A Profile of Boating Activity on the Irish Sea

MARINE INSTITUTE
FORAS NA MARA

Marine Institute
80 Harcourt Street
Dublin 2
ph: 353-1-4780333
fax: 353-1-4784988
Web: www.marine.ie

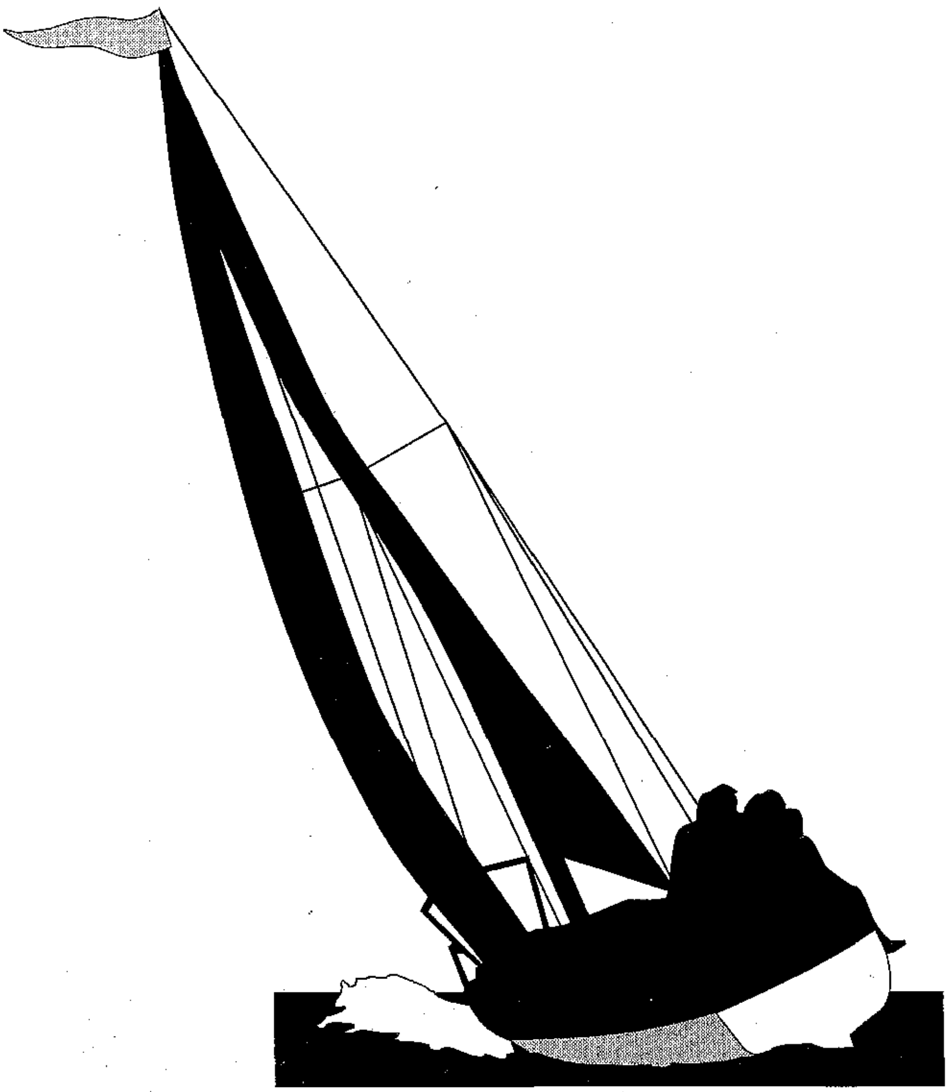
ACKNOWLEDGEMENTS

The Marine Institute would like to acknowledge the following persons for their assistance and support with the preparation of this study.

Maura Carey and Margaret Williams, INTERREG Office North Wales, for co-ordinating the survey work in North Wales and Rosemary Davies, INTERREG Office West Wales, for co-ordinating the survey work in West Wales.

The various yacht clubs and marinas on the east coast of Ireland and the west coast of Wales whose kind cooperation facilitated the completion of the survey questionnaires.

Brian Deane for his careful analysis of the survey data.



CONTENTS

EXECUTIVE SUMMARY AND CONCLUSIONS

This report is based on the results of a survey undertaken to profile the extent and nature of boating tourism on the Irish Sea between the East Coast of Ireland and the West Coast of Wales. From the data collected it is possible to draw conclusions about the type of action that will help to promote the future boating tourism potential of the Irish Sea.

