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Results from a short survey of Marina visitors and operators in Ireland

Michael Egan and Stephen Hynes

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SEMRU *Working Paper Series*

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Abstract

This paper presents the results of a survey of visiting boats to Irish marinas. Ireland's coast offers pristine waters and excellent sailing, which attracts many domestic and foreign boat owners to Irish marinas. A total of 82 visiting boats completed the survey. Questions were asked about the individuals on board each boat, the visitors experience in and around the marinas visited, the spend per boat per visit was €1883.69. In addition to this, it was found that the average spend per person per boat excluding children was €539.42 and the average spend per person including children was €513.73. Marina operators also completed a separate short survey the results of which are reported here as well.

Keywords: Ocean economy, Economic impact, Marine tourism industry, Marinas, Ireland

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1. Introduction

Tourism, including marine leisure, is one of the main economic activities that take place in a country's ocean economy (Vega et al. 2013). There are many different definitions of marine tourism and marine leisure. For example, Tourism Development International (2007) defines marine tourism as, the sub-sector of the tourism industry that is based on tourists taking part in leisure, holidays and journeys on coastal waters or their shorelines. Whereas, the Marine Institute (2005) defined marine tourism as all expenditure on seawater and freshwater activities, excluding travel and accommodation. Fáilte Ireland define marine tourism in Ireland using a wide definition which refers to marine and coastal tourism water based activities as well as the activities and services adjacent to the coastline. They estimated that in 2010, the tourism industry contributed an estimated €5.8 billion to the Irish economy or 10% of the overall value of the tourism sector in Ireland (Fáilte Ireland, 2010). As expected, all definitions of marine tourism have similar underpinnings. Marine leisure, on the other hand, refers to all activities undertaken by locals and tourists in marine areas, as outlined by Tourism Development International (2007).

Although the marine tourism industry in Ireland has not yet reached its full potential, it still creates significant contributions to the Irish economy; as can be seen in table 1. Failte Ireland (2009), found that 24% of domestic visitors and 14% of overseas visitors in 2007 participated in water related activities. In terms of boating activities, the Irish boat ownership per person ratio is very small compared to other nations. Ireland's boat ownership ratio is 1 boat for every 158 people whereas other nations have a much better boat ownership ratio, Germany is 1:108, the United Kingdom's ratio is 1:100, Italy is 1:67, France is 1:66, the Netherlands is 1:30, the USA is 1:16 and Sweden is 1:7 (Conlon, 2011). Therefore, it is clearly evident that Ireland has not reached its full potential with regard to the marine leisure industry.

Regattas or events have also proven to be a major contribution to the Irish economy. An example of the impact that these regattas/events can produce is given by Irish Sea (2009): the 2009 Volvo Dun Laoghaire Regatta total economic contribution was €2,349,204.07. In the same year, Galway held the 2009 Volvo Ocean Race stopover, which Our Ocean Wealth (2011) found generated €50 million for the Irish economy. Conlon (2011) estimated marina based boat owners spend to be €34,716,261.00 annually and the average overseas visitor to spend €192 per night, with an average stay of 3 nights. The impact of marine tourism can also be seen internationally, for example the British Marine Federation (2014) found the economic impact of UK boating tourism is bigger than the tourism contribution created from the London Olympics. These figures give a brief insight into the revenue that can be generated from marine tourism, regattas/events and marinas. Although the economic downturn affected the marine tourism market, it can still be seen that the marine leisure and tourism industry is a very important sector to the Irish economy and is one that should be developed to its full potential. Some economies depend mainly on marine based leisure tourism, e.g. Bermuda, as seen in Archer (1995). If it is possible for economies to derive such value from marine based leisure tourism the Irish economy should, without doubt, attempt to increase the size of the marine leisure and tourism industry so as to capitalise on what is arguably one of our greatest tourism attributes, i.e. the sea.

Table 1. The Impact of Marine Tourism on the Irish Economy

	Value
2007 Marine Leisure Tourism	€750 million
2008 Activity Tourism	€1.2 billion
2009 Volvo Dun Laoghaire Regatta	€2.3 million
2009 Volvo Ocean Race Stopover	€50 million
2011 Marina Based Boat Owners Spend P.A.	€34.7 million
2011 Average Overseas Marina Visitor Spend Per Night	€192

Sources: Failte Ireland Statistics, Collins et al. 2012, Irish-Sea (2009)

One way to encourage more marine leisure activity would be to insure the availability of easy and safe access to Irish marine waters. Marinas offer such safe and easy access to both domestic and visiting boat owners and yet their development has been slow. There are currently only 23 marinas in Ireland with a capacity of 50 berths or more. The majority of these are on the east coast and over half of the west coast does not have a single marina of this capacity (from Kilrush to Lough Swilly). Given our exposure to Atlantic weather systems many boat owners are reluctant to sail in Irish waters but more might be encouraged to do so if they knew there was safe marina berths available all along the coast line. The marinas that do exist also offer good value for money to visiting boat owners. The average price of an annual berth in Ireland is €315 per metre in privately owned marinas and €172 in publically owned ones (Kean, 2014). This is well below the cost in other European countries.

This paper presents the results of a survey of visiting boats to Irish marinas. The aims of this survey was to collect information on the expenditure pattern of these visiting boats and other related information such as the characteristics of those on board, characteristics of the types of boat visiting, the duration of their trip, satisfaction with marina facilities, information on why they visited Ireland by boat in the first instance and how much money they spend while in Ireland. The paper also documents information on Irish marinas, such as marina details (e.g. number of berths, number of visiting boats per annum and overnight charge for a 38 foot boat), the services they offer, and details on total turnover.

