingar), Royal Canal Greenway (Longford–Maynooth), and Galway–Dublin Greenway. Future extensions may link Athlone to Glasson and Ballymahon.
- Roscommon County Council aims for an interconnected county-wide network, potentially extending from Athlone northwards to Tarmonbarry and Strokestown.

A.5.10 Conclusion

This strategic overview provides a roadmap for transforming the Roscommon–Athlone–Shannon corridor into a sustainable inland tourism destination of national significance. The shared vision centres on enhancing infrastructure, celebrating natural assets, empowering communities, and offering authentic visitor experiences that respect the environment and reflect the identity of Ireland's Hidden Heartlands.

The Hodson Bay Waterfront Park development has the potential to become an anchor in the delivery of that vision, providing all aspects of the desired regeneration of water and landscape as destination amenity for visitors and locals alike. The proposed introduction of an active travel hub, while a departure from the traditional access to Hodson Bay which is typically by car, will offer useful insights into the uptake of environmentally and health-

[74] https://assets.gov.ie/static/documents/strategy-for-the-future-development-of-national-and-regional-greenways.pdf

conscious travellers. Enhanced boat access will provide proof of concept for a wider variety of water transport options with the potential to increase water-based access contributing to the synergy on site of destination worthy experiences.

APPENDIX 6: AUDIT OF MIDLANDS' WATERBASED EXPERIENCES

Location	Soft Adventure	Hard Adventure
Banagher (River Shannon)	Mid Ireland Adventure (Banagher Marina) offers kayak & SUP rental, guided kayak safaris, SUP safaris and bike rental nearby. Carrickcraft offers self-drive boat hire on the Lower Shannon, with routes reaching Lough Derg and Clonmacnoise. Many public fishing spots along the Shannon for boat-based pike and coarse fishing. The popular municipal facility in Banagher is a concrete pool on the Shannon River itself, not open water.	Birr Outdoor Education and Training Centre (Shannon SUP route) offers outdoor education courses to groups of people of all ages and abilities, including challenging SUP trips and higher-intensity river paddling. Sub-aqua Club - Shannon-side scuba diving and search operations (Banagher Sub-Aqua Club), as well as snorkelling and scuba training.

Lough Derg	Kayaking/SUP/pedal boats are available via UL Activity Centre in Killaloe and Lough Derg Aqua Splash inflatable park at Dromineer. Lough Derg Yacht Club in Dromineer offers recreational and family sailing. Abundant fishing and boating, with self-drive launches, traditional cruising and shoreline angling. Dromineer (and Ballycuggeran) Water sport facilities under construction. The Lough Derg Way is a long-distance lakeside walking and hiking trail (68 km) that connects to water-based stops along the route.	The Lough Derg Sailing Club Racing offers competitive dinghy racing on the lake. Adventure events, Portumna Forest Marathon and Quest Lough Derg.

Cavan Lakes	Cavan Adventure Centre offers kayaking, canoeing, SUP and guided boat tours exploring Lough Oughter. Campsites and many wild swimming spots Lake fishing	Ramor Water Sports on Lake Ramor offers regular sailing and water-skiing. It also hosts the Watersports Inclusion Games, an annual award-winning, free multi-water sport event for all abilities/disabilities from the physical, intellectual, sensory and learning spectrums and those who experience barriers accessing mainstream sport. The event caters for all ages, and allows participants, together with family and friends, to access sports like sailing, canoeing, kayaking, rowing, paddleboarding, powerboating, motorboating, dragon boating, waterskiing and more. The facility is also currently raising money to build a fully accessible pontoon.