Important characteristics that relate to the extent and nature of boating activity in the region include:

- Almost 60% of boat owners included in the survey made more than three trips involving overnight stays away from their home port in 1996.
- Almost 50% of all trips involved stays of between 1-3 nights, and 20% involved stays of 3-5 nights.
- Ninety percent of all boats reported that they sail with two or more crew members on board.
- The average spend per person on board was relatively high with over 40% of respondents reporting a spend of £20-30 per person per day.
- Seventy three percent of boat owners indicated that they had at some point completed a cruise to Ireland or Wales.
- Seventy five percent of boat owners reported a preference for marina berthing over all other types of available berthing.
- Word of mouth is the most common means by which boat owners gather information about cruising grounds based in the Irish Sea area.

The survey confirms that the Irish Sea is already established as a popular cruising ground for Welsh and Irish boat owners and indicates that the potential exists to expand the sector further. Factors which support this view include:

- The close proximity of the two coastlines makes the cruising ground accessible to a large number of cruising boats, big and small.
- Irish Sea cruising grounds are attractive to visiting cruising boats – 97% of visiting boats included in the survey indicated that they would like to return to the area again.
- There is scope to attract boats from other UK locations. There are between 170,000 and 180,000 boats in the UK in total – approximately 9,500 of these are based in Scotland, 12,600 in North West England and 4,500 in Northern Ireland.
- Marina and other boating facilities are either over crowded or in short supply on the south coast of England, the north coast of France and in other popular European destinations. Because there is limited freedom to expand supply to meet increasing demand in these areas the opportunity exist to attract business from these markets.

It hoped that by making this type information available interested parties will be better informed of the opportunities that exist for developing the Irish Sea as a cruising destination for visiting boats.

1. INTRODUCTION

Tourism is playing an important part in the economic development of the regional economies of Ireland and Wales and has been successful in generating income earning opportunities in areas where it has often been difficult to foster other forms of economic activity. There are strong indications that the potential exists to expand this sector further, in the process generating additional benefits to the respective economies in Ireland and Wales.

This report focuses specifically on boating tourism on the Irish Sea between the east coast of Ireland and the west coast of Wales. At present, boating tourism in this region, although very active, remains relatively underdeveloped compared to developments elsewhere in Europe.

A study prepared by economic consultants, Fitzpatrick Associates; "Nautical Tourism on the Atlantic Coasts of the European Community", noted that the east coast of Ireland was ideally suited to benefit from the expanding yacht sector in Wales. The converse is also true with Wales being ideally suited to benefit from visiting yachts from Ireland. This suitability of the regions for cruising, is largely a consequence of the proximity of the two coastlines, a factor which makes boating across the Irish Sea relatively short and safe for both the novice and experienced boat owner, and also for the smaller as well as the bigger cruising boat.

Moreover, the Irish Sea is located relatively close to the large boating markets on the south and west coast of England, the West coast of Scotland, Brittany and Northern Ireland. This gives the Irish Sea an added advantage over more remote and exposed destinations, such as the Scottish Highlands and Islands and the West coast of Ireland.

The west coast of Wales and the east coast of Ireland are regions with long standing maritime traditions and provide the boating tourist with an exceptional choice of coastal attractions. These include the outstanding natural beauty of the hinterland around the Snowdonia Mountains in Wales and the Wicklow Mountains in Ireland, the numerous coastal towns and villages with their particular Celtic charm, vibrant bars, inviting restaurants and welcoming people that are scattered along both coastlines, and the abundant heritage sites and places of scientific and archaeological interest that add depth to the tourism product.

Within the region covered by this report there are currently four marinas in Ireland and eight in Wales, providing berthing for some 690 and 1,820 boats respectively. It is evident however, that improvements in existing facilities will be required to cater for increasing demand.

In the summer of 1997 the Marine Institute initiated a survey with a view to collecting data on the nature of boating tourism on the East Coast of Ireland and the West Coast of Wales. This report sets out to present the data collected in the survey and to interpret it in order to draw conclusions that will provide direction as to the type of action that can best promote the development of this sector in the future.

2. METHODOLOGY

The survey was conducted by means of a questionnaire which was completed by personal interview at sailing clubs and marina locations on the east coast of Ireland and the west coast of Wales. A small number of questionnaires were circulated to marina locations and yacht clubs, and completed by the respective members and berth holders.

In total 134 questionnaires were completed of which 76 were returned from Welsh ports and 58 from Irish ports.