2. The Survey

Surveys were designed to assess the economic contribution of marinas in Ireland and of the contribution of the visitors using such facilities. Those who completed the survey were either marina visitors (boats) in Ireland or marina operators within Ireland. In order to assess the economic impact created by visitors and marinas, two different surveys were designed: (1) a ‘Boating Holiday Survey Questionnaire’ for visitors and (2) a ‘Marina Operator’s Survey’ for marina operators.. The main objectives of the ‘Boating Holiday Survey’ were to determine how many boats, both domestic and international visit Irish marinas; where do the boats come from; the duration of their trips; why they chose to visit Ireland; how satisfied they were with the services provided at Irish marinas; and how much money they spent during their visit, along with some other objectives. The ‘Marina Operator’s Survey’ gathered details on each marina, what services and facilities they offer, and information on areas such as their turnover.

In order to collect accurate and relevant data, the Irish Marine Federation asked 22 members of the Irish Marina Operators Association to get on-board for the study. All members agreed and were interested in the study. The next step, after contacting the Irish Marina Operators Association members, involved sending the ‘Boating Holiday Survey’ questionnaires and a cover letter, for visiting boats to read to each of the marinas. Marina operators were asked to encourage visiting boat owners and operators to complete the survey and detail the benefits of doing so to visitors. In addition to this, visits were made to several marinas to collect more surveys.

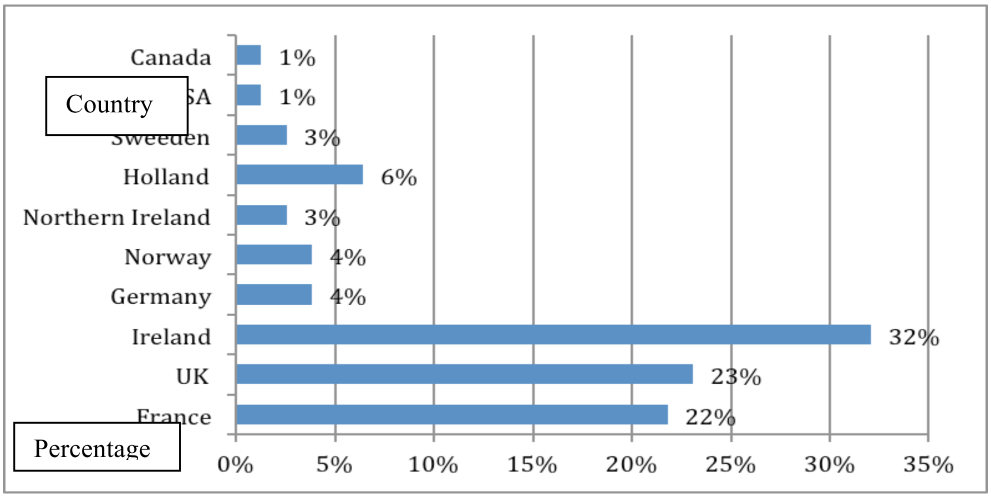
The ‘Marina Operator’s Survey’ was sent out to each of the participating Irish Marina Operators Association members. Marina Operators were asked to read the cover letter, so as to be aware of the importance of the survey, and send the survey back after having completed it. Similar to the visits made for the ‘Boating Holiday Survey Questionnaire’, some of the marina operators were contacted for face-to-face surveys.

3. Results

The survey results presented below are based on the response of 82 visiting boat operators. It was found that the average number of adults per visiting boat was 3.06, with a range of 1 – 13. It was identified that the average number of children per visiting boat was 0.15; the range of children per boat being 0 – 3. Based on the findings of the survey, the most popular type of vessel visiting Irish marinas was a privately owned sailing yacht. A total of 85.6% of respondents were using or had used a privately owned sailing yacht on their holiday, followed by 10.4% who were using or had used a privately owned motor boat, 2.6% were using or had used a chartered sailing yacht and 1.4% were using or had used a chartered motor boat.

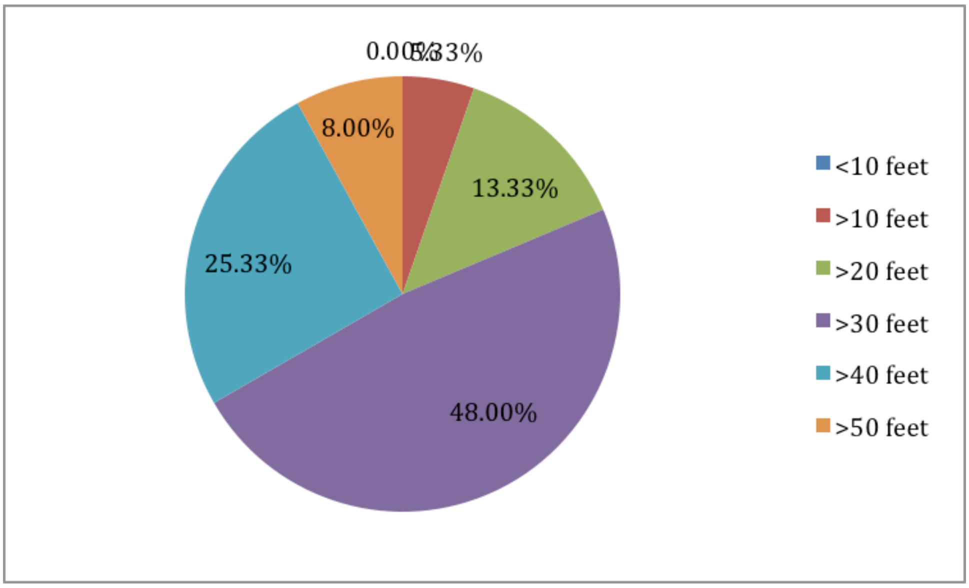
From the surveys, it was found that respondents were residents of 10 different countries. Referring to Figure 2, the highest proportion of visitors were domestic visitors, followed by France, then the UK and the remainder of the countries had a much smaller visitor rate. It is possible that France and the UK were the next most common visitors, after domestic, due to their proximity to Ireland. It needs to be kept in mind however that this is a very small sample and may not be representative.

