

Options for Marine Leisure Development in Waterford Estuary

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The MAYA project is executed within the scope of the Interreg II C programme in the NWMA region, with the support of the European Union.



Note: The Marine Institute commissioned consultants Brady Shipman Martin, Fitzpatrick's Associates and Kirk McClure Morton to prepare this report. Responsibility for information presented and views expressed rest solely with the authors and do not necessarily represent those of the Marine Institute

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1. Executive Summary

During 2000-2001 the Marine Institute, the national agency charged with responsibility for co-ordinating marine research in Ireland, participated in an Interreg IIc Project - MAYA - Marinas and Yachting in the North West Metropolitan Area. A key objective of this European project was to develop a spatial vision for marina developments in a city, estuary and sensitive coastal environments. As part of this project, the Institute commissioned a study of Waterford Estuary, which would:

- * assess the socio-economic impact of Waterford city marina;
- * develop a strategy for increasing marine leisure activity within the estuary;
- * propose guidelines for planning new marina developments.

The context area for the study extends from Hook Head west of Dunmore East and includes Waterford Harbour up to Waterford City and as far inland as Carrick-on-Suir and New Ross. The main towns/villages in the study area are: Dunmore East, Passage East, Duncannon, Arthurstown, Ballyhack, Cheekpoint, Waterford City, Carrick-on-Suir and New Ross.

The study was prepared, on behalf of the Marine Institute, by Brady Shipman Martin, Planning Consultants; Fitzpatrick Associates, Economic Consultants; and Kirk McClure Morton, Maritime Engineering Specialists. This report presents the results of the socio-economic assessment of the impact of Waterford City marina and provides a spatial plan for increasing marine leisure activity in Waterford Estuary. The Marine Institute has published '*Guidelines for Planning a Marina Development*', (2001) as a separate document.

Project Partners:

The active co-operation of the key agencies in Waterford/Wexford was fundamental to achieving the objectives of the study. A steering committee was established at the commencement of the project and included the following:

Tom Mackey, City Engineer, Waterford Corporation

Mr. John Clancy, C.E.O. Port of Waterford

Captain Philip Cowman, Harbour Master, Port of Waterford

Mr. Martin McDonald, Director of Development, Wexford County Council

Mr. Jim O'Donovan, Director of Development, Waterford County Council

Mr. Joe Palmer, Regional Tourism Manager, South East Regional Tourism Authority

Ms. Monica Leech, Waterford Tourism and Chamber of Commerce.

The members of this steering committee liaised with the Marine Institute and the consultants, and contributed valuable information for the compilation of this report.

A summarised profile of water-based activities and tourism in Waterford Estuary:

Waterford marina is the main sailing facility found in the Estuary. The marina attracted over 180 visiting boats during 2000. Dunmore East, which has no formal sailing facility, attracted more than 300 visiting yachts during the same period. Visiting cruise liners is a growing tourism activity in this area. In 1999 some 14 cruise ships visited Waterford port, carrying about 5,000 passengers. A wide range of marine leisure activities is undertaken throughout the estuary and includes: sea angling from the boat and from the shore; windsurfing; sailing; canoeing; board sailing; dinghy sailing; diving; whale/dolphin watching; cruising and boating in rowboats and motorboats; jet skiing; bird watching; visiting nature reserves and trips to the beach/seaside.

The South East region is a popular destination for overseas tourists. It is estimated that 315,000 overseas tourists visited County Waterford in 1999, generating £30m in revenue. In the recent past there has been a resurgence in the domestic tourism market, with much of the recovery attributable to high-spend domestic short breaks.

Socio-economic impact of Waterford Marina - Key Findings:

- * £240,000 is generated by berth holders per annum - equivalent to £2,900 per boat. Half of this spend is boat related.

- * 185 boats visited Waterford City Marina in 2000 with an average length of stay of 3 days.
- * Visiting boats generated £4,600 in marina fees.
- * Total visitor income is estimated at £56,000 per annum.
- * Cruise ships visiting Waterford generated an additional £580,000 per annum.
- * It is estimated that the marina sustains 11 full-time job equivalents.
- * Leisure related businesses on the Waterford Quays estimate that the marina generates between 2-5% of their total turnover.

The potential for increased leisure boating activity in Waterford Estuary - Key findings:

- * While there is a wealth of marine related activities currently operating in the estuary, the lack of berthing facilities is hampering further development of marine leisure activities.
- * The estuary would be an ideal location for the development of a "mini cruising ground" if provided with a range of infrastructure facilities. This cruising area, located between Kilmore Quay and Crosshaven, offers sheltered waters, with access to a city location.
- * The development of a mini cruising ground would act as a stimulus to increase marine leisure activity locally, where clusters of activities are recommended.
- * Any proposed facilities should be adaptable to accommodate the infrastructural needs of a wide range of marine leisure users such as fishing, day boating, canoeing, diving and launch slipways. Facilities should be available to all comers interested in participating in marine leisure (subject to the requirements of public safety).
- * Three key locations are recommended for marina development:
- * **Dunmore East** - where it is recommended that marina development takes place in conjunction with proposed harbour improvements.
- * **Waterford City** - where the current marina on the South Quays is operating at capacity. The North Quays offer a suitable location for marina development. Outline plans, proposing a marina in conjunction with a hotel complex, are being prepared as part of the redevelopment of the Port of Waterford.
- * **New Ross** - a marina development at this location would give sailors the opportunity to cruise up river and enable access from the River Barrow.
- * In addition to the above, improved/enhanced facilities are recommended for Ballyhack, Carrick-on-Suir, Duncannon, Arthurstown and Cheekpoint, taking into account the existence of environmental designations in these areas.

This spatial plan provides a strategy to promote increased leisure boating activity which may be incorporated into: the regional tourism plan for the south east tourism region; relevant local development plans for both counties Wexford and Waterford; plans for the rejuvenation of Waterford Port. The plan highlights development options and seeks to stimulate growth of water-based tourism and leisure in Waterford Estuary. It is recommended that potential developers should read '*Guidelines for Planning a Marina Development*' (Marine Institute, 2001) before embarking on any marine leisure development.

2. SAILING IN IRELAND A CONTEXT

- 2.1 There are 5 European countries participating in the MAYA Project - France, Great Britain, Holland, Belgium and Ireland. The level of sailing activity and facilities provided vary greatly between the different countries (see Table 2.1).
- 2.2 There is little information available regarding sailing in Ireland in terms of participation, fleet numbers and boat size. In a study¹ undertaken by the ERSI, in 1997 on behalf of the Marine Institute, it was estimated that some 144,000 persons participated in boating or sailing over the period 1995/96. Approximately 82,000 used row boats or motor boats, 50,000 were involved in sailing while 30,000 engaged in boating or cruising on inland waterways.
- 2.3 In terms of revenue it was estimated that the total national expenditure on equipment and supplies, day trips and overnight trips amounted to £43.8m. Of this £18.7m was spent on equipment, £12m on day trips and £13m on overnight trips. In terms of employment generated it was estimated that all types of boating gave rise to approximately 1,589 jobs.
- 2.4 The 'National Survey of Water-based Leisure Activities' (Marine Institute, 1998) also established levels of satisfaction amongst those who participated in the various activities. In terms of boating, 89% of those who participated in the survey indicated that they

were satisfied or very satisfied with the facilities available. Approximately 28,000 people indicated that they would have participated more in sailing if facilities were better while 82,000 indicated that they would start boating if facilities improved.

- 2.5 There is currently no registration system for leisure boats in Ireland and therefore their number can only be estimated. The number of leisure boats in Ireland is put at between 10-15,000. There are also no national figures on the breakdown between motorboats and sailing boats. In the case of Waterford City Marina motorboats are the dominant type with 5 times as many motorboats as sailing boats.
- 2.6 There is also no national data on the size distribution of the boats. However, figures do exist for Waterford City Marina and show that the majority of boats are between 16ft and 25ft.

Table 2.1 : Boating activity in other European Countries

	France	Great Britain	Holland	Belgium	Ireland
No. of boats	725,000	1.5 million	500,000	15,000 (estimated)	10-15,000 (estimated)
Marinas	261	150	600	8	24 (estimated)
No. of berths	150,000	250,000 (incl. Moorings / inland waterways /rivers)	250,000	4000	1600
Population	60 million	60 million	16 million	10 million	3.7 million

Source: ACT Ouest with TERP Advies: MAYA Project General Study, Interim Report, August 2000

¹ Marine Institute, 1997; A National Survey of Water-based Leisure Activities. Prepared by the Economic and Social Research Institute

Development of marinas in Ireland

2.7 As the definition of marina varies throughout Europe, for the purpose of this study a general definition of a marina has been derived. The definition of a marina used in the MAYA study is 'any managed equipment with services designed to welcome and shelter leisure boats'².

2.8 The development of marinas in Ireland began in the late 1980's and the country now offers in excess of 50 coastal and inland marinas estimated, 24 of which are located in coastal areas in the Republic of Ireland, along with 39 mooring sites and 9 pontoons.

2.9 In 1992 the Marine Institute proposed a National Network of Visitor Moorings. This was the first attempt to implement a co-ordinated plan at national level for the improvement of Irish sailing facilities. The purpose of the project is to:

- * establish a network of visitor moorings around the coast to complement marina facilities;
- * ensure that a long passage will not have to be undertaken along the coast without the availability of a safe mooring;
- * provide an opportunity for north-south cooperation in an area of common interest;
- * support the further development of Ireland as an international sailing destination.

2.10 The network was officially launched in the Autumn of 1998. Over 200 individual moorings at 39 locations in counties Waterford, Cork, Kerry, Clare, Galway, Mayo and Donegal have been provided as a result of the programme.

2.11 Sailing has always been a popular leisure activity in Ireland and with increased levels of disposable income combined with increased leisure time it would appear that interest in sailing is likely to increase. Such an increase in participation will result in increased demand for marine facilities throughout the country to cater for both national and visiting boats.

Table 2.2 : Size of boats berthed at Waterford City Marina

Size of Boat	Number of boats
Between 10-15 ft	3
Between 16-20 ft	21
Between 21-25 ft	22
Between 26-30 ft	10
Between 31-35 ft	14
Between 36-40ft	4
Between 41-45 ft	4
Between 46-50ft	2

Source: Waterford Corporation

² ACT Ouest with TERP Advises; MAYA Project General Study Interim Report, August 2000, page 8

3. CONTEXT FOR MARINA DEVELOPMENT IN THE WATERFORD ESTUARY

- 3.1 For the purpose of identifying a strategy for the Waterford Estuary the core study area extends from Hook Head west to Dunmore East and includes Waterford Harbour up to Waterford City and the tidal range of the rivers up to Carrick-on-Suir and New Ross. The main towns in the study area are: Dunmore East, Passage East, Duncannon, Arthurstown, Ballyhack, Cheekpoint, Waterford City, Carrick-on-Suir and New Ross (See Map 1 - Study Area).
- 3.2 The development of additional facilities for marine activity in the Waterford Estuary cannot be examined in isolation from the surrounding area which has a strong maritime tradition and a range of existing facilities. A context area for the study has also been identified which extends from Wexford City in the east to Helvic in the West and north as far as Carrick-on-Suir and New Ross.
- 3.3 The purpose of this section is to examine the study area in terms of its socio-economic profile, tourist facilities as well as the existing and proposed provision of marine activity in the area.

Socio-economic profile³

- 3.4 In 1996, an estimated population of nearly 300,000 lived within 40 miles of Waterford Estuary, with over 110,000 living within a 20 mile radius. Population growth within 40 miles was 2.7% since 1991, while population growth within 20 miles was slightly higher at 3.6%. The national average for population growth in the period was 2.8%.
- 3.5 The study area is surrounded by a number of sizeable urban centres. Situated within 20 miles are Waterford City (pop. 44,155), Tramore (pop.

6,536), New Ross (pop. 6,147) and Carrick-on-Suir (pop. 5,217). Kilkenny City (pop. 18,696) and Dungarvan (pop. 7,175) are within 30 miles. While Clonmel (pop. 16,182), Wexford (pop. 15,862) and Enniscorthy (pop. 7,640) are within 40 miles.

- 3.6 Gross Value Added (GVA) per capita in the South-East economy lags the national average, and ranks behind Dublin, the South-West and the Mid-West⁴. However, output in the South-East is higher than output in the Mid-East, Border, Midlands and West region. Within the South-East region, GVA per capita for Waterford is quite high. The lowest output in the South-East is recorded in Wexford, followed by Kilkenny.
- 3.7 Average incomes in the South-East are on the increase. Between 1991 and 1997, average total income per capita for the region rose by 43% to £9,300. This rate of growth was slightly lower than for the other seven regions, where growth ranged from 46% to 60%. Average total income in the South-East lagged all other regions except the Midlands in 1997, and was equivalent to 87% of the national average.
- 3.8 Within the South-East, the highest average total income per capita was recorded in Waterford (£10,300, i.e. close to the national average). For all other counties, average total income ranged from about £8,800 to £9,100 (between 83%-86% of the national average).
- 3.9 A similar pattern emerges when looking at average levels of disposable income. Average disposable income per capita for the South-East rose by 44%, to £7,600, from 1991 to 1997. Other regions grew by between 45% and 56% in the period. Relative to the national average, the South-East again ranked below all other regions except the Midlands, and was equivalent to 89% of the national figure.

³ See also Appendix 1.

⁴ Gross Value Added is a measure of the value of goods and services produced in a region which the producers receive minus any taxes payable and plus any subsidies receivable as a consequence of their production or sale. GVA differs from household income in three main respects. Firstly, GVA includes the total profits of companies. Company profits arising in the State, which accrue to residents are considerable. Secondly the workforce that produces the GVA in a region may not live there and may bring their incomes home to a neighbouring region. Thirdly, personal income includes items such as social welfare benefits and factor incomes from abroad, which are not included in GVA.