As the issues being considered relate to two separate regions, the report analyses responses on the basis of:

- those respondents based in Ireland (operating out of an Irish port)
- those respondents based in Wales (operating out of a Welsh port)
- all respondents combined

3. SURVEY FINDINGS

3.1 Ports Included in the Survey

Table one details the ports in Ireland and Wales from which survey questionnaires were returned. The survey incorporated a wide geographic spread of ports on both coasts in an attempt to monitor the opinion of boat owners based throughout the regions (see map on page 8)

Table 1: Home Port of Respondents

Irish Ports	%	Welsh	% Total
Clontarf	3.7	Port Dinorwic	3.7
Wicklow	6.0	Conwy	9.7
Dun Laoghaire	5.2	Pwllheli	9.0
Courtown	3.7	Holyhead	1.5
Malahide	6.0	Bangor	0.7
Howth	7.5	Caernarfon	1.5
Wexford	3.7	Aberdovey	3.0
Kilmore Quay	4.5	Neyland	7.5
		Aberystwyth	2.2
		Others	20.9
Total	**40.3**		**59.7**
			100%

3.2 Nature of Cruising Activity and Associated Expenditure

There is very little data available on the nature of cruising activity on the Irish Sea. This section attempts to draw a profile of this activity, focusing on the average number and duration of cruising trips made by the boats, the number of crew members, and the associated average expenditure.

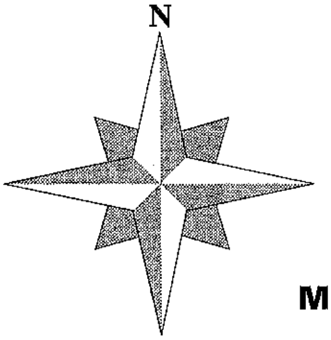
3.2.1 Number and Duration of Trips Incorporating Over Night Stops

Table 2 identifies the number of trips made by the boats included in the survey during 1996 that involved at least one overnight stop. It is assumed that cruising sailors make a similar number of trips annually.

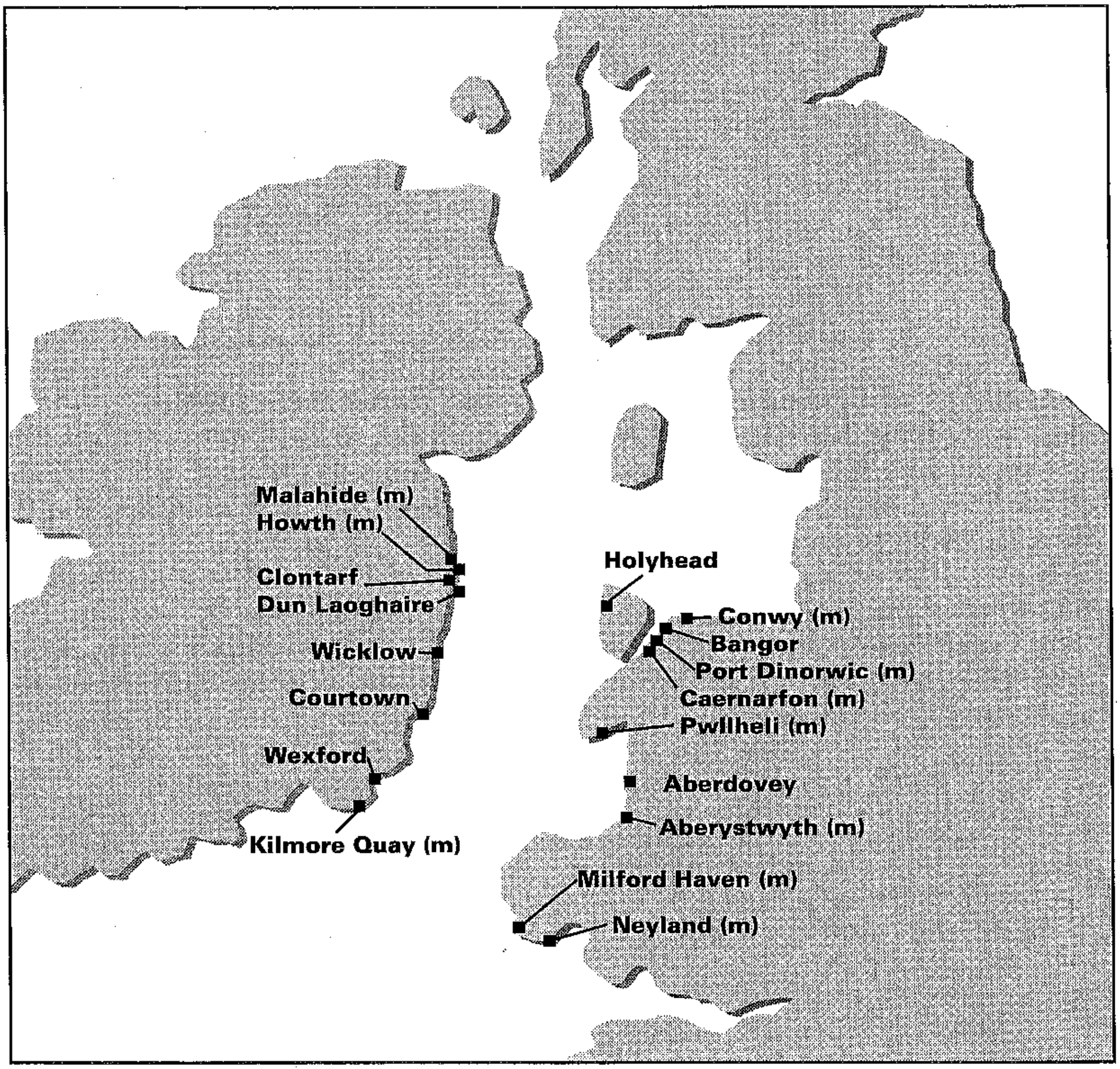
Table 2: Number of Trips Incorporating Overnight Stops (1996)