Tarmonbarry (Shannon Blueway)	Banagher base offerings extend up to Tarmonbarry via the Shannon Blueway network: guided canoe/SUP routes, Blueway signage, picnic & trail infrastructure. Keenan's of Tarmonbarry offers kayak rentals and has secure parking for privately owned kayaks. Tarmonbarry has a marina and provides a base for boat trips and cruising on and around the Shannon. Home to the Tarmonbarry Coarse Angling Centre, the village is a well-known fishing destination, especially for bream and roach, but also pike.	Tarmonbarry is well known for its whitewater wave, formed by a set of sluice gates on the river. Fast and steep, the wave is created by water flowing over a concrete slide, with deeper water and unpredictable currents underneath. The wave makes the village a popular location for kayaking and canoeing.
Lough Ree	Lough Ree Access for All boat has adapted boating access for users with disabilities or limited mobility. Self-guided kayaking routes, with mapped tours based on popular Shannon–Inny circuits.	Lough Ree Sub-Aqua Club offers dive training and lake search activities. As a member’s club it offers scheduled activities for members rather than one-off offerings aimed at tourists. Lough Ree Yacht Club (in Coosan, Athlone) offers traditional sailing with racing fleets (Optimist, Lasers, Shannon One Design).

APPENDIX 7: OVERVIEW OF WI MARINA INFRASTRUCTURE & USE

This is a summary review of mid-sized marinas (ca. 50 berths) development and managed by Waterways Ireland along the Shannon Navigation and its three main lakes: Loughs Ree, Derg and Allen is by way of setting the proposed new marina at Hodson Bay in context and supporting assumptions on utilisation to contribute to form a perspective on the potential future use at Hodson Bay Marina Park.

Drawing on public reviews (e.g. Google, TripAdvisor) and documents published by Failte Ireland, Waterways Ireland and others, we briefly explore consumer sentiment around cruising activities along the Shannon, as well as key related issues such as the seasonality of cruising/boating activity, the types of visitors who use marina facilities, and wider trends and developments in tourism and waterways that may influence demand for marinas.

For the purposes of relevance to the Hodson Bay Waterfront Park development, the marina review includes permanent facility managed by Waterways Ireland with designated berths, and where visitors can avail of a dedicated services block with showers and/or toilets, as well as other facilities, which vary between locations. At all Waterways Ireland marinas, visitors use a smart card system to access services like washing, laundry and power. The cards can be purchased locally.

Some, though not all, of these marinas offer pre-booking. Where it is available, there is no single system; visitors book by phone or online depending on the marina in question. Generally, visitors do not book a berth ahead. there is space and they comply with mooring limits, visitors can just turn up and berth on a first-come, first-served basis. If there is no capacity, which can happen at busy times, especially the peak months of July and August, they move onto the next marina.

Exceptions to this are mooring up for the winter season, mooring for longer than 5 consecutive days (after which a charge applies), or have an unusually large vessel that may require more than one berth.

There is no single, publicly available, verifiable dataset that reports berth-level or percentage occupancy rates for individual marinas along the Shannon River or its lakes. Reasons for this include:

- Many berths are informal or mixed-use, not managed like coastal marinas with commercial occupancy reporting. For example. even in instances where the number of berths is clearly stated, e.g. 50, the marina cannot always accommodate the stated number of boats as larger vessels can take up two or more berths. Equally, if boats are smaller, the marina can accommodate more than the stated number of berths might suggest. Stays of up to five days are free of charge at public marinas, with boats coming and going regularly, making monitoring numbers more difficult.
- Waterways Ireland focus on infrastructure capacity and strategic projections, not berth utilisation statistics.
- Cruise hire usage and private boat ownership data are recorded in different systems (e.g., hire company bookings, lock counts) rather than marina occupancy.
- There is no single booking or monitoring system for berths or moorings.

The absence of a complete dataset is a known gap in the available data that is acknowledged in official planning documents. What is available are system-wide capacity figures, qualitative statements about congestion and demand, investment justifications that rely on persistent high use of marinas, and limited quantitative proxies, such as winter moorings, fleet size and hire-boat usage.

System-wide capacity vs demand

Shannon Tourism Masterplan 2020–2030

Published by Waterways Ireland & Fáilte Ireland in 2020, this plan states that there are ca. 4,500 berths across 58 marina/mooring locations on the Shannon navigation. Most of these are in public and private moorings, as well as private marinas; public marinas are a relatively small portion overall. There are also ca. 8,400 registered boats associated with the Shannon system (both private and hire vessels). Of these, ca. 224-230 are available for cruise hire.