Map 1 - Study Area

- 3.10 Within the region, the highest average disposable income per capita was in Waterford (£8,300). For all other counties, average disposable income ranged from about £7,300 to £7,500.
- 3.11 The labour force in the South-East has grown by 11% between 1996 and 1999, to 172,000. National labour force growth for the period was 12%. Employment growth, on the other hand, was 16% for the same period (compared to 20% nationally), and there are now 158,000 people at work in the South-East. In both cases, growth was below levels in Dublin, the Mid-East, the Mid-West and the West, but significantly ahead of growth in the South-West, Border and Midlands regions.
- 3.12 The South-East's labour force participation rate (i.e. the percentage of the population aged 15 or over that is available for work) was 56% in 1999, compared to 54% three years previously. This was below the national average of 58%, but higher than all other regions bar Dublin, the Mid-East and the Mid-West.
- 3.13 Unemployment in the South-East has dropped from about 16% in 1996 to 8.4% in 1999. The national average is 5.7%, with most other regions experiencing unemployment rates of between 4% and 6%. The Border region, at 8.7%, currently has the highest level of unemployment.
- 3.14 The proportion of the South-East's labour force that is employed in agriculture is quite high, at 15.6% (1997 estimate). Only the West, at 19.4%, has a higher dependency on agricultural employment. Services employment in the South-East accounts for 44.3% of the labour force. This is lower than in all other regions bar the Border and West regions.
- 3.15 The overall socio-economic profile of the study area has improved considerably over the past decade. The area has a large and growing population in its catchment, and income levels and employment are up substantially. Levels of unemployment have also decreased.
- 3.16 Although the performance of the South-East region is below the national average, this must be set in the context of the huge growth experienced in the Irish economy. Because of this growth, the standard of living in all regions has improved. In addition, the performance of the immediate Waterford area has generally been on a par with national growth. Therefore, it appears likely that more people in the area will have the capacity to get involved in marine leisure activities, and that additional facilities (e.g. marina / berthage space) would be supported.
- Access**
- 3.17 The study area and its environs are currently accessible by road, rail, sea and air which greatly contributes to the attractiveness of the area, as a destination for national and visiting boats alike. The study area is served by a number of national primary roads - the N9 from Dublin, N25 from Wexford, the N25 from Cork and the N24 from Carrick-on-Suir. A number of coastal drives have been developed by South East Tourism (Hook Head Drive, Dungarvan and the Coast Drive and East Waterford Gaultier Coast Drive) which ensures good access and signage to all the key towns in the study area.
- 3.18 Waterford City is served by a direct daily train service from Dublin; Rosslare via Wexford and Limerick via Carrick-on-Suir/Clonmel. Bus Eireann operates a direct daily return coach service to Dublin via Carlow and also via New Ross; to Rosslare, Galway, Tralee and Athlone. Other private bus operators also operate in the study area.
- 3.19 The ferry between Passage East and Ballyhack is an important resource in the area, linking County Wexford and County Waterford and reducing considerably the drive time between the two counties. The ferry has capacity for 30 cars and operates a continuous year round service.
- 3.20 Ferry services also operate between Rosslare and Fishguard, Pembroke, Cherbourg, Roscoff and Le Harve and from Cork to Swansea and Roscoff. This ensures that the context area is easily accessible from abroad.

- 3.21 Waterford City Airport is located approximately 7km south of Waterford City and operates daily direct scheduled flights to and from Britain.

Tourism Profile of the Study Area⁵

- Overseas Demand

- 3.22 In 1999, Co. Waterford attracted 315,000 overseas visitors, up by 30% from 243,000 in 1993. The county attracted more visitors than any other county in the South-East, overtaking Wexford as the top South-East destination for overseas tourists. On a national basis, Waterford ranked 8th for overseas visitors, behind Dublin, Cork, Kerry, Galway, Limerick, Clare and Mayo.

- 3.23 As with Wexford and Kilkenny, visitor numbers declined between 1998 and 1999. In Waterford, visitor numbers fell by 6% from nearly 340,000 in 1998 to 315,000 in 1999. In Wexford, numbers fell by 11% from 312,000 to 277,000, while overseas visitors to Kilkenny dropped by 4% from 228,000 to 218,000.

- 3.24 Co. Waterford earned revenues of £30 mn from overseas visitors in 1999, up by nearly 40% from £24 mn in 1993. In overseas revenue terms, it ranks second in the South-East behind Wexford. In national terms, Waterford ranks 14th, behind Dublin, Cork, Kerry, Galway, Limerick, Clare, Mayo, Wicklow, Sligo, Donegal, Kildare, Wexford and Tipperary (North and South).

- 3.25 Since 1998, overseas revenue earnings in Waterford, Wexford and Kilkenny have declined. In Waterford, revenues fell by 6% from £32mn in 1998 to £30mn in 1999. Revenues in Wexford fell by over 13%, from £38mn to £33mn, while revenues in Kilkenny fell by 7%, from £30mn to £28mn.

- 3.26 Waterford's largest market for overseas visitors is the British market, which accounts for nearly 43% of all overseas visitors. North America accounts for a further 31%, followed by Mainland Europe (at 22%) and other areas (at 6%). Relative to other counties in the South-

East, Waterford attracts a high proportion of North American visitors (e.g. the equivalent figures for Wexford and Kilkenny are 15% and 24% respectively). More than half of all overseas visitors to Wexford come from the British market.

- 3.27 Over 60% of overseas visitors to the South-East cite a holiday as their main purpose of visit. Another 20% are visiting friends and relatives, with 13% travelling on business and 7% travelling for other purposes. Less than 40% of British visitors are holidaymakers, however, compared to more than 75% in all other markets. One-third of British visitors are VFRs (compared to 8% for both Europe and North America), while 21% are business visitors (compared to 10% or less for other markets).

- 3.28 By source market, British visitors appear to be relatively high spending, as they generally account for a higher proportion of overseas revenue than for overseas visitor numbers. North Americans, on the other hand, spend less per visitor, though this may be attributable to differences in average visitor length of stay.

- 3.29 There are no comprehensive estimates for the number of sailing visitors who come to Ireland each year. Previous research conducted by the Marine Institute indicates that overseas sailing visitors to the South-East come from the British market (especially Wales) and the French market⁶. At Waterford, about 90 overseas vessels visited the marina in 2000. At Kilmore Quay, the number of overseas boats visiting the marina was over 360.

- 3.30 Data on revenue earned from overseas water-based activity in the South-East is also limited, though there is evidence that the sector plays an important role in the region. Marine Institute research, for example, has estimated that overseas revenue associated with activities at Kilmore Quay marina totals £260,000 annually. Revenue estimates for overseas activity at Waterford Marina are detailed in Chapter 8.

⁵ See also Appendix 2.

⁶ Previous Marine Institute research includes a profile of boating on the Irish Sea and an assessment of the economic impact of Kilmore Quay Marina.

Domestic Demand

- 3.31 There is no county-based data available for domestic tourism activity. In the South-East generally, revenue earned from domestic tourism stood at £150 mn in 1999, up by nearly £20 mn (or 15%) on the previous year. In addition, a further £4.5 mn was earned from visitors from Northern Ireland.
- 3.32 The South-East region has traditionally been a popular destination for domestic tourists. For much of the 1990s, however, the domestic tourism market was in decline and tourism revenues in the South-East, as in other regions, fell substantially. Over the past couple of years, there has been a notable resurgence in the domestic market, with much of the recovery attributable to high-spend domestic short breaks.
- 3.33 Counties like Waterford, Wexford and Kilkenny have benefited significantly from domestic tourism growth, not just in the short breaks market but also in the traditional “based” holiday market. Urban centres in each county have expanded the short breaks market, and the coastal areas of Waterford and Wexford have benefited from significant domestic holiday home development. These developments have attracted a market with high disposable income, which most probably combines annual holidays abroad with regular additional domestic trips.
- 3.34 Having fallen to as low as 40% in 1997, the proportion of holidaymakers among domestic visitors to the South-East has grown to 60% in 1999. In addition, the number of trips taken outside the peak summer months has also grown markedly, with trips taken in the months January-April growing to 26% of all trips (compared to 20% in 1995).
- 3.35 Domestic water-based activity can be an important, though largely unquantified source of business in coastal areas of the South-East. Marine Institute research suggests that domestic activity at Kilmore Quay Marina generates expenditure of over £200,000 annually. By its nature, this activity is probably more seasonal than the general profile for domestic tourism and leisure activity. Revenue estimates for domestic activity at Waterford Marina are detailed in Chapter 8.

Tourism Supply

- 3.36 Urban Renewal has contributed significantly to the development of tourism in Waterford City, revitalising the city as a centre for tourist activity. City streetscapes and the quayside have been dramatically improved by Urban Renewal developments, while the Millennium Plaza (under development), the redevelopment of the North Quays and the planned movement of commercial port activity to Belview will further enhance the city’s attractiveness. The number of high quality retail outlets operating in the city has increased, and restaurant stock has also improved, helping to bridge the quality gap that existed previously.
- 3.37 There are over 3,200 approved visitor accommodation rooms in Co. Waterford, an increase of 24% since 1998. Stock is generally of good quality. About 42% is hotel-based, which conforms to the national average. Growth in hotel stock has reached 26% since 1998, with self-catering stock increasing by nearly 50%. In both cases, the availability of tax incentives has contributed to growth.
- 3.38 Over 40% of the county’s stock is situated in Waterford City, which has 1,300 approved visitor accommodation rooms (up by nearly 40% on 1998). Hotel stock accounts for nearly 65% of all city stock, a figure which is comparable with Dublin and is higher than for other major tourism centres like Killarney, Galway or Cork. Most of the recent growth in city stock is attributable to additional hotel capacity, which has helped to improve the overall quality of accommodation in Waterford City. New properties include the Forte Travelodge, the Waterford Marina Hotel, the Woodlands Hotel and Faithlegg House Hotel.
- 3.39 Outside of Waterford City, the other major centres of tourism accommodation are Tramore (750 rooms), Dungarvan (410 rooms) and Dunmore East (400 rooms). Accommodation in Tramore and Dunmore East is primarily self-catering, with Tramore benefiting from the tax

incentives available under the Pilot Tax Relief Scheme for Certain Resort Areas (PTRSCRA).

- 3.40 In the immediate Waterford Estuary area, there is very little tourism accommodation outside of Waterford City and Dunmore East. Places like Arthurstown and Cheekpoint have only a handful of rooms, while several surrounding villages (e.g. Ballyhack, Slade) have no registered tourism accommodation.
- 3.41 There are a number of sizeable visitor attractions in or around the study area. The largest of these is the Waterford Crystal Visitor Centre, which attracts upwards of 260,000 visits per annum (1996 estimate). The John F. Kennedy Arboretum, near New Ross, attracts over 50,000 annual visitors, while Dunbrody Abbey and Visitor Centre typically attracts up to 30,000 visits annually. The important local attractions of Duncannon Fort, Tintern Abbey and Ormond Castle are also close to the Estuary. Hook Lighthouse Visitor Centre, which attracted 25,000 visits during 12 weeks of the 2000 peak/shoulder season, also opened this year. In addition, the South-East Coastal Drive operated for the first time in 2000, attracting significant additional tourist traffic on the route.
- 3.42 Golf is probably the most well developed and popular tourist activity in the study area. The area is close to a number of high quality golf courses, including Faithlegg, Waterford Castle (both near Waterford City) and Mount Juliet (near Thomastown). Other courses are found in Dunmore East, Tramore, New Ross and Carrick-on-Suir. In addition, some equestrian activities operate near Waterford City, Thomastown and New Ross.
- 3.43 The main visitor-generating events in the area tend to be golf classics, which are run during the year at the major courses for 3-4 day periods. These events attract both overseas and domestic visiting golfers. Waterford's International Festival of Light Opera, meanwhile, also attracts visitors to Waterford City, though it has been somewhat in decline in

recent years. Other festivals and events, such as the "Spraoi" Street Festival and the Waterford Estuary Mussel Festival, tend to rely more on local attendance. There is also a local water-based activity festival on the Estuary, usually held on the June bank holiday weekend each year.

Water-based Attractions and Activities

- 3.44 Waterford Marina is the main sailing facility found in the Estuary. During 2000, the marina attracted over 180 visiting boats, 50% of which came from overseas. The premier sailing club in the Estuary is found in Dunmore East, however. It is the base for the Waterford Harbour Sailing Club, which was established in 1934 and has more than 280 members. Although there is no formal sailing facility in Dunmore East, the club attracts more than 300 visiting yachts per annum.
- 3.45 Visiting cruise liner business is a growing market in Waterford City. There has been a targeted local marketing effort designed to attract this type of business, involving the local travel trade, Waterford Crystal and Waterford Tourism (the county marketing body). In 1999, some 14 cruise ships were attracted to the inner Port of Waterford, with about 5,100 passengers⁷. In 2001, a total of 21 ships are expected to visit Waterford, carrying nearly 8,000 passengers.
- 3.46 Angling activity in the study area is mainly sea-based. There are sea angling boat charters operating out of Dunmore East and Duncannon respectively, with a typical boat capacity of 10-12 and a season running from April to October/November. Bottom, wreck, reef and shark fishing are catered for, and catches usually include conger, ling, pollock, cod and coalfish. Both areas are also popular with local anglers, as are Cheekpoint and Passage East for shore angling.
- 3.47 Apart from sea angling, the River Suir and its tributaries offer good trout fishing around Carrick-on-Suir. Salmon runs to the Suir have been poor in recent years, however, and there is

⁷ Estimates of the revenue impact of cruise liner activity are provided in Chapter 8.

only limited salmon angling available in the lower reaches around Carrick-on-Suir. A new coarse fishing site has been established near New Ross, with stocks of common carp, minor carp, tench and bream.

wreck diving and marine life in the area's deep open gullies (including seals, dolphins and diving birds as well as other underwater marine life). Outside of the Estuary, diving centres are also found at Kilmore Quay, where the activity is worth about £70,000 a year.

3.48 In the surrounding area, stretching from Dungarvan to Kilmore Quay and Wexford, shore angling is common and there is an active local resident market. There are a couple of sea angling boat charters operating out of Dungarvan, and about five full-time seasonal boat charters operating at Kilmore Quay (with numerous other part-time seasonal boats). At Kilmore Quay, sea angling charters generate an estimated £170,000 in revenue per annum, 60% of which is overseas-originating.

3.53 The natural resources of the study area are an important attraction for visitors. The coastlines of Waterford and Wexford have some of the best beaches in the country and, as previously mentioned, are very popular with domestic holidaymakers. In particular, the area around Arthurstown/ Duncannon is a popular location for privately owned holiday homes, while Dunmore East has a "Blue Flag" beach.

3.49 Much of the River Barrow is a mixed fishery, holding both game and coarse fish. Most of the main angling sections of the river are situated upstream from the Estuary, however.

3.54 Parts of the South Wexford coast are an important internationally recognised environmental resource, both as a landscape and for bird-watching. The Hook Peninsula, located on the edge of Waterford Estuary, has some of the oldest rocks in Europe and attracts occasional research trips to the area. The South Wexford coast is also regarded as the finest example of barrier (i.e. dune) coastline in Ireland, composed of coarse sediments topped with finer sands. Seabird colonies, meanwhile, are found on the Hook Peninsula and (outside the Estuary) on the Saltee and Keeragh Islands. Eco-tourist use of these resources are limited, however.

3.50 There are activity/adventure centres located at Dunmore East, Shielbaggan (near Arthurstown) and Thomastown. The centres at Dunmore East and Shielbaggan both have a strong emphasis on water-based activities. At Dunmore East, activities include sailing, canoeing, kayaking and windsurfing. Shielbaggan offers activities like general sailing, canoeing, snorkeling, board sailing, dinghy sailing and bird watching. Both centres open year round, and are popular with the schools/youth markets.