Trips per year	Based in Ireland	Based in Wales	Total
1 trip a year	20.0	16.1	17.7
1-3 trips a year	22.5	27.4	25.5
3-5 trips a year	42.5	19.4	28.4
5-10 trips a year	15.0	37.1	28.4
Total	**100.0**	**100.0**	**100.0**

A similar number of Irish and Welsh based boats, circa 58%, undertook three or more trips in 1996. A higher proportion of Welsh boats to Irish boats however, (37% and 15% respectively) made between five and ten trips in the same year.



Main Ports and Harbours Included in the Survey



*Marina ports are marked (m)

Table 3 reveals the duration of trips incorporating overnight stops.

Table 3: Duration of Overnight Trips

Duration	Based in Ireland	Based in Wales	Total
1 overnight	5.6	14.1	10.4
2-3 overnights	40.7	52.2	47.2
4-5 overnights	25.9	16.9	20.8
1 week	9.3	5.6	7.2
2 weeks	11.1	7.0	8.8
3 weeks	7.4	4.2	5.6
Total	**100.0**	**100.0**	**100.0**

The pattern of trip duration was not all that different between the two groups; both Irish and Welsh boat owners indicated that 2-3 overnight stops constituted the average duration of their cruises. This suggests that the majority of cruises are relatively short trips, probably made over long weekends.

The number and duration of trips made by the boats has a significant impact on the level of expenditure attributed to the cruising fleet – additional nights spent in port usually involve additional expenditure by the crew on shore based activities.

3.2.2 Number of Crew Members

Table 4 provides information on the number of crew members on board when sailing or racing away from the home port. The total number of crew covered by the survey was 387. In conjunction with the number and duration of overnight trips, the number of crew members on board during a cruise also impacts on the overall level of expenditure attributed to each boat – more crew members means more paying customers for the local bars, restaurants and other shore based attractions.

Table 4: Number of Crew per Boat

Crew	Based in Ireland	Based in Wales	Total
One	5.5	17.6	12.4
Two	20.0	47.2	35.6
Three	20.0	16.2	17.8
Four	29.1	12.2	19.4
Five	9.1	2.7	5.4
Six	14.5	2.7	7.8
Seven	1.8	0.0	0.8
Eight	0.0	1.4	0.8
Total	**100.0**	**100.0**	**100.0**

Irish boats included in the survey have a tendency to sail with more crew members than their Welsh counterparts. Whereas the most common crew size on Welsh boats was as low as two, the most common crew size on the Irish boats was four. To further reinforce this point, 25% of Irish boats reported sailing with more than four crew members in comparison to only 7% of Welsh boats

3.2.3. Average Expenditure Per Person Per Day

Table 5 details the average spend per person per day while on a cruise. It reveals that over 40% of boats from both Ireland and Wales included in the survey have an average daily expenditure per person per day of between £20 and £30.

Table 5: Daily Expenditure per Person

Daily Expenditure	Based in Ireland	Based in Wales	Total
Less than £10	7.7	11.3	9.8
£10-£20	7.7	23.9	17.1
£20-£30	44.2	42.3	43.1
£30-£40	23.1	7.0	13.8
£40-£50	5.8	9.9	8.1
More than £50	11.5	5.6	8.1
Total	**100.0**	**100.0**	**100.0**

A survey conducted during a cruise in company organised by the Irish Cruising Club in 1996 revealed a similar level of expenditure by Irish crews, circa £26 per day. The same report revealed that foreign yachtsmen spend on average three times this figure, circa £88 per day. This finding points to the importance of attracting more foreign boats and crews to Irish and Welsh shores.

A significantly higher percentage of Irish respondents in comparison to Welsh respondents indicated an average spend in the £30-£40 category (23% and 7% respectively).

3.3 Cruising Destinations.

3.3.1. Most Popular Cruising Grounds

Table 6 reveals the cruising grounds most frequently visited by boats included in the survey (in some cases respondents recorded a preference for more than one cruising ground). It indicates that boat owners are most active in cruising grounds close to their home port – 81 % of Irish based boats cruise regularly on the east coast of Ireland, 67 % of Welsh based boats cruise regularly on the north coast of Wales and 44 % on the west coast of Wales. Outside of this activity Irish boats indicated a preference for visiting Welsh cruising grounds, and Welsh boats a preference for visiting Irish cruising grounds.