While the plan explicitly acknowledges that demand exceeds supply at key locations, particularly in peak season, Waterways Ireland do not currently track marina occupancy levels.

Official statements on utilisation

Oireachtas Committee of Public Accounts – Waterways Ireland evidence (July 2024)

In this meeting, senior Waterways Ireland officials stated that:

- Newly developed or expanded marinas (e.g. Lough Key, Carrick-on-Shannon, Connaught Harbour) are "fully utilised" during the main season
- Investment decisions were based on persistent berth pressure, not speculative demand

Winter mooring uptake (quantitative) - Parliamentary Question (January 2020)

Verified data:

- 155 boats availed of official winter moorings across the Shannon Navigation and Shannon–Erne Waterway in winter 2021–2022

This matters because winter moorings represent baseline, non-tourism demand, and these users typically occupy the same marinas year after year. While still not a percentage, this is hard usage data, not inference or assumption.

Cruise-hire Utilisation

Waterways Ireland/Fáilte Ireland tourism performance data (Hidden Heartlands)

- Hire boats on the Shannon are typically operational 16–18 weeks per year
- Peak concentration is May–September, with 42-43% of business in July and August
- Hire bases cluster demand around Carrick-on-Shannon in Co. Leitrim, Portumna in Galway, Banagher in Co. Offaly and Dromineer in Co. Tipperary.

This does not equate to marina occupancy but does illustrate how visitor berths are clustered in specific hubs.

Mid-sized marinas along the Shannon Navigation

Table A7.1 below sets out public marina of comparable scale within the Shannon Navigation and the amenities they offer. Details have been taken from marina websites and Waterways Ireland, in particular the Shannon Navigation Guide.[75] Mid-sized, in this case, ranges from 30+ to 70 berths, with the bulk sitting at around 50, as per the capacity at the proposed marina at Hodson Bay.

75 https://wwi.maps.arcgis.com/apps/webappviewer/index.html?id=637dbe0c3ec64403b6e1d8dcf7ed78fa

Table A7.1 Mid-Scale Public Marina’s

Name/Location	Facilities Available
Lough Key, Co. Roscommon	54 berths plus a service block. • Toilets, showers and electricity charging • Lakeside Café with views over Lough Key and Castle Island from indoors or from the outdoor deck area.
Carrick-on-Shannon Marina, Co. Leitrim	28 berths plus a service block. This marina was recently refurbished by Waterways Ireland
Ballyleague Marina, Co. Roscommon	Ca. 30 berths plus a service block. A review on Facebook says, ‘facilities are excellent.’
Athlone Marina, Athlone, Co. Westmeath	Ca. 70 berths plus a service block, private landscaped garden, security service (operates between 08.00 and 24.00.)
Shannonbridge, Co. Offaly	33 berths with • Public quay wall and jetties for visitor mooring • Fresh water and electricity (seasonal) • Toilets and showers via nearby service blocks • Car parking and access to local village amenities Works are underway to increase capacity and enhance facilities as part of Shannon tourism development plans.
Terryglass Marina, Terryglass, Co. Tipperary	45. berths, with • BBQ & Picnic facilities • Playground • Slipway • Toilets and showers
Dromineer Marina, Lough Derg, Co. Tipperary	44 berths plus service block. Marina is next to Dromineer Harbour

Garrykennedy, Lough Derg Co. Tipperary	28 to 30 berths (reports vary). Sited next to a council harbour filled with mostly local boats, this marina has: • Slipway and new floating jetties • Service block, with toilets, showers and washing/drying facilities, all of which require a Smart card (can be purchased locally)
Mountshannon, Lough Derg Co. Clare	55 berths plus service block
Portumna Castle Harbour, Co. Galway	Ca. 30 berths and other facilities as per Connaught Harbour below • Non-tidal with modern, refurbished, concrete 'submarine pen'-style berths. • Toilets, showers, launderette, and electrical power.
Connaught Harbour, Portumna, Co. Galway	Ca. 30 berths. Recently (2024) redeveloped and expanded for public moorings. Formal berth count varies with configuration but has been expanded under recent developments. • Moorings with water and electricity connections • Toilets & showers (via smart-card service blocks) • Picnic & seating areas, EV charging parking and Blueway trail connection Access to Lough Derg and broader Shannon Navigation