3.55 Despite recent investment, the Barrow Navigation has still to develop significant levels of tourist activity. There are 7-8 cruise hire operators servicing the river, mainly small-scale, with a fleet of 40-42 cruisers (out of a total inland cruise hire fleet of c.500)⁸. These boats can only operate as far as St. Mullins for insurance reasons. Inland cruise hire is therefore not a market that is developed within the Estuary.

3.51 Surfing centres (apart from the activity generated by the adventure centres) are not found within the Estuary itself. The main surfing centre in the area is found on the nearby coast, at Tramore.

3.56 Most of the activity on the Barrow appears to be private boats. It is estimated that there are around 600 private boats operating on the Grand Canal/Barrow Navigation system. Many of these boats would differ from the standard

3.52 Diving is a popular activity around Hook Head, and there is a diving centre attached to the nearby sea angling club in Fethard-on-Sea. There is also a Waterford Harbour Sub Aqua Club, which mainly operates out of Dunmore East. Main diving attractions in the area include

⁸ Includes all operators on the Grand Canal/Barrow Navigation system. The largest operator is Celtic Canal Cruisers, based in Tullamore, with a fleet of 20 boats.

type of boat used by cruise hire operators, and would be more suitable to travel as far as the Estuary. Although there is no historical data available, discussions also suggest that the level of private boat ownership on Ireland's inland waterways is growing.

and small scale tourist and outdoor sport and recreational development will be permitted provided such development is sensitively related to the distinctive character of the landscape. Large scale developments will not normally be permitted.

Nature Conservation Designation

3.57 There are 3 types of nature designations currently in force or proposed by national government (NHAs, SACs, SPAs). Map 2 illustrates nature/landscape designations in the study area. Natural Heritage Areas (NHAs) are sites of national importance by reason of their flora, fauna, geological or physiographic interest. They are part of the strategic network of areas originally identified by An Foras Forbartha as areas of Scientific Interest. Duncannon Sandhills, Ballyhack, Dunmore East Cliffs, Hook Head and the River Barrow as far as New Ross are designated as proposed Natural Heritage Areas.

3.58 Special Areas of Conservation (SACs) are areas of special importance to wildlife habitats and species and will form part of the Irish contribution to the EU Natura 2000 Network. Natura 2000 is an EU network of ecologically important sites which member states are required to establish. Part of the Lower River Suir, extending from Cheekpoint to Carrick-on-Suir is a proposed Special Area of Conservation as is Hook Head and part of Waterford Harbour between Passage East and Creadan Head, Ballyhack and the River Barrow.

3.59 There are no Special Protection Areas (SPAs) in the study area.

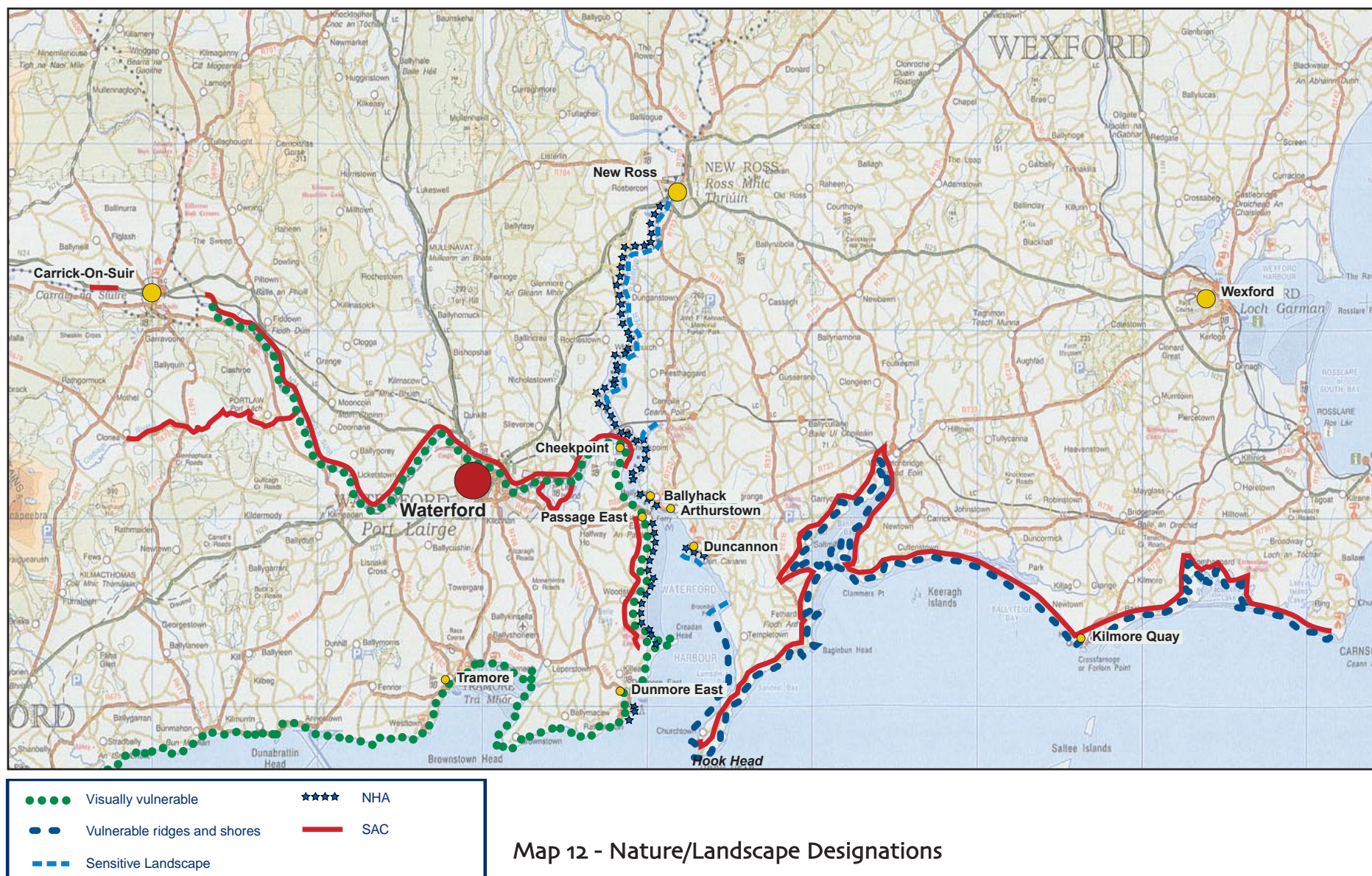
3.60 The Draft Wexford County Development Plan 2000 classifies the landscape into different policy areas. Part of the coast around Ballyhack and sections of the River Barrow from Cheekpoint to New Ross are designated as 'Sensitive Areas' which are areas of high scenic amenity. The Draft Development Plan states that in these zones planning applications have to show an awareness of the limitations of the site by having a high standard of site selection. Small scale developments required to meet the social and economic needs of rural communities

3.61 Part of the coast from Hook Head to Broomhill Point is designated as a 'Vulnerable Area'. Development in these areas must be shown not to impinge in any significant way upon the character of the coastline. As in 'Sensitive Areas' small scale tourist and outdoor sport and recreational development will be permitted as long as they are sensitively related to the distinctive landscape character and heritage of the area.

3.62 The Draft Wexford County Development Plan also contains policies on coastal development and divides the landscape into different zones. Hook Head to Duncannon and areas around Duncannon and Arthurstown are included in Landscape Area 1. Areas designated "Area 1" are characterised by containing a high combination of environmentally sensitive factors. The Draft Development Plan states that there will be a presumption against future intensive development within these areas. However small scale sustainable employment, enterprises and tourism development may be considered particularly if they involve the re-use of redundant rural buildings.

3.63 Parts of Duncannon, Arthurstown and Ballyhack are zoned 'Area 3'. Land designated as "Area 3" includes developed and development lands in villages and settlements. These areas have the environmental potential to absorb concentrations of coastal development.

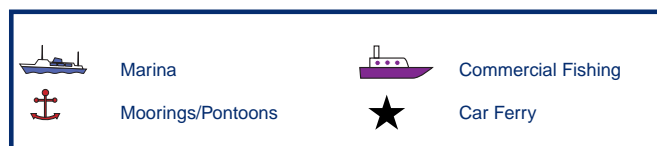
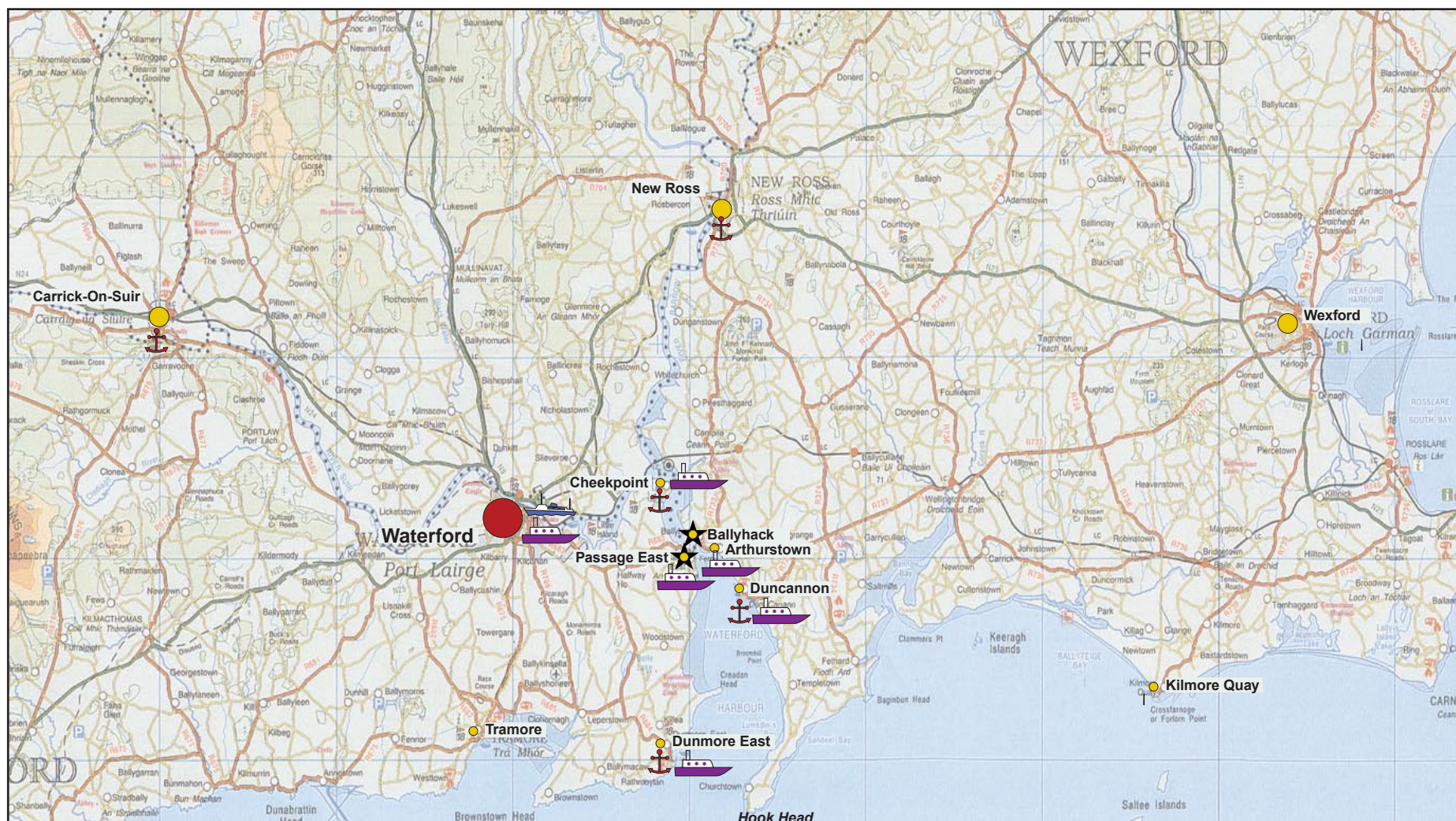
3.64 The Waterford County Development Plan 1999 also contains a scenic landscape evaluation. All of the Waterford Coast, extending as far as Carrick-on-Suir, is designated as 'visually vulnerable'. Any development in the environs of areas designated as 'vulnerable' must be shown not to impinge in any significant way on the character, integrity or uniformity when viewed from the surroundings.



- 3.65 Within the study area there are a number of areas designated as conservation areas and also areas designated under local development plans. As development plans are in operation for 5 years there is a need for them to be flexible so as they can adapt to changing economic conditions and environmental standards. However, this can result in development plans containing vague concepts. In the case of the development plans in force in the area, different landscape areas are mentioned, although the type of development that is permissible in the different zones is not clearly identified. In order to facilitate the development of additional mooring facilities in the estuary there is a need for the development plans to contain more positive statements with regard to the provision of additional facilities.
- 3.69 There are also proposals to dredge the harbour at Dungarvan but at this time there are no plans to develop any boating facilities here.
- 3.70 Waterford estuary which has been defined for the purpose of this study as the area of navigable water between Hook Head, Dunmore East and the confluence of the rivers Suir and Barrow is approximately 9 nautical miles (18km) from north to south varying in width from 0.5km at Passage East to 5km at Hook Head. The total area of navigable water is approximately 6000 ha.
- 3.71 Whilst the lower reaches of the estuary are exposed to winds from southerly and south westerly directions it remains an ideal cruising ground under most conditions during the traditional boating season. With the advent of marina berths however, the season has become extended but the estuary can still provide many areas where cruising can take place all year round.

Marine Infrastructure

- 3.66 There are a number of marinas within the context area. Existing marina facilities in the study area are illustrated on Map 3. Established marinas are located at Kilmore Quay (60 berths), while a 50 berth marina is currently under construction in Wexford Town. Wexford County Council has plans to expand the facilities in Kilmore Quay but this is dependent on support from the local community and finance being available.
- 3.67 There are proposals to develop boating facilities at Helvic and Tramore in County Waterford. Waterford Corporation and Waterford County Council are applying for funding from the Department of the Environment and Local Government to carry out a feasibility study on developing a marina at Tramore. This project is at an early stage with funding currently being sought under the Public Private Partnership Programme.
- 3.68 In 1998 Meitheal Mara na Rinne prepared a Marine Tourism Project for Helvic, which is a traditional fishing port. The project proposed the development of a 20 berth marina along with the promotion of sea angling and a water sports activity and training centre. A grant has been secured from the Department of Arts, Culture, Gaeltacht and the Islands to carry out site investigation works.
- 3.72 There are a number of places within Waterford estuary with a degree of natural shelter and where berthing infrastructure has been provided. These small harbours were created to serve the fishing fleet and are therefore not necessarily suitable for today's leisure craft. However, in some cases the existing infrastructure can be modified or extended to provide berthing for both fishing and leisure activity.
- 3.73 The following are places of interest in the estuary where the provision of additional berthing facilities would be beneficial in promoting cruising within the estuary. The establishment of facilities at these locations should provide the infrastructure to enable greater use of the estuary to be achieved. Whilst it will be the intention to promote cruising, boating, fishing and other marine leisure activities throughout the estuary, the facilities will be available for all marine related leisure activity. At some locations where there is a sufficient number of local boat users a marina - type development may be appropriate. At others, a facility which provides a



Map 3 - Existing Marine Facilities

convenient stopping off point or short stay berthing only may be adequate.