Figure 2. Country of Residence – the percentage breakdown of visitors' by country of residence



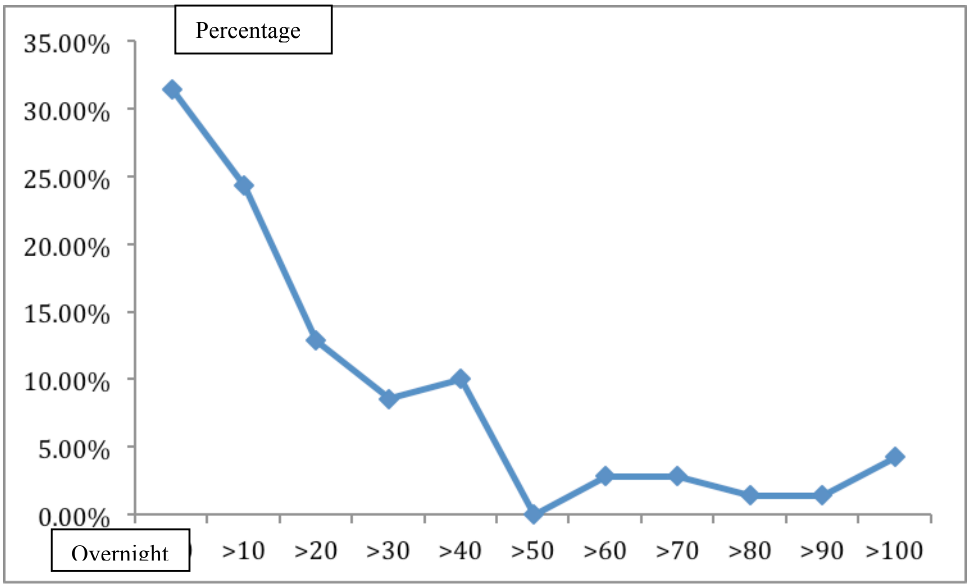
The survey also found that the most common boat sizes of visiting bots are 30 - 39 feet (48%) and 40 – 49 feet (25%) with some others coming in between 10 – 29 feet and over 50 feet – see Figure 3.

Figure 3. Approximate Boat Sizes – this shows what percentage of visitors used each boat size on their holiday



Respondents were also asked *"How many overnight trips to a marina/mooring/pontoon other than your resident marina/mooring/pontoon have you made in the past 12 months?"* By being aware of how long visitors spend away from their marina/ mooring/ pontoon could also help agencies, such as Failte Ireland, in designing holidays that would take different lengths of times in order to meet marine tourists' demands, e.g. short trips along the Irish coast or longer trips all around Ireland. It was observed that most visitors (31.43%) spent less than 10 nights away from their resident marina/ mooring/ pontoon in the past twelve months. The general trend shows that for every increase of 10 nights, the number of boats that were away from their resident marina/ mooring/ pontoon fell. There was a small rise at greater than 40 nights and greater than 100 nights, see Figure 4. It was found, through marina visits, that some visitors spent most of their time on the water or were completing a circumnavigation and hence this is why the percentage of nights away from resident marina/ mooring/ pontoon is a little higher at greater than 100 nights.

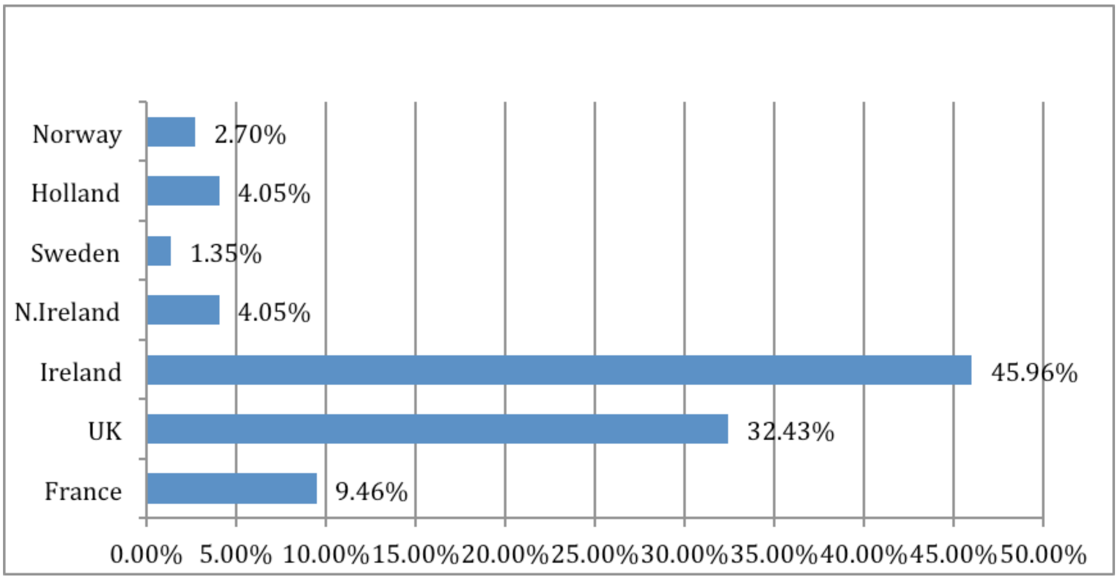
Figure 4. Overnight Trips to Non-Resident Marina/ Mooring/ Pontoon – the line chart shows the duration of visitors' holiday in Ireland



While visitors were asked what their country of residence is, it was also important to be aware of where visitors actually begin their trip. This is important as not all boat owners keep their boat in their region or even country of residence and the Irish tourism industry must also be aware of where visitors are coming from so as to make visitors transitions easier and be conscious of how to attract more visitors from these areas. It was essential to ask all survey respondents where they began their trip as some visitors, mainly from the UK, keep their boats in Ireland. It was also possible to find where Irish domestic visitors point of origin was, the most common points of origin were marinas in Cork and Dublin. Outside of Ireland and Northern Ireland, five other countries were noted as origin points. These other countries included France, the

UK, Sweden, Holland and Norway. Figure 5 gives further detail on where visiting boats are coming from.