Satisfaction ratings of the marinas and the facilities they offer are highly rated overall with the marina's cited here achieving a minimum of 4.6 / 5 satisfaction rating in reviews.

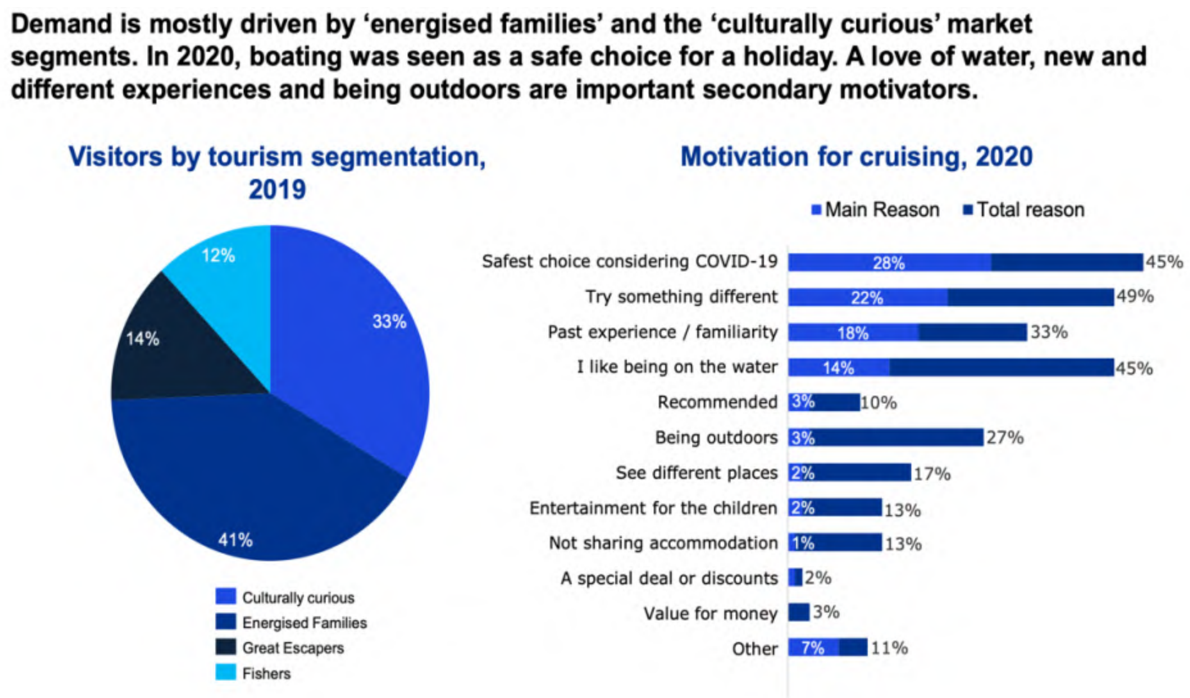
Cruising on The Shannon: Demand, Capacity and Potential

Cruising on the Shannon remains popular, although there has been a significant decline in the size of the cruise hire fleet since the peak in the 1970s and 1980s – from 530 boats to ca. 230 today. The Irish Boat Rental Association whose members account for 220 of the hire fleet report cruise hire business worth €22 million and an estimated €19 million in additional spend annually. It has the potential to be an important utilisation and economic contributor to any destination development scheme.

Hire boats represent less than 3% of the total number of boats registered on the Shannon, however, with the vast majority being privately owned. Unlike other large rivers in Europe where cruising and boating are popular, traffic on the Shannon remains low. The relative lack of crowds is a key part of its appeal, with many reviews, even in peak season, highlighting the quiet, the unspoilt countryside and the natural beauty of the river and its environs.