- 3.74 The establishment of new centres of boating activity should follow the introduction of new facilities. Organisations such as sailing, angling, water skiing and diving clubs will help to generate greater interest in a range of marine activity.
- 3.75 Where practicable, new facilities should have a multi-purpose function so that each sector of the market can be accommodated as it develops. The provision of public slipways for example would give greater access to the water from land and would encourage greater use of the estuary by the casual and less committed boat user.
- 3.76 The most appropriate facility at each of the following locations may range from a multi-berth marina in the most popular area to a slipway and simple pontoon boarding facility in the less popular areas. Map 4 illustrates the town profile

Dunmore East

- 3.77 Located approximately 8 miles from Waterford City with a population of 1,430 Dunmore East is a very picturesque village which attracts both day trippers and overnighing holiday makers. The town provides a range of services including bars, restaurants, hotels and self catering accommodation. A Bluegrass Festival takes place in the town each August.
- 3.78 Dunmore East is designated as a National Fishery Harbour and it would appear that the fishing industry takes precedence over marine leisure activities. This was not always the case. In the past the harbour was very popular with yachtsmen who at that time were offered berthing space in the relatively sheltered water of the harbour. More recently the harbour can no longer provide adequate space for fishing and leisure use and the yachtsmen have been forced to make alternative arrangements.
- 3.79 The development of Kilmore Quay Marina has provided berthing for many who would have

gone to Dunmore East but Kilmore Quay is 15 nautical miles (30km) from Dunmore East and is not necessarily a suitable alternative. Dunmore East Harbour is strategically placed at the entrance to Waterford Estuary and would make an ideal location for a leisure berthing facility. There are currently a number of swinging moorings available to visitors but these do not have the convenience of pontoon berthing. Ideally, a similar development to that which has taken place at Kilmore Quay is required so that both commercial and leisure sectors can be accommodated. A leisure berthing facility at Dunmore East would provide the ideal stop-off or permanent mooring for those cruising the lower reaches of the estuary and those making a passage along the south coast.

- 3.80 Local opposition, mainly deriving from the fishing community, has hampered previous proposals for the development of a marina. A study has been prepared on the infrastructural requirements of Dunmore East by KPMG for the Department of the Marine and Natural Resources. This report recommends that Dunmore East should continue to be one of the core fishing harbours in the Country. As part of proposals for the harbour the report recommends that the east pier be extended by at least 150metres. This would facilitate the development of a marina at a later stage by private interests.

Duncannon

- 3.81 Duncannon is located on the Hook Peninsula and is the first location within the estuary which has the potential for providing accommodation for visiting boats. The village is a traditional seaside resort and fishing port. A 16th century fort is located in the town and is open to visitors. Duncannon hosts its own summer festival in July each year. Duncannon is approximately 5 nautical miles (10km) from Hook Head/Dunmore East.
- 3.82 The harbour at Duncannon is used primarily by local fishermen. The original harbour basin is well protected by its masonry pier but dries out completely at low water springs. The lack of adequate water depth is a major deterrent to

the creation of visitor berthing. Nevertheless, the Hook Tourism Development Association are investigating the feasibility of providing a basic pontoon boarding facility to be located off the end of the existing pier. Unless dredging is carried out the water depth will be restricted but should be adequate for shallow drafted motor boats at most stages of the tide.

- 3.83 The main working part of the harbour has been created by a second pier which provides berthing space for fishing boats and provides shelter from the southerly winds. The pier largely dries out at low water and does not therefore attract visiting yachtsmen.
- 3.84 Adequate water depths are available a short distance from the main pier and a pontoon berthing facility could be located in that area. There is a greater degree of exposure however and it may be necessary to bring the pontoons ashore during the winter period.

Arthurstown

- 3.85 Arthurstown, a small fishing village, is located in County Wexford at the neck of Waterford Harbour approximately 1.5 nautical miles (3km) north of Duncannon. There was a proposal in the 1990's to develop a marina facility at Arthurstown however due to lack of finance the facility was never developed.
- 3.86 The inlet at Arthurstown would make a natural harbour for a major development were it not for the lack of water depth. The existing pier on the southern side of the inlet provides shelter for a small number of boats but as with Duncannon it largely dries out at low water.
- 3.87 Arthurstown is an attractive village with new developments under construction and would make an ideal stop-off point for those cruising the estuary. It is understood that the drying mud flats are now a protected area for shell fishing and that major dredging would not be permitted. There is an area off the north west end of the existing pier where a berthing facility could be provided. The area is exposed to the north west and to the south but would be tenable in most conditions.

Passage East

- 3.88 Passage East is located approximately 6 miles from Waterford City and has a population of 573. The town is connected to Ballyhack in Co. Wexford by a year round ferry service. There are no major tourist sites in Passage East although a tourist information office is located in the town. Passage East is home to the annual Waterford Estuary Mussel Festival and the Power Clan Rally.
- 3.89 As a harbour, Passage East suffers greatly from siltation and almost totally dries out at low water. Despite its tidal restrictions, it remains a popular anchorage for small vessels and a small fishing fleet also operates out of the harbour. Deep water is reached relatively quickly beyond the north pier and south quay. The Port of Waterford has established a new pilots station in the village and heavy duty pontoons which will be available to both the pilot boat and visiting cruise ships. A planning application has been lodged with Waterford County Council by the owners of the Passage East Car Ferry for the provision of a new slipway for the ferry along with a marina and a berthing facility for cruise ships.
- 3.90 Unprotected pontoon berthing would not be suitable for longterm unattended use by leisure craft. However, pontoon berthing for short-term and overnight stays could be located on the southern side of the harbour where it would not present a hazard to the car ferry.

Ballyhack

- 3.91 Ballyhack village lies immediately across the estuary from Passage East. The estuary between Ballyhack and Passage East narrows to 600m at this point and provides the natural place for the car ferry. A Heritage Centre is located in the 15/16th Century castle in the town centre. Although Ballyhack is a small village its harbour provides shelter for a number of small fishing boats and leisure craft as well as the terminal for the car ferry from Passage East. The harbour basin largely dries out at low water and is currently not suitable for providing berthing space for visiting yachtsmen.

- 3.92 Boat building and boat repair facilities are currently available. Fresh water and diesel fuel are also provided at the harbour.
- 3.93 Wexford County Council has plans to develop a 20/25 berth pontoon facility which will be made available to the local fishermen and local and visiting yachtsmen. The intended location is immediately south of the ferry slipway where there is deep water and minimum interference with the ferry operations. This is considered to be a worthwhile development and one which should prove to be extremely popular with resident and visiting boat owners.

Cheekpoint

- 3.94 Cheekpoint is located 8 miles from Waterford City and has a population of 320. The village is located on a headland above the confluence of the Suir and Barrow Rivers. The harbour and its approaches suffer from heavy siltation and at present would not be suitable for pontoon berthing with shore access. The situation could improve however, if the area is included in the Port's dredging programme. Although the village at Cheekpoint is small with few amenities it is well placed for stopping-off when entering or leaving the river Barrow on passage to or from New Ross.

Kilmokea Point

- 3.95 Kilmokea Point is located on the eastern bank of the river Barrow at its confluence with the river Suir. Kilmokea Point is the site of an electrical power station which has its own quay and mooring dolphins.
- 3.96 The quay has on occasion been used for the berthing of large cruise ships for tourists visiting New Ross and surrounding areas. There are currently no facilities for berthing small craft but it has the potential for providing a stopping-off point in an emergency.

New Ross

- 3.97 The town of New Ross is situated approximately 9 nautical miles (18km) upstream on the river Barrow. The greatest depths are generally in the centre of the river

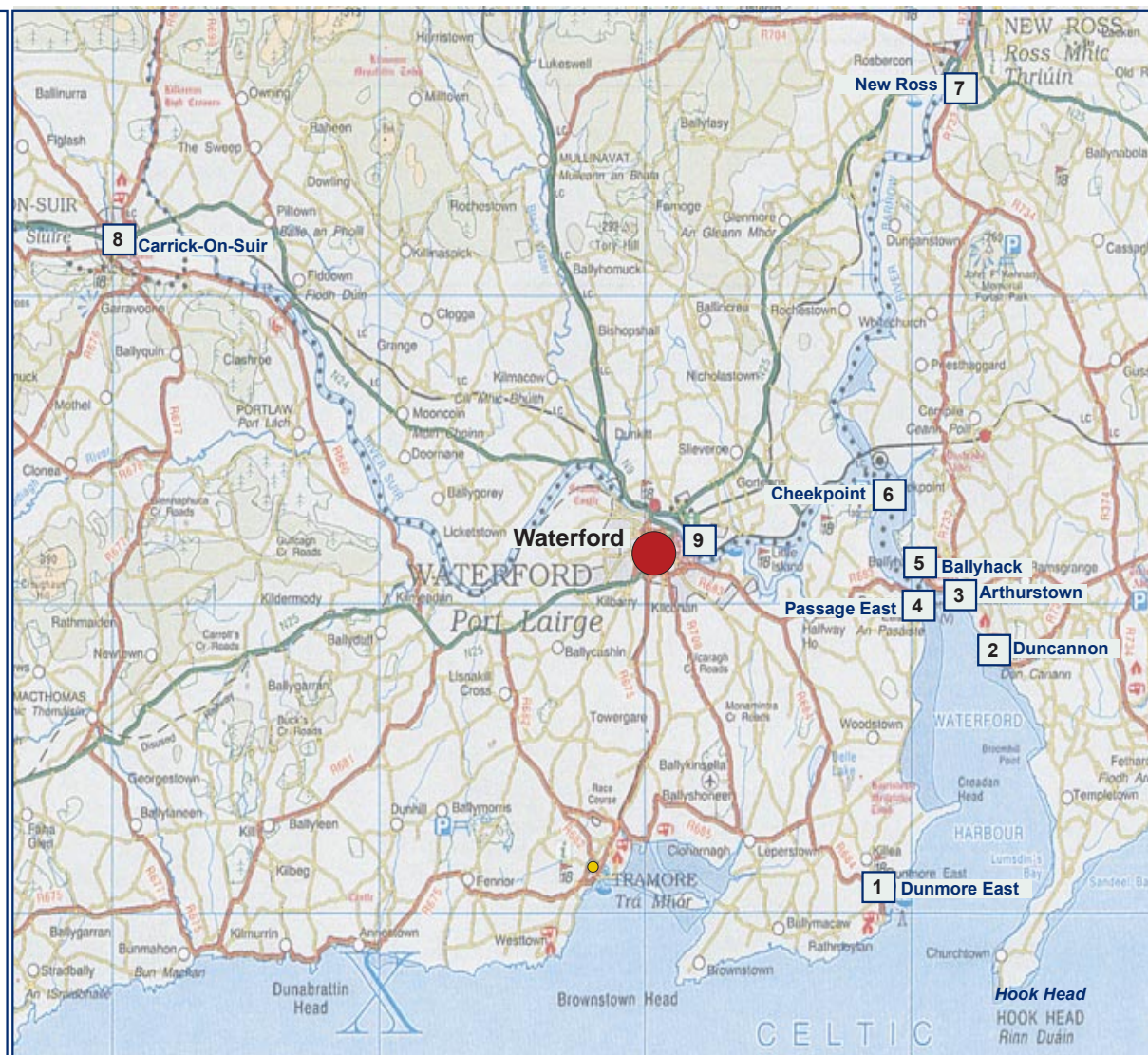
and therefore navigation for small craft is straightforward. The port at New Ross is operated by the New Ross Harbour Commissioners and there is also an active boating club in the town with a berthing pontoon upstream of the N25 road bridge. The commercial quays are on the west bank downstream of the bridge. There is potential for leisure craft berthing on the east bank.

- 3.98 The New Ross Port Company has expressed an interest in providing pontoon berthing for resident and visiting boats. The proposed site is immediately downstream of N25 road bridge on the eastern bank. Existing water depths are adequate for leisure boats. The provision of pontoon berthing in the heart of New Ross would be a great attraction to cruising yachtsmen and would encourage greater use of the river.

Carrick-on- Suir

- 3.99 The town of Carrick-on-Suir is located approximately 15 nautical miles (30km) upstream from Waterford City Marina. The town is regarded as the upstream limit of the tidal section of the river Suir. There are a number of tourist sites in the town including Ormond Castle and Manor House Heritage Centre. The East Munster Way walking route also traverses the town following the route of the old towpath.
- 3.100 Although Carrick-on-Suir lies beyond the main area of interest for the study it is a lively town and will attract cruising yachtsmen from Waterford City if suitable pontoon berthing is provided. Approximately 40m of very basic pontoon berthing is currently provided but the facility and its immediate surroundings are not particularly attractive to potential visitors. Improved berthage and environmental improvements to the waterfront area would be beneficial.

- 1 Dunmore East**
National fishery harbour
Swinging moorings available
Strategically placed
Pontoon facility outside harbour would require breakwater protection
- 2 Duncannon**
Fishing harbour
Well sheltered
Inner harbour and main pier virtually dry at low water
Provision of basic pontoon boarding at end of existing pier is being investigated
- 3 Arthurstown**
Small fishing village
Dries out at low water
Mud flats are protected areas
Berthing facility could be provided off existing pier
No proposals to provide additional facilities
- 4 Passage East**
Car ferry
Small fishing fleet
Suffers from siltation
Almost dries out at low water
Heavy duty pontoons provided for pilot station
Proposals to relocate ferry slipway & provide additional berthing for leisure boats
- 5 Ballyhack**
Car ferry
Existing harbour
Relatively sheltered
Harbour basin dries out at low water
Wexford County Council have plans to develop berthing facility
- 6 Cheekpoint**
Small fishing harbour
Harbour suffers from siltation
No proposals to develop additional facilities
- 7 New Ross**
Existing port facilities and boat club
Very sheltered quays
Adequate water depths for pontoon on East quay
Proposal to provide pontoon berthing for resident and visiting boats
- 8 Carrick-on-Suir**
Basic pontoon berthing provided
Very sheltered site
In need of environmental improvement
No proposals to develop additional facilities
- 9 Waterford City**
Existing Marina
Proposals to develop marina on north quay



Map 4 - Town Profile

4. WATERFORD CITY MARINA

4.1 Traditionally the port of Waterford was focused on the South Quays in Waterford City but the carrying out of port activities at this location was deemed to be inappropriate due to its proximity to the city centre. Gradually the port business moved from the South Quays to the North Quays at Ferrybank. Due to changes in port traffic, a containerised port was opened in 1993 at Belview some 4km downstream of Waterford City and much of the port related activities moved from the city centre to this new location.