Figure 5. Origin Point for Trip – this bar chart shows where visitors' point of origin is and the percentage of visitors who come from each country

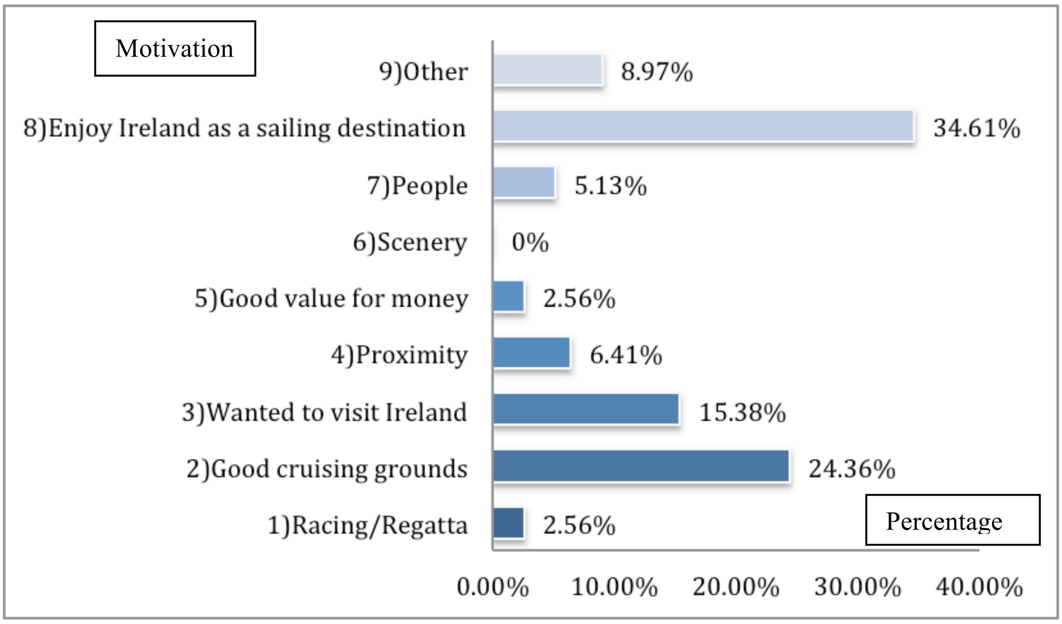


Respondents were next asked to firstly, fill in how many nights in total their trip in Ireland would be and secondly, how many nights they were spending at the marina where they received the survey. In response to the first part of the question, it was calculated that the average holiday duration per boat was 21 nights, with a range from 1 night to 90 nights.

The second part of the question, how many nights spent at a specific marina, determined that the minimum number of nights spent at a specific marina was 0 nights and the maximum number of nights spent at a specific marina was 26 nights. The possibility of 0 nights at a specific marina would suggest that the respondent was on a day trip to the marina. Day trips are common by domestic tourists when marinas act as stop off points for another marina nearby, e.g. Dun Laoghaire and Greystones. Day trips tend to consist of a trip to a nearby town or village, where boat owners can dock their boat and go into the local town or village for the day. The average number of nights spent at one specific marina by tourists is 5 nights. It was also established that the majority of visiting boats move from one marina to another during their trip, rather than just visit one marina and then return home or depart for another country.

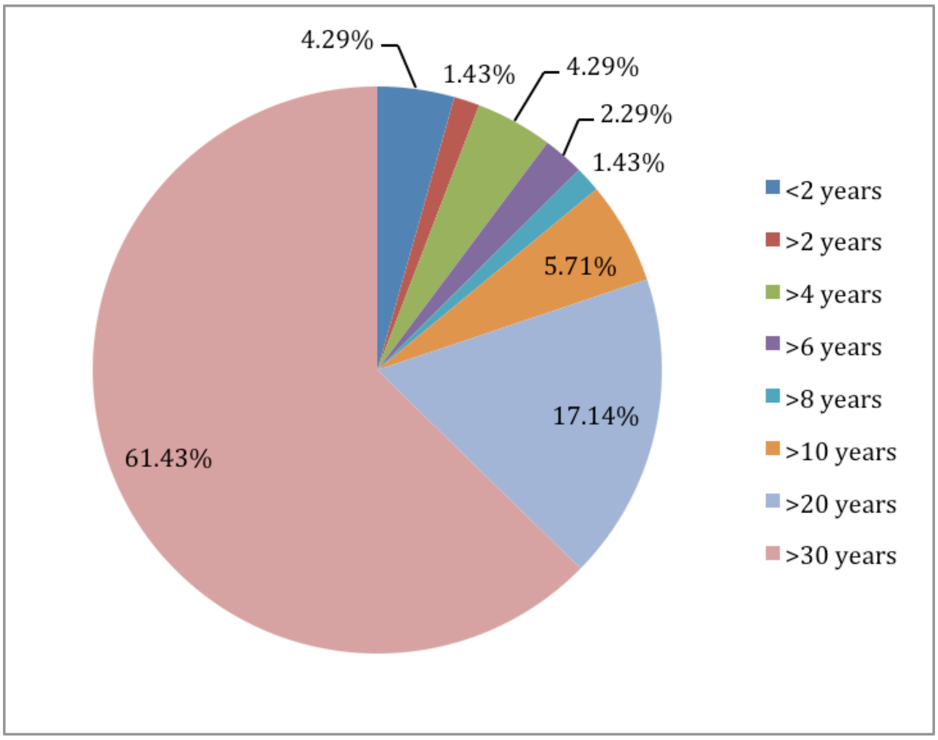
This next question on the question posed nine different options for visitors to choose from to describe why they chose to visit Ireland for a boating holiday. Having conducted several face-to-face interviews, it was discovered that most marina visitors chose Ireland for their boating holiday for several reasons, yet respondents were asked to just choose their one main reason for choosing Ireland. The most popular reasons for visiting Ireland were option 8 - enjoy Ireland as a sailing destination at 34.61%, followed by option 2, good cruising grounds at 24.36%. It is important to highlight the fact that option 6, scenery, was the only option that received 0 responses. Ireland is well known for its beautiful scenery and attracts thousands of tourists per annum; yet it was not the number 1 draw for any of the visiting boats in the survey.