The combined response indicated the east coast of Ireland to be the most popular cruising ground.

Table 6: Cruising Ground

Cruising Ground	Based in Ireland %	Based in Wales %	Combined %
North Wales	23	67	48
East Cost Ireland	81	29	52
Scotland	16	9	12
South West England	4	15	10
South England	2	4	3
West Wales	25	44	35
West Coast France	4	6	5
South Wales	4	15	10
South West Ireland	21	4	12
West Cost Ireland	4	6	5
Northern Ireland	12	6	9

3.3.2. Popular Harbours in Ireland and Wales

Table 7 reveals the most popular ports of call on the Irish sea.

Howth was the most visited destination in the survey; 66% of combined boat owners reported a visit to the harbour. It attracts the majority of visitor traffic with 47% of Welsh boats indicating a visit. Wicklow and Dun Laoghaire also prove popular with Welsh visitors; the number indicating a visit to each of the harbours being 41% and 33% respectively. Irish boat owners cruising at home favour Wicklow as a destination with 91% reporting a visit to the harbour. It is worth noting that Wicklow is a popular destination with Welsh and Irish boats despite not having a marina facility. The popularity of the harbour might partly be the result of its proximity to the large cruising fleet based in Dublin which makes the harbour a prime destination for boats on an over night cruise from Dublin. It is also a convenient stopover for yachts on a passage through the Irish Sea and for cross channel yachts. These factors also contribute to the popularity of Dun Laoghaire and Howth.

Given that the marina developments in Waterford and Kilmore Quay are quite recent, it is likely that more boats will report a visit to these harbours in the future.

Welsh boat owners cruising at home reported Port Dinworig as their preferred destination; 53% indicating a visit to the harbour. Irish respondents cruising in Wales indicated Pwllheli to be their favoured destination.

Table 7: Popular Harbours in Ireland and Wales

% of Respondents

Harbour	Based in Ireland		Based in Wales		Combined	
	Yes	No	Yes	No	Yes	No
Irish Ports						
Carlingford	67	33	20	80	41	59
Malahide	54	46	15	85	32	68
Howth	90	10	47	53	66	34
Dun Laoghaire	77	23	33	67	52	48
Wicklow	90	10	41	59	62	38
Arklow	77	23	28	72	49	51
Kilmore Quay	58	42	15	85	33	67
Waterford	46	54	23	77	33	67
Welsh Ports						
Port Dinorwic	26	74	53	47	42	58
Conwy	35	65	49	51	43	57
Caernarfon	30	70	48	52	40	60
Pwllheli	51	49	52	48	52	48
Aberystwyth	23	77	45	55	36	64
Fishguard	21	79	36	64	30	70
Swansea	7	93	24	76	17	83
Milford Haven	23	77	48	52	37	63

3.3.3. Factors Discouraging Visits to Harbours in Ireland and Wales

The survey attempted to investigate the factors which discouraged visits to particular harbours. A profile of the responses is given in table 8.

Table 8: Reasons for Not Visiting Ports

Reasons	Based in Ireland	Based in Wales	in Total
Time limitations	10.5	13.3	12.1
Lack of facilities	7.0	5.3	6.1
Natural limitations	7.0	8.0	7.6
No specific Reason	54.4	53.4	53.7
Other	21.1	20.0	20.5
Total	**100.0**	**100.0**	**100.0**

It is very difficult to draw any firm conclusions from the analysis. More than half of those based in both Irish and Welsh ports gave 'no specific reason' as their response for not having visited the ports identified in the survey. This may well suggest that there is an absence of information about certain ports and in the absence of knowledge or certainty individuals are inhibited from moving away from familiar cruising areas.

3.3.4 Questions Asked Exclusively to Visiting boats

With the objective of ascertaining the opinion of visiting boat owners a number of questions were asked exclusively to respondents who were on a cruise at the time of the survey; hence they were visitors to the port where the survey was being conducted.

Table 9 identifies the means by which the visiting boat owners heard about their present port of call.

Table 9: Means of Hearing About Port of Call

Source	% of Respondents
Newspapers/Magazines	6
Cruising Guides	15
Tourist Brochure	9
Word of Mouth	48
Other	21

The vast majority of boat owners (48%) indicated word of mouth as being the means by which they heard of their present port of call. This is not surprising since individuals usually seek the views of a friend or acquaintance before committing themselves to travelling. The pattern indicated above is similar to tourism in general and underpins the importance of referral business to the industry.

The visitors were asked to identify the factors that attracted them to an area. The reasons given were quite diverse, but the convenience of the location and the facilities provided were indicated as being particularly important (see table 10).