Demographics

The following illustration is taken from a 2022 feasibility study[76] carried out by KPMG for Failte Ireland entitled Feasibility Study on the Future Development and Greening of the Cruise Hire Sector.



In terms of visitor demand, roughly 50% comes from the domestic market and the rest from overseas, particularly Germany, the UK and Switzerland. Germany makes up ca. 50% of overseas visitors, though that number has been in decline in recent years according to Waterways Ireland (see Oireachtas report).

76 https://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/Ireland's%20Hidden%20Heartlands/feasibility-study-on-the-future-development.pdf

There is broad agreement that significant potential exists to develop the cruising offering further, particularly as part of a more integrated approach to tourism. Ireland's Hidden Heartlands Regional Tourism Development Strategy 2023 – 2027, for example, has identified growing "the appeal of cruising on the Shannon and the Shannon-Erne beyond the German-speaking and domestic markets, into southern Europe and other parts of northern Europe" as a key priority, which would involve, among other measures, adding more cruise boat hubs and facilities.

Lock Figures as a Proxy for Capacity & Demand

Boats must negotiate locks along the Shannon and presently lock passage figures are the only data captured by Waterways Ireland. They can be reliably used as a proxy indicator of traffic volume on the river and its various lakes.

From Hodson Bay, the nearest locks are located where the Shannon flows into and out of the lake – respectively, at Tarmonbarry to the north and Athlone to the south. Waterways Ireland recorded lock passage for Athlone and Tarmonbarry for years 2020 – 2024 are reported in Table X below.

Table A7.2 Lock Passage 2020 - 2024

	2020	2021	2022	2023	2024
Athlone	3,851	5,699	5,710	4,757	5,122
Tarmonbarry	2,973	4,043	4,111	3,482	3,056

The significant jumps in traffic in the years 2021 and 2022 – in the region of 20%+ - reflects the upsurge in demand that occurred during the Covid-19 pandemic, when outdoor pursuits were widely considered a safer option for holidaymakers, and travel abroad was difficult due to restrictions; people remained in Ireland and chose a 'staycation' instead.

While figures at Tarmonbarry lock have returned to 2020 levels, the numbers passing through Athlone lock have steadied at ca. 20% above 2020 levels and only 10% below their 2021-22 peak. This is in an environment where, in recent years, according to Waterways Ireland the number of boats registered on the Shannon has gone from 6,000 to 9,000 – a jump of 50% - yet lock passage figures have reduced.

One possible explanation for these apparently conflicting figures – the number of boats rising, but lock usage falling – is the changing landscape of cruising. As detailed below, the cruising community now favours shorter stays over week-long or two-week cruising holidays. Lough Ree is large, with much to see and enjoy both on and around the lake, and it is certainly possible that it offers sufficient attractions for cruisers coming from or based in Athlone to remain on the lake for the entire duration of their 2- to 3-day cruise rather than move further north or south. This may help explain why Athlone lock passage figures have remained high despite the overall reported reduction in lock passage figures.

Lough Ree – and Athlone – is also within half a day's cruising of one of Ireland's most important historic sites, the ancient monastic settlement of Clonmacnoise, where the Office of Public Works is currently[77] upgrading the visitor centre into a fully accessible, modern facility. Combined with ongoing investment in promoting the Hidden Heartlands region under the Shannon Tourism Masterplan, this suggests that there is still untapped capacity for cruising and other water-related activities on and around Lough Ree, especially given growing global trends such as eco-tourism and nature-based holidays.

Trends & Developments

Market for Cruiser with Increased Capacity

For many years, the size of cruise boats remained relatively stable at 4-6 berths, but in recent years (since 2022), operators have been reporting growing demand for larger boats with more berths. LeBoat/Emerald Star, for example, now offers boats that can accommodate 8-10+ people sleeping, with 'premium' features including covered decks and even barbecue hotplates. This may well reflect the move from week- or fortnight-long cruising holidays to shorter stays of 2, 3 or 4 days.