Figure 6. Main Motivation for Boating Holiday in Ireland – the nine options from the survey are presented alongside the percentage of visitors who chose that option



The next question asked aimed to determine the level of competency that most tourists have when visiting Ireland, i.e. is it mostly boaters with a lot of years of experience or boaters with little experience. Again, having this type of question allows us to become aware of who visits Ireland and what facilities or services they may be looking for. It also allows us to design marketing strategies and attractions for our target market. From the results, it was found that the level of boating experience ranged from less than one year to over sixty years. It was found that most marine tourists to Ireland have more than thirty years of boating experience, 61.43%. Figure 7 shows the breakdown of Irish marine tourists' boating experience in years.

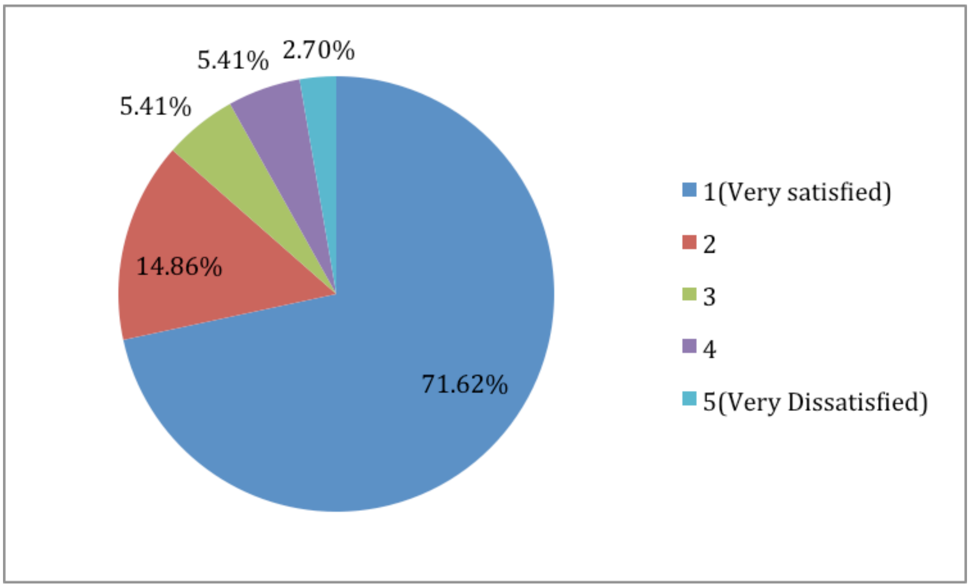
Figure 7. Approximate Years of Boating Experience – this shows the number of years visitors have been sailing for



In the next question, visitors were given a list concerning nine areas with regard to services and facilities at Irish marinas. The respondents were then given the option to rate their level of satisfaction with those services by ticking one number where 1 was very satisfied to 5; very dissatisfied, with reference to each area of concern. This question referred to the respondents overall experience of marinas in Ireland, so as to form a complete representation of marina services and facilities in Ireland.

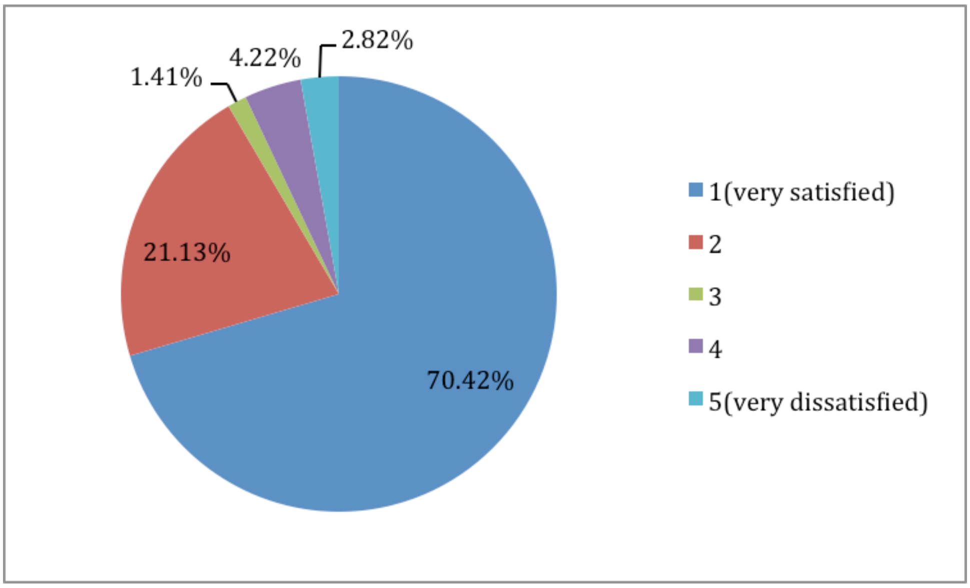
It was found that 71.62% of respondents were very satisfied with the availability of staff at the marinas they had visited. Some respondents added notes to their surveys about the staff's attentiveness and friendliness. Very few were very dissatisfied with staff availability, with only 2.70% selecting this option.