Table 10: Attractions

Attractions	% of Respondents
Culture	13
Convenient location	23
Facilities	23
Aesthetic Value	19
Other	23

It is clear that the yachting product is not just a question of facilities and location. Visitors to Ireland and Wales enjoy good restaurants and bars, and are attracted generally by the Celtic Culture, hospitality of the people, and the general ambiance of traditional Welsh and Irish towns and villages. This has been backed up by anecdotal information collected at the time of the survey.

When questioned on the intended duration of their visit two thirds of the visitors reported staying no more than two nights in any given harbour. This is indicative of the transient nature of boating tourists and their desire to explore multiple destinations when cruising away from home.

Fifty percent indicated that the current cruise was their main holiday. The other cruises were mainly short breaks taken over long weekends and usually supplemented a longer cruise taken as a main holiday at another stage during the summer.

One of the most positive findings of the survey was that 97% of respondents indicated that they would return to the area they were visiting. This response is indicative of the high quality boating product which exists in both Ireland and Wales and shows that the foundation exists upon which a successful boating tourism product can be built.

3.4 Berthing Facilities

The provision of safe, convenient and reliable berthing and mooring facilities is critical to attracting boating tourists to a region. With a view to this, the survey asked boat owners to report on the preferred means of securing their boats while cruising away from their home port (see table 11).

Table 11: Preferred means of securing boats

Securing	Based in Ireland	Based in Wales	Total
Anchoring	3.5	2.7	3.1
Marinas	82.4	68.6	74.6
Moorings	8.8	8.2	8.5
Pontoons	5.3	20.5	13.8
Total	**100.0**	**100.0**	**100.0**

Clearly, marinas are the preferred means of securing boats for the majority of respondents. Pontoon berthing proved more popular with the Welsh boat owners, a finding which might be attributable to the higher incidence of pontoon berthing which exists in Wales and therefore the familiarity of this type of berthing to Welsh boat owners.

3.5 Popularity of Cruising Between Ireland and Wales

3.5.1 Respondents Who Have Crossed the Irish Sea

In order to establish the popularity of cruising between Ireland and Wales the survey asked boat owners to report on whether or not they had completed a channel crossing between the two destinations. Table 12 below records the findings.

Table 12 Respondents who have sailed to Ireland or Wales

Crossed	Based in Ireland %	Based in Wales %	in Total %
Yes	72.4	66.2	69.0
No	27.6	33.8	31.0
Total	**100.0**	**100.0**	**100.0**

A high proportion of boat owners (69%) reported that they had completed the voyage, a finding which underpins the popularity of the Irish sea as a cruising ground. The Irish and Welsh response was broadly similar. Not surprisingly there is a strong relationship between boat length and an undertaking of the voyage – 44 % of those with boats of less than 7.5 metres had made the journey, 71 % of those with boats between 7.5 and 10.0 metres, and 78 % of those with boats greater than 10.0 metres.

3.5.2 Frequency of Irish Sea Crossings

For those who answered **yes** above, Table 13 identifies, how many times the voyage has been undertaken.

Table 13: Number of Times the Irish Seas has been Crossed

Times	Based in Ireland	Based in Wales	Total
50 times +	2.5	11.9	7.3
20-49 times	20.0	11.9	15.9
10-19 times	17.5	11.9	14.6
5-9times	25.0	14.3	19.5
1-4 times	35.0	50.0	42.7
Total	**100.0**	**100.0**	**100.0**

Forty two per cent of combined respondents have made the trip between one and four times and a significant proportion of respondents (22% of Irish based boats and 23% of Welsh based boats) have made the crossing as many as twenty times or more. The high incidence of repeat crossings further underpins the popularity of cruising on the Irish Sea.

3.6 Promoting Cruising on the Irish Sea

The survey attempted to identify initiatives which might encourage an increase in the number of boats cruising between Ireland and Wales. The incentives discussed in the survey included, the development of maritime events and functions, and the introduction of discounts for particular shore side activities, i.e. local transport, and visits to places of local interest. Table 14 provides details of the responses.

Table 14: Factors Encouraging Irish Sea Crossings

Factors	Based in Ireland	Based in Wales	Combined
Events/functions	53.6	38.7	45.0
Discounts	41.1	26.7	32.8
Other	83.3	40.0	61.2

Irish boat owners were more receptive to both events/functions and discounts; the responses in support of the initiatives were 53% and 41% respectively, in contrast to the more moderate level of support from the Welsh boat owners, 38% and 26% respectively.

Thirty nine percent of combined respondents who reported 'other' factors indicated that the extension of berthing facilities and marinas in particular would encourage them to make more crossings between Ireland and Wales.