4.2 The development of Belview Port changed the overall environment of the quay front, thereby facilitating the development of marine leisure activities in Waterford City. There is still some port related activities taking place on the North Quays. However, there are plans to remove all port activities from the city to Belview Port in the near future. This will facilitate the redevelopment of the North Quays which will be discussed later on in this report.

4.3 Waterford City Marina was opened in July 1997 and initially had capacity for 40 berths located at Adelphi Wharf/Reginald Tower Quay. The first phase of the marina was part funded under the Operation Programme for Urban Renewal and it has been a major contributing factor in the enhancement and improvement of the Waterford Quays. Due to the success of the facility an additional pontoon (230m long) was added in 1998 and the marina now accommodates 80 boats. Water and electricity are available on the pontoon while toilets and showers are available in Viking House Hostel nearby.

4.4 The downstream section of the marina, the first to be developed, would appear to be a more popular facility than the upstream one. This is due to the fact that the downstream section is more sheltered from river currents, has a more attractive setting opposite Reginalds Tower and is closer to the car parking located on the quays.

4.5 There was no opposition to the development of the marina within the city from local residents,

the Port Authority or users of the port, and to date there have been no major incidents between commercial shipping and leisure users in the estuary. Prior to the development of the marina there were old hulks in the water which had open access. These hulks were located where the first phase of the marina was developed and were used for mooring purposes by a small number of trawlers and small punts. These users were facilitated by Waterford Corporation when the existing marina was under construction through the provision (which is still there today) of a pontoon on Johns River during the construction phase and also through guaranteed low rates for small boats.

4.6 The Waterford City marina is unusual in two respects - it is the only marina to be situated in the centre of a major Irish city and it has been developed and operated by a local authority, Waterford Corporation. This has meant that berth charges are low in comparison with many privately operated marinas.

4.7 Facilities on the marina are very basic (electrical power, light, water, emergency cabinets and ladders). The provision of additional landside facilities, such as an office, fuel supply, shower/toilet/laundry facilities, may prove difficult due to the lack of available land adjoining the marina. A car park is located on the landside of the original marina while the 'Millennium Plaza' is being developed alongside the second phase of the marina. However, the lack of facilities to date has not hampered the up-take of berths within the marina.

4.8 Due to the marinas distance from the open sea and also the tidal nature of the river the marina is more suited to power boats. This is supported by statistics which indicate that of the 81 berth holders, 63 of them own motor boats.

4.9 The majority of users of the facility are 'locals' who rent a berth at the marina for a specified period. Of the eighty first berth holders sixty eight are from Waterford City and County while the remaining holders are located throughout Counties, Wexford, Kilkenny, Laois, Kildare and Tipperary. Only one berth holder resides outside Ireland, in Wales.

Table 4.1 : Residence of berth holders in Waterford Marina

Passage East	5
Dunmore East	4
Tramore	6
Clonmel	1
Kilmacow	3
Rosslare	1
Port Laoise	1
New Ross	1
Portlaw	1
Rathangan	1
Thomastown	1
Kilkenny	2
Wales	1
Rest of Waterford	53

4.13 As stated earlier the Port of Waterford intend to relocate all port activities from Waterford City to Belview Port. This relocation will require the expansion of services at Belview and this can only be accommodated through the sale of land on the North Quays. A 'Development Vision for Waterford North Quay' was prepared by the OPW in 1998. The vision proposed the development of a hotel with associated marina facilities. The North Quays is 16 acres in extent, of which the Port proposes 12 acres for re-development. A feasibility study on the 'event building' is currently being undertaken by DTZ Sherry Fitzgerald. This study will form part of a submission to the Draft Waterford Corporation Development Plan which is currently being prepared by Waterford Corporation.

4.10 The facility does not attract a great number of visitors to the marina. The marinas location 20km from the open sea combined with the high occupancy by berth holders and the fact that it has not been marketed abroad as a possible destination has meant that the facility has not been utilised by visiting boats to the same extent as other facilities located along the coast.

4.11 The success of the existing marina in Waterford City has fuelled proposals for the development of additional marina facilities. Planning permission was granted by Waterford Corporation in 1998 for a 30/35 berth private marina at Adelphi Quay. To date this marina has not been developed due to opposition from the Waterford Boat Club⁹ who have objected to a foreshore licence for the facility on the basis that it will disrupt the operation of the boat club.

4.12 The Port of Waterford have recently installed 6 pontoons further upstream of the existing marina. The Port has had inquiries from a number of large boat owners (in excess of 50ft) who are keen to acquire a berth at this facility.

⁹ Waterford Boat Club is a local rowing club. there is no boat club amongst the boat users who use the marina.

5. TECHNICAL ANALYSIS OF WATERFORD MARINA

Location

- 5.1 Waterford Marina is located at Adelphi Wharf/Reginald Tower Quay on the south bank of the River Suir in Waterford City. The marina occupies a section of the quays which extend downstream from Redmond Bridge. The quays on the south bank are no longer used for commercial shipping and so they have provided suitable means of access to the marina structure.
- 5.2 Relocation of the commercial activity has freed up valuable waterfront space and the area between Redmond Bridge and Adelphi Wharf is being transformed with the focus being moved to retailing leisure and open space. The marina is therefore well placed to benefit from the facilities which can be provided by this vibrant part of Waterford City.

Size

- 5.3 The marina provides 790m of fore and aft berthing which at an average berth length of 10m can theoretically accommodate 79 boats. Eighty one boats are currently registered and their sizes range from 3m to 15m. The average length of the registered boats is 8m.
- 5.4 With the current arrangement, berth holders are not assigned to a particular berthing space and in certain circumstances this can lead to inefficient use of space. It is likely that rafting of boats would be required if all registered vessels were to be accommodated simultaneously.

Shelter from Wind and Wave Action

- 5.5 The marina location benefits from natural shelter from wind and waves to the degree where neither fixed nor floating breakwaters are required.

Navigation

- 5.6 The importance of Waterford as a commercial port ensured that adequate aids to navigation were already in place prior to the establishment

of the marina. The passage to the marina from the open sea is therefore well marked and the sailing instructions are fully documented.

Water Depths and Currents

- 5.7 The South Quays have always been subject to silt deposition and deep water was generally not available alongside the actual quay face. Commercial shipping used to berth alongside floating hulks thus keeping them out from the shallow banks.
- 5.8 The marina berths have been located at 15m and 30m out from the quay so that adequate water depth is available throughout the tidal cycle. The tidal range between MLWS and MHWS is 4.1m and the minimum water depth in the marina at low water springs is approximately 1.8m. The River Suir narrows to approximately 200m at Waterford City. The combined current from river flow and ebb tide can reach 3 knots (1.5m/sec) and this has had a major influence on the location and orientation of the marina berths.

Berthing Structure

- 5.9 The marina berthing does not adopt the conventional system of walkways and finger berths. Berthing at Waterford is provided by a single line of pontoon walkways located parallel to the quayside and in line with the river and tidal flows. This orientation allows easier manoeuvring to and from the berths when strong currents have to be encountered. This orientation also reduces the encroachment into the navigable channel where it would be more likely to interfere with other shipping movements. With the diminishing commercial activity at the city quays however, interference with other port users is now less significant.
- 5.10 The berthing structure consists of two independent lines of pontoon walkways which were installed in 2 phases. The first phase consists of 13nr 11.5m long and 2nr 7.5m long walkways connected to give a 165m long structure. The walkway width is 2.5m. The second phase which was provided a year after the first phase consists of 20nr 11.5m long walkways, also 2.5m wide connected to give a 230m long structure. The 2 phases are not

connected and are therefore accessed by their own bridge from the quay. The two sections of marina walkway are separated sufficiently to permit access to the inner berths. A continuous length of walkway may have created a more difficult passage to the less favoured inner berths.

- 5.11 The pontoons are "System 21" walkway units manufactured by Walcon Marine Ltd. The units consist of galvanised steel frame, hardwood decking and fenders, fibre concrete protected expanded polystyrene floats. Mooring cleats are provided at 3m spacing. This is an extremely popular pontoon system having been used world-wide for over 25 years. It is a reliable system requiring little maintenance and should remain serviceable for at least 20 years.
- 5.12 Pontoon restraint is provided by 10nr 350mm dia steel piles in Phase 1 and by 11nr 500mm dia steel piles in Phase 2. The piles have a bituminous protective coating and given normal rates of corrosion should have a life of at least 50 years. Pile guides are internal so that unrestricted berthing is provided.

Pontoon Services

- 5.13 Pontoon services include electrical power, light, water, emergency cabinets and ladders. The following distribution of services has been provided.

Service	Phase 1	Phase 2
Power & light bollards	9nr	13nr
Emergency cabinets	2nr	2nr
Emergency ladders	6nr	2nr
Water Outlets	4nr	6nr

- 5.14 Services have been provided by Rolec Services Ltd a company with considerable experience in the servicing of marina installations.
- 5.15 Navigation lighting consists of a vertical pair of red lights at each end of the pontoon walkways. These are easily distinguishable from the surrounding lights on the quay and provide adequate guide for mariners.

Pontoon Access and Security

- 5.16 Access to the marina pontoons is provided by a 14m elevated walkway and 16m bridge on phase 1 and a 16m bridge on phase 2. The width in each case is 1.5m. The elevated walkway is supported on a steel pile and the 2 bridges are supported by 7.5m by 2.5m pontoons. The access walkway and bridges have bulk head lighting for safe night use.
- 5.17 Security of the marina is provided by lockable gates and fencing at the head of each access bridge. A magnetic lock is activated by a smart card issued to bona fide marina users. The system works well and there are no reports of breached security. However, the questionnaire conducted amongst users of the marina indicated that 14% would like to see security improved on the marina while 9% would like a caretaker to be on the marina full time.

Shore Facilities

- 5.18 There are currently no shore facilities which are dedicated to serving the marina. This is not unusual with a marina of modest size in a location where many facilities can be provided by the city traders. Whilst this situation may be satisfactory at present it is likely that certain facilities such as a Berthing Masters office with berth holders toilet and washing facilities will have to be provided in the future, if expansion of the marina takes place.
- 5.19 Approximately 85% of the current berth holders have motor boats and motor cruisers. Their construction and fittings are designed for low maintenance and so there is not a great demand for yacht haul-out or drying out facilities at the marina. Such facilities are currently provided at Ballyhack in County Wexford some 7 nautical miles downstream of Waterford City marina. Free public car parking is currently available adjacent to Phase 1 pontoons. Variable car parking charges apply to the remaining areas along the south quays.
- 5.20 As the marina expands, dedicated berth holders car parking may need to be provided and the cost of such arrangement can be linked to berthing fees.

6. LEVEL OF ACTIVITY AT WATERFORD MARINA

Routes Taken by Visiting Boats and Residential Boats

- 6.1 The majority of boats visiting Waterford Marina originate at ports to the east of the marina (e.g. Kilmore Quay, Dunmore East, Milford Haven), but do not make onward journeys along the south coast upon leaving Waterford. Two-thirds of boats return in the direction from which they came, with one-fifth travelling on to ports such as Crosshaven or Kinsale. Only 8% of visiting boats travel from west to east (though some of those heading for Dunmore East might thereafter head west).
- 6.2 Kilmore Quay appears to be an important "link" for generating visiting activity at Waterford.

Nearly 60% of boats visiting Waterford Marina originate at Kilmore Quay, with over 40% citing it as their next port of call. For 30% of visiting boats, Kilmore Quay is both their last and next port of call.

- 6.3 These patterns of activity might suggest that Waterford is more than just a stop-off point, and that the marina has status as a destination in its own right. The relatively high length of stay in Waterford (see Chapter 8) would also suggest this. On the other hand, this also suggests that Waterford is not tapping into the market for cruising along the south coast. This market may still prefer Dunmore East as the optimal stop-off, and there may therefore be some distinction between the types of visitor that each port attracts.

Table 6.1: Routes Taken by Visiting Boats to Waterford Marina 2000

Last Port of Call	Next Port of Call	No. of Boats	% of Boats
Kilmore Quay	Kilmore Quay	19	30.2
Kilmore Quay	Crosshaven	7	11.1
Kilmore Quay	Milford Haven	6	9.5
Dunmore East	Dunmore East	5	7.9
Dunmore East	Kilmore Quay	4	6.3
Milford Haven	Milford Haven	4	6.3
Crosshaven	Kilmore Quay	3	4.8
Milford Haven	Crosshaven	3	4.8
Kilmore Quay	Dunmore East	2	3.2
Kilmore Quay	Kinsale	2	3.2
New Ross	New Ross	2	3.2
Inistioge	Inistioge	1	1.6
Kilmore Quay	Arklow	1	1.6
Helvick	Kilmore Quay	1	1.6
Dunmore East	Scilly Isles	1	1.6
Crosshaven	Milford Haven	1	1.6
Kinsale	Dunmore East	1	1.6
TOTAL SAMPLE SIZE		63	100.0
East-West		12	19.0
West-East		5	7.9
East-East		42	66.7

Source: Waterford Corporation

Note: Sample based on boats visiting during August and September.

- 6.4 There is some evidence of activity originating on the inland waterways, at locations like New Ross and Inistioge. Numbers to date are very small, however, at less than 4%.
- 6.5 There is no data available on the routes taken by resident boats when sailing out of Waterford Marina, though a lot of the activity of permanent berth holders appears to be based around the Estuary.

Interaction with commercial shipping

- 6.6 The interaction between the commercial shipping and leisure boat activity has been investigated. There are two matters to be considered:-
- (i) Possible congestion on the stretch of river Suir between the marina on the south bank and the commercial quays on the north bank.
 - (ii) Possible congestion and conflicting vessel movements on the River Suir downstream of Waterford City and in the Waterford Estuary.

Interaction in Waterford City

- 6.7 Records of commercial shipping activity for the years 1998 and 1999 have been obtained from the Port of Waterford. Appendix 3 provides information on the category of vessel, tonnage and cargo. However it is the total number of shipping movements which has particular relevance to any possible congestion on the river. In 1998 the total number of arrivals was 867 and this rose to 935 in 1999. The average total shipping movements for the years in question was therefore 1802. Although the number in 1999 was greater than 1998 this should not be taken as a trend in commercial activity. As stated elsewhere in the report it is the long term objective of the Port to move all commercial activity to the developing facilities downstream at Belview. Any possible conflict between commercial and leisure activity in the city will therefore become less likely as time passes.
- 6.8 To date there have been no reported incidents of conflict between the 935 commercial ships and the 80 leisure craft registered at the marina.