Figure 8. Satisfaction with Availability of Staff – the percentage breakdown of visitors' level of satisfaction with staff availability at marinas they have stayed at during their sailing/boating holiday



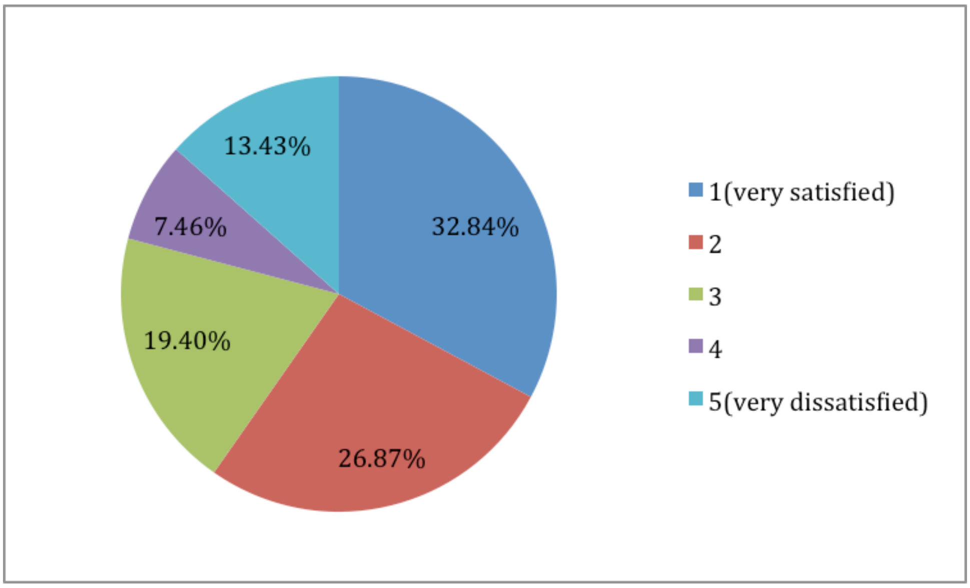
While the use of dinghy docks in marinas is not very common, shore access is still an important factor. Some 70.42% of respondents were very satisfied with shore access/ dinghy dock in Irish marinas. Only 2.82% of respondents were very dissatisfied.

Figure 9. Satisfaction with Shore Access/ Dinghy Dock – the percentage breakdown of visitors' level of satisfaction with shore access/ dinghy dock at marinas they have stayed at during their sailing/boating holiday



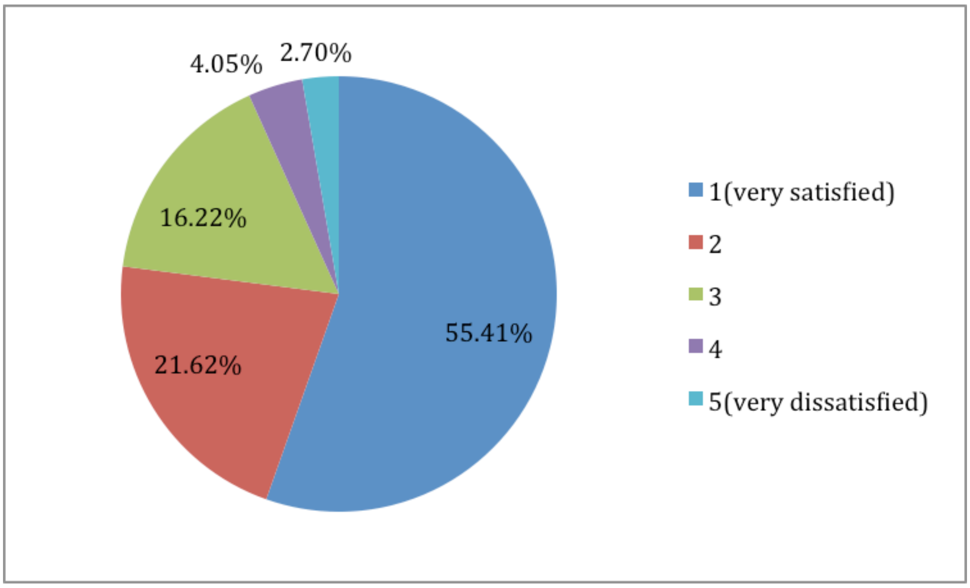
During marina visits, it was discovered that very few marinas offer petrol and diesel on site. However, the majority of marinas can source petrol or diesel delivery for customers. Yet, this was still highlighted as a disadvantage by respondents. This disadvantage was also noted by marina operators, who were aware of customers' demands and so had the development of petrol and diesel pumps in the pipe line for future development. As a result of this disadvantage, only 32.84% were very satisfied with the availability of petrol/ diesel and 13.43% were very dissatisfied with its availability.

Figure 10. Satisfaction with Availability of Petrol/Diesel – the percentage breakdown of visitors' level of satisfaction with the availability of petrol/diesel at marinas they have stayed at during their sailing/boating holiday



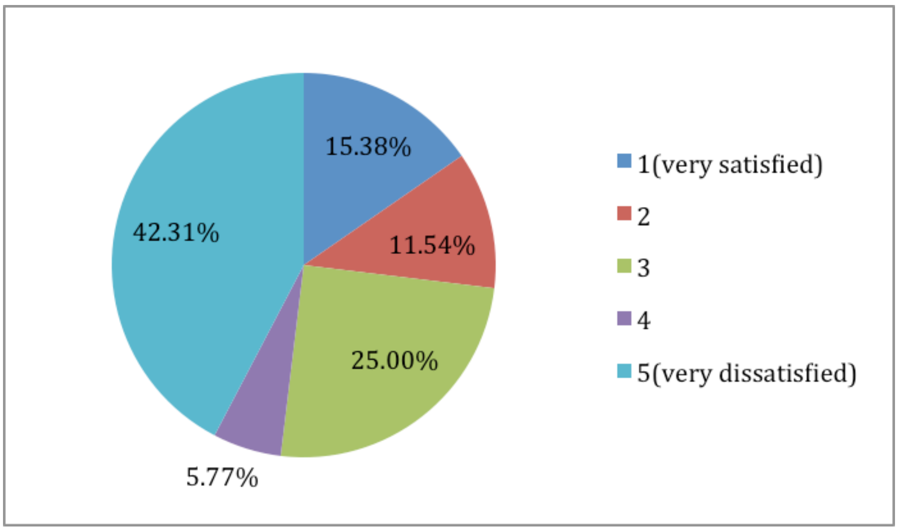
While visiting marinas, respondents identified that some marinas offer toilets and showers that are of high quality and are well maintained. Others do not offer such good facilities, whether they are of poor quality and/ or badly maintained. It is evident that the higher quality toilets and showers are provided at the more popular marinas. In addition to this, the larger marinas offer more toilets with some being offered at the marina offices and extras being provided elsewhere on the marina. Overall, 55.41% of respondents were very satisfied with the availability of toilets and showers, compared to only 2.70% being very dissatisfied with their availability.