With a view to developing an event aimed at encouraging further cruising activity between Ireland and Wales the boat owners were asked to report on their interest in participating in an organised 'cruise in company' between the destinations. Table 15 identifies the level of interest.

Table 15: Interest in Cruising in Company

	Based in Ireland	**Based in Wales**	**Combined**
Yes	76.8	79.2	78.0
No	23.2	20.8	22.0
Total	**100.0**	**100.0**	**100.0**

A very high proportion of respondents, almost 80% from both Wales and Ireland, said they would be interested in participating in a cruise in company. Cruising in company is very popular with sailors and many yacht clubs in Ireland and Wales already organise annual cruises in company.

The 78 per cent who said they would like to cruise in company were asked whether they would be primarily interested in: a single destination cruise, a multiple destination cruise or both (see table 16).

Table 16: Interest in Single or Multiple Destinations

Destination	**Based in Ireland**	**Based in Wales**	**Combined**
Single	4.7	8.5	6.9
Multiple	72.1	28.8	47.1
Both	23.3	62.7	46.1
Total	**100.0**	**100.0**	**100.0**

It is clear from the table that the Irish respondents favoured multiple destination cruises while the Welsh were less specific and indicated an interest in either single or multiple.

To complete a comprehensive profile of the type of cruise that would satisfy the demands of boat owners in Ireland and Wales the respondents were asked to comment on the optimum duration for such a cruise. Table 17 below sets out the responses.

Table 17: Optimum Cruise Duration

Duration	Based in Ireland	Based in Wales	Combined
3 days-1 week	48.8	52.5	51.0
1-2 weeks	46.5	40.7	43.1
More than 2 weeks	4.7	6.8	5.9
Total	**100.0**	**100.0**	**100.0**

The responses of those based in Ireland and Wales were broadly similar with 50% of respondents indicating 3 days to a week as the optimum duration. A higher proportion of Irish respondents favoured a longer cruise of one or two weeks duration. There was very little support for cruises in excess of this duration.

Effective promotional activities are central to the successful development of future boating events, and with this in mind the survey investigated the means by which boat owners gather information about boating events (see table 18).

Table18: Source of Information About Events

Awareness	Based in Ireland	Based in Wales	Combined
Club notices	61.4	62.7	62.1
Boating Press	48.2	44.0	45.8
Newspapers	7.1	8.0	7.6
Magazines	10.7	32.0	22.9
Other	43.1	17.3	28.6

From the table it is clear that the majority of Irish and Welsh boat owners, circa 61% and 63% respectively, gather information about events from notices placed in clubs. The boating press also prove an important source of information. Forty three per cent of Irish respondents indicated 'other' means of gathering information; the majority of these responses refer to 'word of mouth'.

3.7 Information Requirements

The provision of accurate and up to date information plays an important role in attracting boating tourists to a particular cruising ground. By identifying accurately the type of information boat owners require and then making it readily available and accessible it is possible to facilitate easier access to the coast, and possibly increase the level of cruising traffic.

3.7.1 Information Requirements in Advance

The survey identified five categories of information and asked respondents to rank each category as being either essential, important, or useful to them when planning a cruise away from their port. The findings are as follows:

- **Availability of moorings, marina berths, pontoons, and safe anchorage's**

	Based in Ireland	Based in Wales	Combined
Essential	67.2	62.2	64.4
Important	24.1	28.4	26.5
Useful	8.6	9.5	9.1

Two out of three respondents considered that information on the availability of moorings and safe anchorage as essential, while one in four thought it important. The readily available and accessible provision of this information is central to attracting boats to a destination.

- **Electricity hook-up, water supply, showers, lifting facilities, fuel, etc**

	Based in Ireland	Based in Wales	Combined
Essential	15.5	17.3	16.5
Important	41.4	36.0	38.3
Useful	43.1	46.7	45.1

A little over half of all respondents considered access to facilities such as electricity and water as either essential or important

- **Accommodation**

	Based in Ireland	Based in Wales	Combined
Essential	3.5	1.3	2.3
Important	3.5	1.3	2.3
Useful	93.1	97.3	95.5

It is clear that information about accommodation availability was not a major issue of concern to the majority of boating visitors.

- **Restaurants and other shore-side events and attractions**

	Based in Ireland	Based in Wales	Combined
Essential	19.0	20.0	19.5
Important	39.7	34.7	36.8
Useful	41.4	45.3	43.6

The availability of restaurants, shore-side events and attractions was either essential or important to over half of all respondents.

- **Accessibility, i.e. navigation information**

	Based in Ireland	Based in Wales	Combined
Essential	82.8	70.3	75.8
Important	13.8	23.0	18.9
Useful	3.5	6.8	5.3

Navigation information was reported as being essential by the majority of respondents in both Ireland and Wales.