[77] https://irishmuseums.org/news/11-2m-investment-announced-for-four-opw-sites#:~:text=Emo%20Court%20–%20€187k%20towards, away%20from%20carbon%2Dintense%20activities.

1. Changes in User Behaviour

Hire and usage patterns have changed, most notably from what would have been a traditional two-week holiday to shorter stays of three to four days. This impacts the use of marinas and locks, including any fees that may apply. In a meeting at the Oireachtas in July 2024, Eanna Rowe, Operations Controller for Waterways Ireland, said:

"Many people are taking short breaks rather than the two-week cruise hire break. The cruise hire industry itself has restructured. The number of boats that are registered on the Shannon has increased over the past 20 years from 6,000 boats to over 9,000 boats but the user patterns are different. Those private boats do not necessarily use our locks. If I have a boat in Killaloe which I use at weekends, I will stick to Lough Derg and I will not be using a lock. When we look at lock passage figures, they have certainly reduced."

2. Greening the Fleet

With sustainability now a priority for both consumers and government, there is pressure, as well as desire, to make cruising a 'greener' activity.

One of the easiest ways to do this is to replace diesel, the principal fuel for motorboats, with a more sustainable fuel. The Irish Boat Rental Association confirm that this process is already well underway, with many of the hire fleet already using HVO achieving 90% reduction in omission.

There is also growing demand for electric charging for more modern boats. In fact, a strategy[78] has been developed (with stakeholders including Waterways Ireland, Fáilte Ireland, inland waterways associations and hire operators) to install electric charging points for electric cruisers along the Shannon Navigation. Under this plan, five high-capacity charging points specifically for electric boats are expected to be installed by 2026, with the number potentially rising to 10 by 2029 as part of efforts to green the river cruiser market.

[78] https://www.irishtimes.com/ireland/2024/10/18/charging-points-for-electric-cruisers-to-be-installed-along-the-shannon

3. Proposed Revisions to By-Laws governing Ireland's Waterways

Ireland's waterways (canals, lakes, rivers) are governed by a set of by-laws that Waterways Ireland CEO John McDonagh has stated are "not fit for purpose." The by-laws governing canals have not been changed since 1984, while the ones governing rivers and lakes have not been updated since 1994. Today, however, there is new legislation[79] before the Oireachtas which is proposing to overhaul the by-laws.

For both canals and rivers, the existing by-laws predate the establishment of Waterways Ireland in 2000 and therefore take no account of all the upgrades and development works that it has carried out since. The failure to revise them also means Waterways Ireland is still 'playing catch-up' in terms of addressing and regularising permit fees as well as the many 'encroachments' onto the Shannon, which range from cut-away sections of riverbank to allow for a single private boat to be moored, to large private marinas that do not have planning permission because at the time of being built, it was not required. In 2024, it even established a new unit[80] to rectify the situation.

As John McDonagh says:

"Part of the problem is that the by-laws are over 30 years old. They are out of date. If we were to take one simple number, such as the permit fee, it is at present €127, which at the time would have been £100. That is how long ago we are talking about. If that were inflated, it would probably be approximately €300 now. The impact is that with no by-laws in place and, let us say, no revisions every five years, with five times no revisions, suddenly we are trying to go from a position of 30 years-plus to now. That in itself, is a big step change for everybody and I accept that."

The proposed new by-laws[81] are designed to recognise the progress made on developing Ireland's waterways, and to future-proof them to allow for the sustainable growth and expansion of cruising as well as other water-related activities and initiatives, e.g. the new River Shannon Discovery Points Initiative, and a new 'Camino' for kayaks and other small pleasure craft proposed

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[79] https://www.oireachtas.ie/en/debates/question/2025-03-19/912/

[80] https://afloat.ie/inland/inland-waterways/item/64694-waterways-ireland-to-tackle-unauthorised-developments-on-inland-lakes-and-rivers#

[81] https://www.waterwaysireland.org/getmedia/2d127ea9-79ac-4eb5-b3535899c5e4c826/Waterways Ireland-Annual-Report-and-Accounts-2023-(English).pdf?ext=.pdf

in the Upper Shannon, Shannon Erne and Border Destination and Experience Development Plan (DEDP) 2025-2030, a sustainable tourism initiative launched by Fáilte Ireland in January 2025.