Figure 11. Satisfaction with Availability of Toilets/ Showers – the percentage breakdown of visitors' level of satisfaction with the availability of toilets/showers at marinas they have stayed at during their sailing/boating holiday



The availability of pump out facilities in Ireland is very scarce, with very few marinas offering the facility. This fact could pose a problem for tourists who require the service but cannot avail of it. The end result of this issue could cause tourists not to visit the area again as the service is not available if required. Not unexpectedly, as a result of the low availability of pump out facilities, only 15.38% of respondents were very satisfied with the availability of pump out facilities; whereas, 42.31% were very dissatisfied.

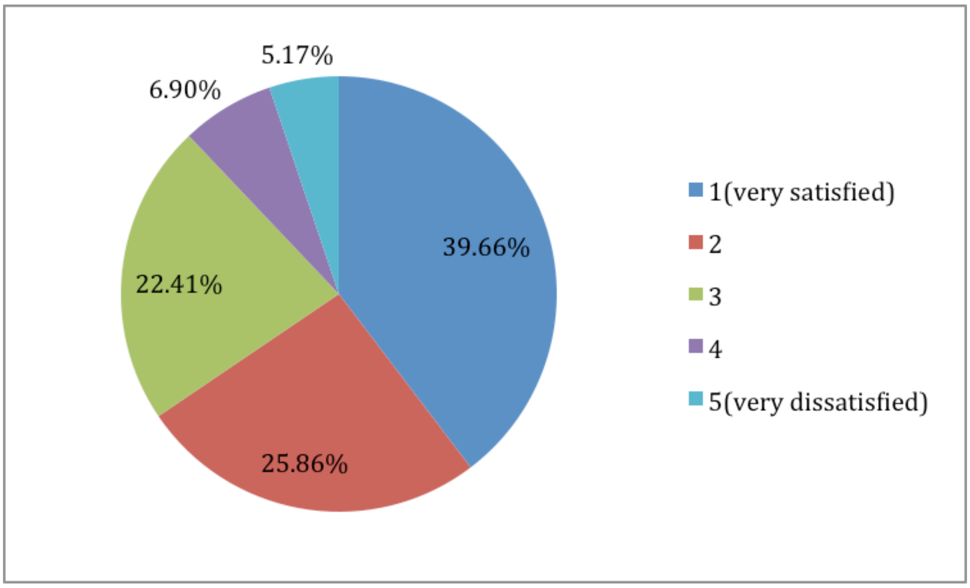
Figure 12. Satisfaction with Availability of Pump Out Facilities – the percentage breakdown of visitors' level of satisfaction with the availability pump out Facilities at marinas have stayed at during their sailing/boating holiday



While rubbish disposal is available at all marinas, the quality of the service was found to be mixed across the marinas. Some issues noted with the rubbish disposal in some marinas were the lack of bins, which led to overflowing bins, and the lack of recycling facilities. The results show that 47.89% of respondents were very satisfied with the availability of refuse facilities and rubbish disposal, compared to 4.23 being very dissatisfied. Visiting boats were also asked about their satisfaction with the availability of laundry services. 19.61% were very satisfied with the availability of laundry services and 17.6% were very dissatisfied with the services. The highest category of respondents, 35.29%, was half way between being very satisfied and very dissatisfied.

Most marinas have public transport in their vicinity, e.g. dart services, bus, etc. Some issues raised with regard to public transport were the costs and lack of frequency. These issues were more common in smaller and non-urban marinas. Yet, 39.66% of respondents were very satisfied with the availability of public transport and only 5.17% were very dissatisfied with its availability. It is important to have good public transport near marinas, as the majority of visitors do not have any mode of transport unless they rent a car. The provision of public transport also encourages visitors to spend money, e.g. shopping in towns or visiting attractions.

Fig.13 Satisfaction with Availability of Public Transport – the percentage breakdown of visitors' level of satisfaction with the availability of public transport at marinas they have stayed at during their sailing/boating holiday



Respondents were next asked about their expenditure pattern while in a marina. This identifies how much visiting boats are spending in the Irish economy and what they are spending their money on. Table 2 below, shows the average spends in each category per boat and the maximum spend in each category per boat. In addition to this, it was found that the average spend per person excluding children was €539.42 and the average spend per person including children was €513.73.

Table 2. Expenditure in € 2014

Categories	Average spend per category per boat € 2014	Maximum spend in each category €
Mooring/Marina Fees	320.10	1,500
Accommodation	30.24	600
Food & Drink	503.27	4,000
Entertainment & Sightseeing	96.19	1,100
Fuel	254.05	3,000
Transport in Ireland	53.85	500
Shopping	279.83	2,000
Boat Maintenance & Chandlery	198.94	6,000
Other Expenditure	85.67	2,500
Total	1883.69	11,000

Marina Operator's Survey' Analysis

This part of the paper details the findings of the 'Marina Operator's Survey'. The findings are only based on the response of 6 operators. The first section of the questionnaire asked respondents for information on their premises size and questions related to their berths, visiting boats and charges. The box below presents summary averages for each question across the 6 marinas.