3.7.2. Communication of Information to Boat Owners

Once the promotional information has been produced, the task remains to establish the most effective method of disseminating it to boat owners. The survey asked respondents to indicate their preferred means of gathering information. Table 19 sets out the response.

Table 19: Preferred Means of Securing Information

Information Source	Based in Ireland	Based in Wales	Combined
Brochure from Tourist Information Office (TIO)	19.3	18.7	18.9
Brochure from Club	59.6	37.3	47.0
Internet	24.6	17.3	20.5
Phone Club	19.3	48.6	35.9

The combined response indicates that a brochure made available in the yacht clubs is the preferred method for boat owners to gather the information they require. Yacht clubs provide the focus for general boating activity, and four out of five respondents to the survey reported that they were members of a club. Breaking the figures down, however, it becomes clear that the Welsh respondents reported a preference for telephoning the clubs. From the point of view of promoting cruising in the Irish Sea the survey highlighted that the preparation and distribution of a brochure to clubs will probably achieve the most success. It is interesting to note that the Internet, although a relatively new source of information, was already favoured by one in five respondents.

APPENDIX

Vessel Characteristics

This appendix contains additional information relating to the characteristics of vessels on the Irish Sea. It reports on the number of sailing boats and motor boats in the survey, the average draft and length of the boats and the most common keel types.

- **Percentage of Motor Boats and Sail Boats Included in the Survey**

Table 1 reports on the percentage of motor boats and sail boats included in the survey.

Table 1: The Percentage of Motor Boats and Sail Boats

	Based in Ireland %	Based in Wales %	Total %
Motor	5.2	19.7	13.4
Sail	94.8	80.3	86.6
Total	**100.0**	**100.0**	**100.0**

The table shows that the vast majority of boats included in the survey were sailing boats. For reasons of safety it is important that boats have recourse to an alternative means of propulsion and most of the sailing boats included in the survey are fitted with auxiliary engines. For this reason it is useful for boats visiting Ireland and Wales to have convenient access to fuel supplies.

- **Length of Boats**

Table 2 explores the length of the boats included in the survey. The data provided relates to the 'length overall' (LOA) of the boats. It is normally the case that larger craft are more capable of making longer sea passages. This is evident from the survey which identified a relationship between the length of boat and the completion of a voyage across the Irish Sea – while 44% of those boats of less than 7.5 metres had made the journey, 71% of boats between 7.5 metres and 10 metres in length had made the same journey.

Table 2: Boat Length (LOA)

Length	Based in Ireland %	Based in Wales %	Total %
Length under 7.5 metres	15.5	15.8	15.7
Length between 7.5 and 10 metres	62.1	55.3	58.2
Length greater than 10 metres	22.4	28.9	26.1
Total	**100.0**	**100.0**	**100.0**

The smallest boat included in the survey was 5.5 metres and the longest was 14 metres. Nearly six out of ten boats fall into the 7.5 to 10 metre category and one in every four was greater than 10 metres. The overall average was 8.9 metres. Since boats of 7 metres and upwards in length are generally of a suitable size to make short offshore voyages the majority of boats included in the survey could comfortably make the trip between Ireland and Wales.

- **Draft**

In order to assess the average depth requirements of the boats, the survey asked respondents to report on the draft of their boats.

The deepest draft reported was 2.13 metres and the average draft of all boats is 1.13 metres. Generally boats based in Ireland had a somewhat greater draft with one in four being over one metre. Only a very small proportion of boats operating out of both Welsh and Irish ports had a draft over 2 metres (see table 3).

Table 3: Boat Draft

Draft	Based in Ireland %	Based in Wales %	Total %
Draft under 1 metre	19.0	41.3	31.6
Draft between 1 and 2 metres	77.5	53.4	63.9
Draft greater than 2 metres	3.5	5.3	4.5
Total	**100.0**	**100.0**	**100.0**

- **Keel Type**

Table 4 reports on the keel types included in the survey.

Table 4: Keel Type

Keel	Based in Ireland %	Based in Wales %	Total %
Fin	47.4	24.3	34.6
Bilge	17.5	28.5	23.7
Lifting keel	14.0	4.3	8.7
Long	3.5	18.6	11.8
Catamaran	1.8	5.7	3.9
Winged	3.5	0.0	1.6
Others	12.3	18.6	15.7
Total	**100.0**	**100.0**	**100.0**

From studying the table it is apparent that there are significant variations in the type of keels fitted to boats in Ireland and Wales. In Ireland the most common keel type found was the fin keel (47%); the next most popular being the bilge keel (17%). In Wales the bilge keel was most popular (28%) followed by the fin keel (24%). The difference between these keel types being that fin keels are more suited to performance boats and bilge keels are more suited to cruising boats. Following from this, it is probably the case that the survey sample in Wales included more cruising boats than the Irish sample.