- 6.9 The layout and orientation of the marina berths has ensured that their presence does not intrude into the area normally required for commercial shipping manoeuvres. As a consequence of the water currents created by tidal movement and river flow, it is unlikely that the marina will ever extend further into the main body of the river where it could present a hazard to commercial shipping.

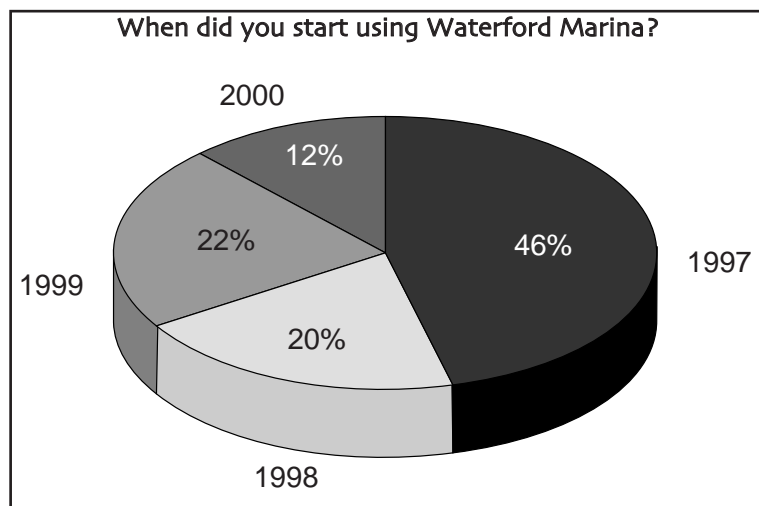
Interaction in Waterford Estuary

- 6.10 The deep water passage from the mouth of the estuary to Waterford city and New Ross is well marked both on charts and on the ground. The path of commercial ships in the estuary is therefore predictable and leisure craft should always have ample time to alter their course should this become necessary.
- 6.11 The potential for conflict is greatest in the case where organised events are to take place in the estuary. At such time a concentration of leisure craft may be following the same route and it is important that such routes avoid where possible the routes taken by commercial ships. For example, when regattas are taking place the course marking should be such that it keeps competitors clear of shipping routes.
- 6.12 There is no evidence of conflict at the present time and if common sense and awareness at sea is followed then the encouragement of greater leisure use of the estuary and river need not carry with it an unacceptable risk of collision.
- 6.13 Belfast Lough in Northern Ireland is a further example of leisure and commercial craft sharing a relatively narrow estuary. Bangor Marina (550 berths) Carrickfergus Marina (300 berths) and a number of yacht clubs are situated within Belfast Lough.
- 6.14 These marinas and yacht clubs generate considerable leisure boat activity on the Lough and yet there are few incidents of conflict with the Port of Belfast shipping. The Port generates 18,000 shipping movements annually and these take place in a well defined channel.

6.15 It is largely with the advent of the high-speed passenger ferries that some leisure craft have got into difficulty. Traditional sailing routes do cross the navigation channel but measures are normally put in place during major events and regattas to ensure that conflict does not arise.

6.16 Generally speaking, the narrow sections of Waterford Estuary and the river leading to Waterford City will be favoured by motor craft which are highly manoeuvrable and can take quick evasive action if required to do so. The downstream sections of river and the broader sections of the estuary will be more suited to sailing craft which are somewhat less manoeuvrable. It is expected there will be a natural gravitation of power boats to the Waterford City area and of sailing boats to the open areas of the estuary. This natural division will greatly reduce the likelihood of conflict between commercial and leisure craft.

7.4 Nearly half of those who responded (46%) indicated that they have had a berth in the marina since its opening in 1997 while only 12% started to use the marina in 2000. This indicates the popularity of the marina from the very beginning.



7. USERS VIEW OF WATERFORD MARINA

7.1 A postal questionnaire was distributed amongst the 81 people who rent berths in Waterford City Marina from Waterford Corporation. 50 questionnaires were returned (60% response rate) and the results of the questionnaire are analysed below (A copy of the questionnaire is attached in Appendix 4).

7.2 The respondents were asked to detail their occupation and all of those who returned the questionnaire answered this question. Nearly one-fifth of all berthholders are retired (18%). This is a possible explanation for the high level of usage of the marina as indicated in the response to question No. 7. 16% described themselves as company directors.

7.3 The majority of those questioned kept their boat at Waterford Marina (80%). A very small minority kept their boat between Waterford Marina and Dunmore East (12%). The remaining respondents kept their boats between the Waterford Marina and Newtown (2%), Dunmore East/Ballyhack (2%) and moorings on the River Barrow (2%).

7.5 Prior to the opening of the marina the majority of the boats were moored at Dunmore East (28%), while 10% kept their boat at home or the berth holders did not own a boat prior to them obtaining a berth at the marina (16%). Other places where boats were moored include Passage East, Cheekpoint, New Ross and Grannagh.

7.6 The majority of boats have between 2 to 3 crewmembers (66%) while 23% have between 3 to 5 crew. Only 11% boats indicate that they had a crew of greater than five.

7.7 Nearly three-quarters of those who responded (74%) indicated that they had been sailing for over 10 years while only 6% had taken up sailing in the last year. Despite the length of time that people had been sailing only half of those interviewed (58%) belonged to any boating or sailing club. The majority of those belonged to the Waterford Harbour Sailing Club (48%) and the Waterford Motor Yacht Club (24%).

Table 7.1 : Improvements which the visitors would like to see

Facility	Percentage
Showers / Toilets	52
Fuel Station	46
Dedicated Berth	22
More berths	6
Facility to lift boats out of the water	14
Improved security	12
Boat services / repairs	12
Full time caretaker	12
Clubhouse	8
Separate visitors berthing	6
Stopping off marinas in the estuary	6
Slipway	6
Facility for launching and recovering boats	2
Better organisation of allocation of berths	4
Storage facilities	4
Loading and unloading facilities	2
CCTV	2
Dry Dock	2
River front restaurant	2
Canteen / shop	2
Pump out facilities	2
Car park for marina users	18
Equipment and access	2
Rib	2
Hard standing area	

7.8 Only 10% rated the facilities at the Waterford Marina as poor while 48% rated them as 'good'. Although nearly 50% rated the facilities as 'good' all of the respondents stated that the facilities could be improved. The main facilities which the users would like to see are: toilets/showers; dedicated berths; fuel facility; improved security and a car park solely for marina users. Other improvements are listed in the table below.

7.9 In terms of maintenance the majority of those who returned the questionnaire maintained the boats themselves (32%). Of those who indicated that they used a boat yard, 16% got their boats repaired in Dunmore East while only 5% got their boat repaired in the City. The annual cost of maintaining the boats ranged from £175 to £5000.

8. SOCIO-ECONOMIC IMPACT OF WATERFORD MARINA

8.1 There are a number of different forms of leisure activity either directly or indirectly related to Waterford Marina. The economic impact of leisure activities has been measured in three main ways:

- * a questionnaire was distributed to the 81 berth holders in Waterford Marina to gauge the impact of resident permanent berth activity. Pertinent information gathered from this questionnaire included the berth holders’ normal place of residence, cost of marina berth fees, average number of days per annum in which boats were in use, average crew size per boat, annual cost of boat repair and maintenance, location of boat repair and maintenance services, and annual spend on other items while using Waterford Marina (e.g. food and drink, bed and board, sightseeing, shopping). Some 50 questionnaires were returned, from which grossed-up estimates for the total resident berth population have been derived;
- * Waterford Corporation has provided estimates for the annual number of visiting boats in Waterford Marina, based on visitor fee receipt books. Spend estimates for visitor activity have been derived from information available on marina charges at Waterford as well as information on associated spend from other marinas on the south coast (e.g. Kilmore Quay, Cork);
- * data on the number of visiting cruise liners and cruise liner passengers/crew were provided by the Port of Waterford and local ground handlers. Revenue estimates for this activity are derived from information available on the typical spend of cruise liner visitors to Irish ports.

8.2 In addition, a questionnaire was also distributed to relevant marine-related businesses in the

South-East, and to a number of tourism-related business in Waterford City, to assess the perceived impact of Waterford Marina among potential beneficiaries. A total of 25 questionnaires were distributed, with 10 replies received.

Permanent Berth Activity

- 8.3 There are 81 people presently licensed to keep boats at Waterford Marina. Crew sizes vary from a low of two (2) to a high of seven (7), with the average crew size at just over three (3.06). Some 250 people, therefore, regularly sail out of Waterford.
- 8.4 Boat usage also varies significantly. One respondent indicated that their boat was used for only 10 days during the year, while another indicated that their boat was used for 200 days of the year. On average, boats are used for about 45 days each year, which is probably above average compared to other marinas in Ireland. Total estimated boat days per annum at Waterford Marina, therefore, are close to 3,700.

Figure 8.1: Permanent Berth Activity at Waterford Marina

Number of berth holders	= 81
Average number of crew per boat	= 3.06
Number of users of permanent berths	= 248 (81 x 3.06)
Average number of days use per boat (per annum)	= 45.22
Total boat days per annum	= 3,663 (81 x 45.22)

Source: Berth Holders Survey
Note: Grossed-up estimates based on 48 responses received.

- 8.5 It is estimated that nearly £240,000 in annual spend is generated by berth holders while in Waterford Marina, or about £2,900 per boat. Nearly half of this spend (49%) is boat-related, either the cost of marina berth fees or boat repair and maintenance costs. The rest is made up of spending on food and drink, shopping and miscellaneous items, with very little spend devoted to sightseeing or visitor accommodation.

Table 8.2: Revenue Generated by Boats Berthed at Waterford Marina 2000

Type of Spend	TOTAL (£)
Marina berth fees	34,227
Boat repair/maintenance	82,674
Spend on other items:	
<i>Food and Drink</i>	61,345
<i>Shopping</i>	24,426
<i>Sightseeing</i>	1,640
<i>Bed and Board</i>	506
<i>Miscellaneous</i>	31,628
TOTAL	236,446

Source: Berth Holders Survey

Note: Grossed-up estimates based on 50 responses received. Not all respondents answered the question regarding spend on other items, so the sample size in this case is smaller (32).

- 8.6 Most of this expenditure (e.g. marina berth fees, spend on other items) is spent in the immediate Waterford area. Some of the spend on boat repair and maintenance, however, most likely accrues outside the Waterford area. Survey results suggest that about 70% of boats are repaired and maintained in the Waterford County/Estuary area, with the remaining 30% attributable to other areas, particularly further along the south coast towards Cork.
- 8.7 Estimates suggest that about half the boats in Waterford Marina (56%) were berthed on other parts of the Estuary prior to the opening of the marina (e.g. Dunmore East, New Ross, Cheekpoint, Passage East). About 1/4 were previously based outside the estuary, including boats from locations such as Cork, Kinsale and Youghal, as well as a number of boats from inland cruising locations along the River

Shannon. The remaining 20% are described as "new" boats, which suggests that the marina has stimulated some degree of additional participation in water-based leisure activities.

Visiting Boat Activity

- 8.8 Due to the timing of the study, it was not possible to survey visiting boats at Waterford Marina. Detailed data similar to that for permanent berth holders is therefore not available. However, Waterford Corporation has been able to provide estimates for the number of visiting boats at Waterford Marina during 2000. In the past year, 185 boats visited the marina, split roughly 50:50 between overseas and domestic boats. About 40% of boats arrived from Britain (mainly Wales), with 6-8% from mainland Europe and the remainder either domestic or Northern Ireland-based.
- 8.9 Visiting boats in 2000 were down by about 20% on 1999, when 232 boats visited Waterford Marina. This is partly explained by the more unsettled weather conditions that prevailed during 2000, particularly for mainland European boats.

Table 8.3: Visiting Boat Activity/Revenue at Waterford Marina 2000

	Overseas	Domestic	TOTAL
Direct Income:			
Number of visiting boats	92	93	185
Boat days per visit	<u>x 2.5</u>	<u>x 2.0</u>	
Total boat days	230	186	416
Average visitor berth fee (per day)*	x £11	x £11	x £11
Total visitor berth fees (£)	£2,530	£2,046	£4,576
Associated Income:			
Number of visiting boats	92	93	185
Average visitors per boat	<u>x 3</u>	<u>x 3</u>	<u>x 3</u>
Total visitors	276	279	555
Days per visit	<u>x 2.5</u>	<u>x 2.0</u>	
Total visitor days	690	558	1,248
Average daily spend (£)	<u>x £50</u>	<u>x £30</u>	
Total visitor spend	£34,500	£16,740	£51,240
Total Income (Direct + Associated):	£37,030	£18,786	£55,816

Source: Waterford Corporation/Consultants' Estimates

* Typical visiting boat size is either 25'-35' or 35'-45'. Boats in the former category are charged £10 per night, while boats in the latter are charged £12 per night. A figure of £11 per night is therefore used as an estimated average.

8.10 Visiting boats at Waterford Marina generated about £4,600 in marina berth fees in 2000. Over 55% of fees derived from overseas visitors, with the other 45% coming from domestic or Northern Ireland visitors. Additional to this, however, is the associated income generated by visitor spend on other items.

8.11 Assuming the average crew size is roughly similar to permanent resident boats (i.e. three), it is estimated that Waterford Marina attracted over 550 visitors in 2000. Discussions with the Corporation also suggest that the average

length of stay for visiting boats is quite high, with a majority of boats opting for the special "3-day rate" offered on marina berth fees¹⁰. The average length of stay for overseas visitors has therefore been projected at 2.5 days, with the average for domestic/Northern Ireland visitors slightly shorter (at 2.0 days)¹¹. In addition, it is projected that overseas visitors spend an average of £50 per day while in Waterford (on accommodation, food and drink, shopping, sightseeing etc), with domestic visitors spending about £30 per day. This is based on the evidence of other studies of sailing visitor spend on the Irish coast¹².

¹⁰ Data available for visiting boats in August and September 2000 (63 boats) shows that the average length of stay was 2.6 days.

¹¹ Given their greater familiarity with the coast and with the country generally, domestic visitors might be expected to spend less time in individual stop-off points.

¹² The 'Sailing in Ireland' profile prepared by Brandy Shipman Martin on behalf of the Irish Sailing Association noted that the approximate daily spend of out-of-state visitors to Ford cork Week was £60.

8.12 Using these figures, indicative spend estimates of £34,500 and £16,740 are derived for overseas and domestic visitors respectively. Total visitor income, therefore (including direct marina income and associated visitor income), is nearly £56,000, i.e. £37,000 overseas and £19,000 domestic.