The new by-laws include provision for:

- New serviced and un-serviced canal permits for houseboat communities
- Additional high-quality houseboat mooring zones (these will require planning permission)
- In-water inspections and insurance requirements for boats
- The introduction of an annual registration process; precise fees are still to be confirmed.
- The abolition of lock passage fees
- A requirement for life jackets on the water and safety equipment on boats
- Speed limits for bicycles and scooters on Greenways and Blueways
- Certification for vessels used for commercial purposes
- Designated zones for tents and caravans
- Measures to protect the environment

APPENDIX 8: SUMMARY CONSTRUCTION SCHEDULE

Construction Phasing and Timing

It is estimated that the construction phase of the Proposed Development will take approximately 30 months to complete. In the interest of minimising disturbance to breeding birds, construction will not commence during the bird breeding season which runs from the 1st of March to the 31st of August inclusive.

The construction schedule for the project will primarily depend on the availability of financial resources, with the assumption that full funding will be secured for the timeframe specified by RCC. Given the sensitive nature of the site and its importance as a tourist attraction, it is expected that the construction works will be undertaken in a phased approach.

The construction phase can be divided into specific work elements:

1. Upgrade and extension of existing parking spaces and site roads– 9 months;
2. Pedestrian Active Travel corridor enhancements – 5 months;
3. Demolition of existing water sports building and construction of new Water Sports Pavilion Buildings - 21 months;
4. Construction of Marina Redevelopment and Extension – 6 months;
5. Public Realm upgrades including landscaping – 9 months.

Note that overlap is expected between the commencement of certain phases.
Construction operations will be confined to the period 0700—1900 h Monday-Friday and 0800-1700 h Saturday.

Construction Sequencing (refer to main body of EIAR for detail)

phases, 1) enabling works, and 2) construction works. The main task items under each of the two phases are outlined below.

- Enabling Works (including demolition of existing structures)
- Ensure that all pre-construction environmental measures are
- implemented/conducted e.g. implement Archaeological recovery works that may be needed, surface water protection measures (including installation of cofferdam and silt fencing) or any specific pre-construction planning conditions;
- Clear and hardcore areas for temporary construction compounds and site offices. Install same;
- Provide bunded area for oil tanks for refueling;

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- Set up the construction site enclosures. Protective hoarding will be erected around the perimeter;

- Removal of trees and vegetation in areas for construction. This will be carried out outside of breeding bird season from March 1st to August 31st inclusive;
- The demolition of the existing building used by Bay Sports and the adjacent toilet block building will be undertaken. Temporary structures such as existing marquees on site will also be removed;
- Commence site clearance and topsoil stripping;
- Regrade to foundation and road formation levels;
- Installation of utilities and services;
- The proposed surface water drainage network will be installed. Further information can be found in Section 4.3.6 of the Masterplan.
- The proposed foul water collection system will be installed. Further information can be found in Section 4.3.6 of the Masterplan.

Construction Works

- Construct road and footpath upgrades
- Construct parking areas. Removal of waterfront parking spaces, realignment of Marina car park, extension of northern car park;
- Lay foundations;
- Construction of Water Sports Pavilion buildings;
- Construction of Marina extension and Marina services block building;
- Construction of swimming changing shelter;
- Connection to public services – public water supply, sewerage system and electricity network;
- Landscaping and Public Realm upgrade areas completed including installation of lighting scheme;
- Complete all site finishes; and
- Completion of any testing and commission services within the development.

The phasing and scheduling of the main construction task items are outlined in Figure 4-2 below, where an indicative timeline for construction works has been shown. This timeline may be subject to review and changes following the receipt of planning permission.

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