Table 3. Marina Information

Questions	Average
Size of current premises	1.93km^2
No. of berths	229.17
No. of annual berths	155
Are visitors allowed to use vacant berths?	100% responded yes
Visiting boats p.a.	468.33
Typical visitor stay	3
Max. boat size you can accommodate	103.75 ft
Overnight berthing charge for a 38ft boat	€32.92

Marina operators were also asked if they offered any of the following services: office, club room, changing room/ shower facilities/ toilets, workshop, storage, boatyard, retail outlet, other. Most of these facilities were offered except for a club room, where only 2 out of the 6 offered this service, and a retail outlet, where only 16.67% offered this. Half of respondents also selected the ‘other’ category; some of the facilities included here consisted of: charter, bicycle hire and brokerage.

Associated businesses that operate from the marina

Respondents were also asked if any of the following associated businesses operate from the marina: eco-trips, sea angling, diving, sailing schools, and leisure trips. Table 4 shows the percentage of the 6 marinas that did have these associated businesses.

Table 4. Associated Businesses

Associated Business	Percentage of Marinas That Have Associated Business
Eco – Trips	33.33%
Sea Angling	50%
Diving	33.33%
Sailing Schools	50%
Leisure Trips	50%

Services offered by your boatyard, if marina has one

A total of 66.67% of respondents had a boatyard and the remainder had a boatyard in their locality. The results in table 5 only include the responses from those who have a boatyard.

Table 5. Services Offered By Boatyard

Services	Percentage of Marinas That Offer Service
Lift Out	66.67%
Wash Down	66.67%
Fuel	50%
Repairs	66.67%
Max. Boat Size You can Accommodate	56.67 feet

Marine activities

This section of the survey asked respondents questions on their turnover, operating expenses and number of employees. The average results are detailed below in Table 6.

Table 6. Marine Activities

Marine Activities	**Average**
Total Turnover	€702,175
Operating Expenses	€229,095
No. Of Full-Time Employees	5.67
No. Of Part-Time Employees	10

None of the respondents clustered with local businesses to enhance their marketing strategy. However, one marina offered information on all local businesses to visitors upon arrival. At this marina and one other, the local supermarket would deliver goods to the visitors’ boats for free.

4. Conclusion

In conclusion, this paper presented the results of a survey of visiting boat owners to Irish marinas. It also gave a snap shot of Irish marina activity based on the completion of a marina operator survey by six marinas in Ireland. Overall, it was found that most marina visitors travel using a privately owned sailing yacht, with on average 3.06 adults and 0.17 children per boat, spending an average of 19 nights in Ireland and 4.66 nights in each marina visited. Having analysed each respondents expenditure, it was noted that the average spend per boat was €1884; the average spend per person excluding children was €550.49 and the average spend per person including children was €521.24. The Marine Operator survey found that on average the sample of marinas had 229.17 berths, can accommodate a maximum boat size of 103.75 feet, with 468.33 visiting boats per annum, typically staying for 3 nights. It was also determined that the average overnight charge for a 38 foot boat was €32.92 Th sample of marinas had an average total turnover of €702,174.50 and employed 5.67 full time employees and 10 part time employees.

Firstly, the most obvious advantage of developing a strong marine industry is that it would generate much revenue for both local economies and the national economy. In turn, the generation of this revenue would assist the creation of jobs. The marina industry consists of a broad range of services requiring many different skills, which include boat repair, boat sales, chandlery, insurance, and many more.

Having visited marinas, it was found that it can often be the case that local residents oppose the construction of new marinas. It was noted that local residents tend to feel they are losing part of their coastline to the development of marinas, which may cause the area to be less aesthetically appealing. Therefore, it is important to make local residents aware of the benefits of marinas to ensure local support, e.g. what the marina can bring to their local economy. Other disadvantages facing the development of Irish marina development, as identified in a study by Annett et al. (2007), include weather, facilities, cost and distance between safe moorings. Failte Ireland (2012) point out that one major issue facing marinas and more generally the Irish marine leisure and tourism industry is the fact that the sector has faced five changes in ministerial and departmental responsibility over the last fourteen years. These changes have weakened the industry, as no single department or minister has remained in power long enough to follow through on proposals. In addition to this, proposals that are put forward are coming from different ministers/departments and so there is no consistent approach with regard to the sector.

While a cautious view has to be taken of the results presented here due to the limited sample size the results of the survey do point to the fact that visiting leisure boats make a significant contribution to local economies and well run marinas have the potential to increase that contribution by making Ireland a more attractive destination for visiting boat owners. A well run circuit of marinas around the Irish coast might also encourage more charter boat services here. Currently only 10 charter sail boats operate out of Ireland compared to over 200 in Scotland (Kean, 2014). Of course overly bueratrastic Irish Passenger boat regulations also need to be reformed if such charter businesses are to increase. Further research is required to get a clearer picture of the economic impact of marinas in Ireland. It is suggested that the research should be carried out over a longer period of time with a larger research team. This would allow for more time to gather data, and by having a larger research team it would be possible to make more marina visits to carry out surveys.

There is significant potential to develop the marine tourism and leisure in Ireland. In order to develop this sector, Conlon (2011) outlined a number of steps that need to be followed that are very relevant to the marina sector in particular; (i) collaborative marketing – getting all marinas to market their product together, (ii) commercial development – providing training and business clusters to help develop the industry, (iii) identifying development opportunities – develop marina plans and continue research to encourage development, and (iv) marina festivals and events – organise festivals and events to attract visitors and generate economic gains. The Integrated Marine Plan for Ireland – Harvesting our Ocean Wealth (2011) also recognise that Ireland has the expertise, assets, infrastructure and some of the most pristine waters in Europe to create the ideal product for marine leisure and tourism. By sustainably exploiting the full potential of each of these characteristics, it is very possible for Ireland to become a top destination for boat owners and more broadly to significantly increase the size of the marine leisure industry.

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