Cruise Liner Activity

8.13 In 1999, 14 cruise ships visited Waterford Port. These ships carried over 5,100 passengers. Discussions with the Port of Waterford and with ground handlers for the cruise liners visiting Waterford suggest that about 65% of passengers disembark, meaning that over 3,300 passengers visit Waterford. Average length of stay was less than 24 hours, so cruise ship activity generated a total of at most 3,300 visitor days.

Figure 8.4: Cruise Liner Activity at Waterford Port 1999

Number of cruise ships visiting Waterford	=	14
Number of disembarking passengers on visiting cruise ships	=	3,316
Average length of stay	=	< 24 hours
Estimated average visitor spend*	=	£175
Estimated total visitor spend in Waterford	=	£580,300

Source: Port of Waterford/Ground Handlers / Consultants' Estimates

* There are no official estimates for average visitor spend of cruise ship passengers. Research carried out at UCC, however, found that cruise ship passengers in Cork are very high spend. Despite a typical length of stay of less than 24 hours (as in Waterford), passengers spent on average £193 during their stopover in Cork. Discussions with the Port of Waterford and with ground handlers for the cruise liners suggest that the average spend for visitors to Waterford would be similar.

8.14 There is no data available on the total spend attributable to cruise ship passengers while in Waterford. A study carried out into the cruise liner market at Cork, however, found that passengers spent on average £193 during their stopover, which again was less than 24 hours. Assuming a slightly lesser spend of £175 per passenger for Waterford, therefore, cruise ship passengers generate revenues of £580,000 for the local Waterford economy.

8.15 Further potential exists to attract additional business, not just through increased numbers of ships but also through existing ships (as 30%-40% of passengers on cruise ships choose not to disembark when docked in Waterford Estuary). It should also be noted that approximately 2,000 crew travelled on board cruise ships visiting Waterford. While their spend levels would most likely be far lower, they still make some contribution to the local economy.

Direct, Indirect and Induced Effects

8.16 Table 8.5 summarises the estimated socio-economic importance of Waterford Marina. Activities at the marina itself generate an estimated £290,000 in revenues in a single year. Only 13% (£39,000) is revenue directly attributable to the marina, with £250,000 generated in other businesses, mostly in the Waterford area. The cruise liner business generates an additional £580,000 in revenues for the local economy, ie nearly double the revenues attributable to the marina.

Table 8.5: Socio-economic Importance of Leisure Activity at Waterford Marina and Inner Port

Income Source (Direct and Associated)	Total Revenue (£)	GNP Multiplier	GNP Contribution (£)
Resident berths (domestic)	233,527	0.751	175,379
Resident berths (overseas)*	2,919	1.035	3,021
Overseas visitors	37,030	1.035	38,326
Domestic visitors	18,786	0.751	14,108
 Total Marina-related Income	 292,262	 -	 230,834
Cruise liner visitors (overseas)	580,300	1.035	600,611
TOTAL	872,562	-	831,445

Source: Various

* Of the 81 berth holders at Waterford Marina, one is overseas (Wales).

8.17 Gross National Product (GNP) multiplier estimates for overseas and domestic tourism/leisure activity can be used to assess the economic contribution of Waterford Marina to GNP, though the results must be treated as purely indicative since they are based on estimates of the national multiplier effect¹³. When multiplier estimates are applied, the marina contributes £230,000 to GNP, while the cruise liner business contributes £600,000. It is

also notable that the relative importance of overseas revenue increases when the multiplier effect is examined, as this revenue brings additional spend into the national economy (whereas domestic activity is a redistribution of existing monies).

8.18 In employment terms, it is estimated that activity at Waterford Marina sustains 11 full-time job equivalents (FTEs). The cruise liner

Table 8.6: Employment Effect of Leisure Activity at Waterford Marina and Inner Port

Income Source (Direct and Associated)	Total Revenue (£)	Employment Multiplier (Jobs) per £1m Spend	Employment (Jobs)
Resident berths (domestic)	233,527	36.31	8.48
Resident berths (overseas)*	2,919	50.67	0.15
Overseas visitors	37,030	50.67	1.88
Domestic visitors	18,786	36.31	0.68
 Total Marina-related Income	 292,262	 -	 11.19
Cruise liner visitors (overseas)	580,300	50.67	29.40
TOTAL	866,262	-	40.59

Source: Various

* Of the 81 berth holders at Waterford Marina, one is overseas (Wales).

¹³ GNP multiliers are used to measure the down-the-line effects of expenditure on the economy, e.g. the effect of distribution of expenditure from the consumer to a hotel, then on to the hotel's suppliers and beyond. There are no local multiplier estimates and use of national multiplier estimates for local level analysis must be treated as purely indicative. Local resident spend has been treated similarly to domestic visitor spend in this case as well, since there is no national multiplier available to gauge this activity.

business sustains an estimated additional 29 FTEs. Both of these estimates are also indicative, however, and subject to the same caveat regarding the use of national multiplier estimates.

Trade Perception of Waterford Marina

- 8.19 Respondents to the local trade questionnaire gave a mixed response on the impact that Waterford Marina currently has on their business. Some marine-related businesses, spanning Waterford, Wexford, Kilkenny and Tipperary, reported that the marina accounted for 2-10% of their total turnover. Others, however, even within 10-15 miles, reported that the marina had no impact on turnover. For leisure-related businesses, particularly on the Waterford quayside, respondents reported a small impact from activities on the marina, somewhere between 2-5%.
- 8.20 A significant majority of these respondents see potential for further business arising from Waterford Marina, particularly in terms of developing tourism activity. Local traders also highlighted the need for additional facilities, e.g. better on-shore facilities at the marina site - fuel, showers, toilets, etc.

9. SWOT Analysis

A SWOT analysis is a systematic means of assessing the strengths, weaknesses, opportunities and threats to an area or a proposal. The strengths and weaknesses are generally internal to the area, while the opportunities and threats are focused on external factors.

The following SWOT analysis provides a summary of the strengths, weaknesses, opportunities and threats facing both the Waterford City Marina and Waterford Estuary.

WATERFORD ESTUARY

<p>Principal Strengths</p> <ul style="list-style-type: none"> * Well established and growing tourism base for both domestic and foreign visitors * Strong tradition of maritime activity * Improving town and village environs * Presence of a major city within the estuary offering a range of services and facilities * Relatively unpolluted and under-developed environment * Interesting and varied landscape * Sheltered waters * Growing economy * Access from sea and from inland waterways 	<p>Principal Weaknesses</p> <ul style="list-style-type: none"> * General lack of formal planning mechanisms for spatial planning requirements of marine leisure * Navigation in the estuary is made difficult by tides and currents * Lack of other boating facilities and services within the estuary * Lack of club house/centre for marine activity * Distance from open sea
<p>Principal Opportunities</p> <ul style="list-style-type: none"> * Relative proximity to other marine centres (Crosshaven; Kilmore Quay; Wexford town) in context area * Increasing growth in leisure pursuits * Improved economic circumstances * Expansion of tourism in the area * Opportunities for private investment on back of marina facilities * Networking with other marinas * Development of marine status/image perhaps through annual event 	<p>Principal Threats</p> <ul style="list-style-type: none"> * Possible opposition to marina development amongst locals * Possibly high financial cost associated with providing additional facilities * Congestion on narrow waterway * Competition for funding

WATERFORD CITY MARINA

<p>Principal Strengths</p> <ul style="list-style-type: none"> * Location within a major city * Relatively cheap rents * Lack of alternative marinas within the Waterford County area * Improving City environment * Major tourist facilities located close to the city centre * Local Authority backing 	<p>Principal Weaknesses</p> <ul style="list-style-type: none"> * Marina is located a distance from the open sea * Lack of marketing of the marina * Lack of on-shore facilities usually associated with a marina development
<p>Principal Opportunities</p> <ul style="list-style-type: none"> * Increasing growth in leisure pursuits * Increasing affluence of the population * Relocation of port activities from the city will free up quays for redevelopment * Possibility of developing additional marinas within Waterford City (North Quays) and downstream 	<p>Principal Threats</p> <ul style="list-style-type: none"> * Potential conflict between local users of facilities and visiting sailors as the activity develops * Potential limits on capacity at existing marina

10. SUGGESTED VISION FOR THE DEVELOPMENT OF MARINE LEISURE IN WATERFORD ESTUARY

- 10.1 Based on the results of the berth holder questionnaire, consultations with the various local authorities, tourist organisations and business interests in the area it is apparent that there is demand for additional marine leisure related activities in Waterford Estuary. As stated earlier in the report there is a wealth of marine related activities currently operating in the estuary. However, the key facility that is lacking throughout the area and which is hampering further development of marine leisure activities is the lack of berthing facilities within the estuary.
- 10.2 The physical nature of the estuary suggests that it would be an ideal location for the development of a 'mini cruising ground'. In order to develop a mini cruising ground, berthing facilities would have to be available throughout the estuary which would allow boat owners to stop off at various points of interest. It is proposed that any such facility would be located in an existing town/village thereby allowing maximum use of existing infrastructure. The facilities provided would vary throughout the estuary based on the capacity of the town to absorb demand; technical constraints and the facilities available in the town. Berthing facilities would range from marinas to seasonal boarding pontoons. Depending on demand, these basic facilities can usually be adapted to accommodate the infrastructural needs of a wide range of allied marine leisure activities and services such as fishing, day boating, canoeing, diving, launch slipways, etc. It is important to emphasise that these public facilities would be accessible to all those interested in participating in marine leisure, subject, of course, to the requirements of public safety.
- 10.3 The attractiveness of the estuary as a mini cruising ground is based on a number of factors. The estuary is located on the south-east coast of Ireland between established sailing centres at Kilmore Quay and Crosshaven. The

development of additional berthing facilities in the estuary may attract visiting boats on route to their next port of call. It is also envisaged that the estuary would attract those sailors who prefer more sheltered waters than the open sea. The existence of a number of towns and major tourist attractions in the area may also encourage people to cruise the estuary providing them with the opportunity to stop-off at the various towns.

- 10.4 The location of Waterford City at the head of the estuary is the other key attraction of the area. It would appear, based on the patterns of visiting boats to the marina, that the City is a destination in its own right with visiting boats staying approximately 3 days on the marina. The provision of additional facilities within the estuary would provide the opportunity for visiting and local boats to cruise the estuary thereby spreading the economic benefit associated with the marina throughout the area.
- 10.5 The "mini cruising ground" would not only be expected to appeal to visitors, it would also be expected to act as a stimulus to development locally and to the intensification of local marine leisure activity, offering additional berthing options to local boat owners who presently maintain their boats elsewhere along the coast.
- 10.6 The suggested vision for the development of marine leisure activities in Waterford Estuary is based on the clustering of marine leisure activities within the estuary and the creation of a mini cruising ground. There are a number of different types of marine infrastructure that can be put in place in the study area. Locations for permanent marinas and berthing facilities have been selected on the infrastructure currently available in these locations. Where there are feasible proposals for marine facilities which are at an advanced stage these have been taken on board and incorporated into the study. This includes proposed facilities in Waterford City and also in Ballyhack.

The "mix" of facilities to be developed as part of the "mini cruising ground" would include provision of infrastructure and services

designed to encourage access to and enjoyment of the waterway. This would include such elements as slip-ways suitable for launching small craft (Trailer-sailors, canoes, dinghies, etc.), changing rooms, club houses, shoreline walks, restaurants and a full range of allied amenities and developments. The cruising ground might usefully be seen as a catalyst to stimulate interest in all categories of marine leisure activity in the estuary and not just cruising/ sailing.

- 10.7 Within the study area there are 3 locations that would be suitable for the development of marinas. These locations are Dunmore East, Waterford City and New Ross.

Dunmore East

- 10.8 Dunmore East's popularity as a destination for visiting yachtsmen has been hampered by the perceived opposition by fishermen to visiting yachts combined with a lack of proper berthing facilities. This has resulted in a fall-off in the number of visiting yachts to the harbour.
- 10.9 Proposals for the development of marinas in Dunmore East met with opposition from local residents and fishing interests in the past. A study has been prepared by KPMG for the Department of the Marine and Natural Resources on the infrastructure requirements of Dunmore East. The study recommends that additional quay side space be provided for fishing trawlers. If the necessary infrastructure is put in place to facilitate this it would also be possible to develop a marina. The report goes on to recommend that any marina development would be carried out by a private developer.
- 10.10 In line with the KPMG report this study also recommends the development of a marina at Dunmore East. A marina in this location would provide an ideal stop-off point for those cruising the lower reaches of the estuary and those making a passage along the coast. It is envisaged that the space in the marina would be split 50/50 between permanent berth holders and visiting boats.
- 10.11 The development of a marina at Dunmore East would not adversely affect the existing marina in Waterford City or any other proposed facilities in the estuary. A number of berth holders in Waterford City marina did indicate that they previously berthed their boat at Dunmore East and some of these may be expected to relocate to Dunmore East. However, it is envisaged that the majority of those who would take up a berth at any marina in Dunmore East would be those boats currently anchored in the harbour.

Waterford City

- 10.12 The existing marina in Waterford City is operating at capacity and while there is no waiting list for berths on the marina the pontoons that have been installed further upstream by the Port of Waterford have already attracted enquiries from boat owners. One of the main disadvantages of the existing marina is the lack of associated facilities. It may be possible to provide a floating facility that would accommodate services such as changing rooms, toilets, clubhouses and administration. It will be important to bear in mind that in order to promote Waterford as a key destination/venue for marine leisure and for visiting boats and sailors, a high standard of facility must be provided and maintained.
- 10.13 It is not considered appropriate that additional pontoons be placed between the existing marina and the pontoons put in place by the Port of Waterford. This is due to lack of landside space for access and for the provision of associated facilities. In order to attract more visiting boats to the City a high quality marina is required. The current facilities would not be sufficient to cope with the foreseeable demand if the marina was marketed abroad.
- 10.14 There are no suitable locations on the South Quays to facilitate such a development. The North Quays however would provide a suitable location. The North Quays are currently used by the Port of Waterford and also by some large fishing trawlers. However these users are likely to be vacating the North Quays within a number of years. The Port of Waterford are planning to relocate all the port traffic from

Waterford city to Belview Port while the proposed expansion of facilities in Kilmore Quay and in Dunmore East would be able to facilitate the trawlers currently using the North Quays.

- 10.15 Plans for the redevelopment of the North Quays have been prepared by the OPW. The proposals for this 12 acre site are for a mixed use development consisting of commercial uses/residential uses/hotel. A marina is proposed in conjunction with the hotel. This study would support the development of a marina on the North Quays.
- 10.16 The development of a marina in Waterford City would not detract from the existing marina and it is envisaged that a new marina would complement the existing one. Any marina on the North Quays would be undertaken by a private developer and would not be competing in the same market as the existing marina. Additional berths aimed at visitors would be necessary to attract more visiting boats to the area. The facility would also prove popular with those berth holders who require additional facilities to those currently on offer on the South Quays.

New Ross

- 10.17 New Ross is located on the River Barrow approximately 9 nautical miles upstream of Waterford City. There is a boat club in New Ross and also some port facilities. This report recommends the development of a marina facility at New Ross. This facility would initially cater for local users but with time it could become a destination for visiting boats.
- 10.18 The provision of a marina at this location would also add a further attraction to any cruising ground. A marina development at New Ross would give sailors the opportunity to cruise up river which is an opportunity not widely available. It would also enable those private boat owners who keep their boats on the River Barrow or on other inland waterways to access the estuary from the inland waterways. Currently such an opportunity would only be open to private boat owners as hire boats can not travel past St. Mullins due to insurance

restrictions.

- 10.19 Apart from the marina facilities proposed for Dunmore East, Waterford City and New Ross additional berthing facilities are required in the estuary to facilitate the development of a mini cruising ground. These facilities can be divided between permanent and seasonal facilities and will be available to all users.
- 10.20 Ballyhack and Carrick-on-Suir are suitable locations for permanent berthing facilities. This has already been established in Ballyhack by Wexford County Council who propose to develop a 20/25 berth pontoon facility which will be available to local fishermen and local/visiting yachts. The intended location for the pontoons is immediately south of the ferry slipway where there is deep water and minimum interference with the ferry.
- 10.21 There is an existing berthing facility at Carrick-on-Suir and this study recommends that this facility be improved and expanded as opposed to providing additional new facilities in the town. The existing pontoon appears to be popular with local boat owners. However in order to attract visiting boats some environmental improvements would be required in the vicinity of the pontoon. Currently the town turns its back on the river and the pontoon is flanked by undeveloped backlands of the properties on the main street. This area of the town could benefit from an urban design proposal which would incorporate the redevelopment of the existing facility. If the existing facility was improved, Carrick-on-Suir would attract visiting boats from Waterford City.
- 10.22 It is also recommended that seasonal berthing facilities be provided in the estuary at Duncannon, Arthurstown and Cheekpoint.
- 10.23 Duncannon is an ideal location for a pontoon facility - it is an established tourist town and has benefited from traffic calming measures which have improved the overall environment of the town. In order to access adequate water depths the pontoon would have to be located some distance from the existing pier which is

open to exposure and would necessitate the bringing ashore of the pontoons during the winter months.

- 10.24 The development of permanent facilities at Arthurstown may also be hampered by the mudflats designation as a shell fishing area, preventing the necessary dredging of the harbour that would be required for a permanent facility. A seasonal berthing facility could be provided off the north-west of the existing pier. The current level of residential development in the area may provide a resident population which would sustain such a facility.
- 10.25 Like Arthurstown, Cheekpoint also requires extensive dredging. A seasonal facility is proposed at this location as it is considered that the level of services available in the town are not sufficient to sustain a permanent facility.

APPENDIX 1

SOCIO-ECONOMIC PROFILE OF THE STUDY AREA

Table 1: Indicative Population in the Waterford Estuary Catchment Area (Cumulative Totals)

County	1-20 Miles			1-40 miles		
	1996	1991	% Growth	1996	1991	% Growth
Waterford	67,628	64,588	4.7	94,680	91,624	3.3
Wexford	19,642	19,466	0.9	87,881	86,220	1.9
Kilkenny	17,027	16,448	3.5	63,662	61,790	3.0
Tipperary (SR)	6,800	6,742	0.9	25,864	25,864	0.0
Carlow	-	-	-	14,206	14,052	1.1
TOTAL	111,097	107,244	3.6	287,207	279,550	2.7

Source: Derived from CSO Census of Population

Table 2: GVA Per Capita by County and Region 1995

County/Region	1995 (£)	South-East = 100	State = 100
Waterford	8,800	99.4	87.1
Wexford	6,000	94.9	83.1
Kilkenny	7,000	79.1	69.3
Tipperary (SR)	15,100	170.6	149.4
Carlow	8,400	67.8	59.4
SOUTH-EAST	8,850	100.0	87.6
Dublin	12,711		125.8
Mid-East	8,824		87.3
Mid-West	9,495		94.0
South-West	10,689		105.8
Border	7,934		78.5
West	7,291		72.1
Midlands	7,445		73.7
STATE	10,106		100.0

Source: CSO Regional Accounts 1991-1997

Note: Regional GVA data represent official CSO estimates. County data, on the other hand, are broad indicative measures compiled by the CSO but incorporating a considerable degree of estimation. This is because the underlying data are generally not sufficiently robust or are unavailable at individual county level.

Table 3: Total Income Per Capita by County and Region 1991-1997

County/Region	1997 (£)	Growth '91-'97 (%)	State = 100
Waterford	10,326	42.3	97.0
Wexford	8,777	47.9	82.5
Kilkenny	9,112	44.4	85.6
Tipperary (SR)	8,971	38.6	84.3
Carlow	9,114	38.6	85.6
SOUTH-EAST	9,289	43.0	87.3
Dublin	12,685	47.4	119.2
Mid-East	10,392	60.1	97.7
Mid-West	10,262	47.3	96.4
South-West	10,172	45.9	95.6
Border	9,458	49.2	88.9
West	9,458	51.1	88.9
Midlands	9,218	50.6	86.6
STATE	10,641	48.6	100.0

Source: CSO Household Incomes 1991-1997

Table 4: Disposable Income Per Capita by County and Region 1991-1997

County/Region	1997 (£)	Growth '91-'97 (%)	State = 100
Waterford	8,301	44.0	97.3
Wexford	7,319	46.0	85.8
Kilkenny	7,485	44.2	87.8
Tipperary (SR)	7,379	40.4	86.5
Carlow	7,535	40.0	88.4
SOUTH-EAST	7,623	43.5	89.4
Dublin	9,904	49.5	116.1
Mid-East	8,221	55.8	96.4
Mid-West	8,328	47.7	97.7
South-West	8,173	45.4	95.8
Border	7,748	47.5	90.9
West	7,845	47.6	92.0
Midlands	7,576	48.2	88.8
STATE	8,527	48.3	100.0

Source: CSO Household Incomes 1991-1997

Table 5: Labour Force and Employment Trends 1991-1996

County/Region	Labour Force Levels			Employment Levels		
	1996	96 v 91 (%)	Participation Rate (%)	1996	96 v 91 (%)	Unemployment Rate (%)
Waterford	39,391	+10.9	54.4	33,014	+13.6	16.2
Wexford	42,443	+10.5	54.1	35,321	+13.8	16.8
Kilkenny	30,897	+9.6	54.5	26,789	+11.9	13.3
Tipperary (SR)	30,471	+7.8	53.5	25,886	+11.8	15.0
Carlow	16,493	+7.8	52.6	13,608	+8.9	17.5
SOUTH-EAST	159,695	+9.6	54.0	134,618	+12.5	15.7
Dublin	484,079	+11.0	58.6	409,153	+14.2	15.5
Mid-East	146,322	+17.8	56.8	128,197	+22.4	12.4
Mid-West	131,109	+9.4	54.4	113,963	+13.2	13.1
South-West	223,153	+10.4	53.3	191,297	+12.1	14.3
Border	164,591	+8.8	53.7	136,761	+12.1	16.9
West	142,779	+10.7	53.3	122,639	+11.5	14.1
Midlands	82,236	+10.0	53.5	70,608	+12.0	14.1
STATE	1,533,964	+10.9	55.4	1,307,236	+13.8	14.8

Source: CSO Census of Population

Table 6: Labour Force and Employment Trends 1996-1999

Region	Labour Force Levels			Employment Levels		
	1999	99 v 96 (%)	Participation Rate (%)	1999	99 v 96 (%)	Unemployment Rate (%)
		(%)	Rate (%)			Rate (%)
South-East	172,400	+11.1	55.7	157,900	+16.3	8.4
Dublin	536,600	+13.4	61.7	511,200	+23.2	4.7
Mid-East	177,500	+19.1	61.7	170,000	+27.2	4.2
Mid-West	143,700	+15.0	56.9	136,500	+19.9	5.0
South-West	238,900	+8.6	55.1	225,500	+16.2	5.7
Border	171,300	+5.4	54.2	156,400	+13.3	8.7
West	161,300	+15.5	56.2	152,900	+23.7	5.1
Midlands	86,400	+4.6	54.0	80,800	+8.3	6.5
STATE	1,688,100	+12.0	57.9	1,591,200	+19.8	5.7

Source: CSO Quarterly National Household Survey/Labour Force Survey

Note: Based on the results available for the second quarter (March-May).

APPENDIX 2

TOURSIM PROFILE OF THE STUDY AREA

Table 1: Overseas Tourism Numbers in the South-East 1993, 1998, 1999 ('000s)

County	1999	1998	1993	Growth (%)	
				99 v 98	99 v 93
Waterford	315	336	243	-6.2	+29.6
Wexford	277	312	252	-11.2	+9.9
Kilkenny	218	228	130	-4.4	+67.7
Tipperary (South)	142	138	138	+2.9	+2.9
Carlow	42	41	28	+2.4	+50.0

Source: Bord Fáilte

Table 2: Overseas Tourists in the South-East by Source Market 1999

County	Total Visits (000s)	Market Composition (%)			
		Britain	Europe	North America	Other Areas
Waterford	315	42.5%	21.6%	30.5%	5.7%
Wexford	277	53.4%	27.4%	14.8%	4.3%
Kilkenny	218	38.5%	31.7%	24.3%	6.0%
Tipperary (South)	142	43.0%	29.6%	21.8%	5.6%
Carlow	42	61.9%	21.4%	9.5%	4.8%

Source: Bord Fáilte

Table 3: Overseas Tourism Revenue in the South-East 1993-1999 (£mn)

County	1999	1998	1993	Growth (%)	
				99 v 98	99 v 93
Wexford	33	38	24	-13.2	+37.5
Waterford	30	32	21	-6.2	+42.9
Kilkenny	28	30	13	-6.7	+115.4
Tipperary (South)	23	23	21	0.0	+9.5
Carlow	8	9	4	-11.1	+125.0
TOTAL	122	132	83	-7.6	+47.0

Source: Bord Fáilte

Table 4: Overseas Tourism Revenue in the South-East by Source Market 1999

County	Total Revenue (£mn)	Market (% Composition)			
		Britain	Europe	North America	Other Areas
Wexford	33	60.6%	18.2%	15.2%	3.0%
Waterford	30	50.0%	26.7%	23.3%	3.3%
Kilkenny	28	57.1%	21.4%	17.9%	3.6%
Tipperary (South)	23	56.5%	21.7%	17.4%	4.3%
Carlow	8	50.0%	25.0%	20.0%	5.0%

Source: Bord Fáilte

Table 5: Domestic/Northern Ireland Tourism Activity in the South-East 1993-1999

	1999	1998	1993	Growth (%)	
				99 v 98	99 v 93
Domestic					
Visitors (000s)	1,230	1,090	1,326	+12.8	-7.2
Revenue (£mn)	149.6	130.0	108.2	+15.1	+38.3
Northern Ireland					
Visitors (000s)	17	23	10	-26.1	+70.0
Revenue (£mn)	4.4	5.0	2.4	-12.0	+83.3

Source: Bord Fáilte

Table 6: Accommodation Supply (Rooms) in Waterford City and County

	Co. Waterford		Waterford City	
	Rooms	Growth v 1998 (%)	Rooms	Growth v 1998 (%)
Hotels	1,339	+25.6	834	+49.7
Guesthouse/B&Bs	759	+2.3	285	+15.4
Hostels	90	-8.2	64	-4.5
Self-catering	1,017	+48.7	115	+36.9
TOTAL	3,205	+23.7	1,298	+35.9

Source: Bord Fáilte

Table 7: Accommodation Supply (Rooms) in the Waterford Estuary Area 2000

	Total Stock	Hotel Room Stock	% of Total Stock
Waterford City	1,298	834	68.4
Dunmore East	403	48	21.2
New Ross	156	95	8.2
Arthurstown	17	-	0.9
Cheekpoint	14	-	0.7
Duncannon	8	-	0.4
Passage East	3	-	0.2
TOTAL	1,899	977	100.0

Source: Bord Fáilte

APPENDIX 3**COMMERCIAL SHIPPING ACTIVITY FROM THE PORT OF WATERFORD 1998-1999**

1998		No. of arrivals	Net Tonnage ('000s)	Gross Tonnage ('000s)	Deadweight Tonnage ('000s)	Goods received Tonnes	Goods forwarded Tonnes	Total Goods Tonnes
Trading Vessels	Total	849	1198	2915	3431	1065390	526959	1592349
	Ireland	71	101	243	287	63923	26348	90271
	UK	56	50	164	198	31962	5915	37876
	Other EU	497	701	1705	2008	447464	289827	737291
	Other countries	225	346	803	938	522041	204869	726910
Passengers Vehicles	Total	18	117	294	45	0	0	0
	Ireland	0	0	0	0			
	UK	0	0	0	0			
	Other EU	0	0	0	0			
	Other Countries	8	117	294	45			
	Total	867	1315	3209	3476	1065390	526959	1592349

1999		No. of arrivals	Net Tonnage ('000s)	Gross Tonnage ('000s)	Deadweight Tonnage ('000s)	Goods received Tonnes	Goods forwarded Tonnes	Total Goods Tonnes
Trading Vessels	Total	920	1433	3485	4102	1321707	582012	1903719
	Ireland	77	121	290	343	79302	29101	107923
	UK	61	60	196	237	39651	6532	45283
	Other EU	538	838	2039	2400	55117	320107	881462
	Other	244	414	960	1122	647636	226272	869051
	countries							
Passengers Vehicles	Total	15	97	245	38	0	0	0
	Ireland	0	0	0	0			
	UK	0	0	0	0			
	Other EU	0	0	0	0			
	Other							
	Countries	15	97	245	38			
	Total	935	1530	3730	4140	1321707	582012	1903719

APPENDIX 4

IMPACT OF WATERFORD MARINA - USERS QUESTIONNAIRE

Name:

Address:

Occupation:

1. Where are you normally resident?

2. Where is your boat normally based?

3. If your boat is normally based in Waterford please specify when you started using the marina
☐ 1997 ☐ 1998 ☐ 1999 ☐ 2000

4. If your boat is normally based in Waterford Marina please specify where the boat was berthed before the opening of Waterford Marina.

5. What type of craft do you own?
(LOA, Beam, draft, motor, motor sailer)

6. How many crew (including yourself) usually sail the boat
Number

7. Approximately how many days per annum would the boat be in use?

8. How many years have you been sailing / boating?
☐ Less than 1 year
☐ 1-5 years
☐ 5-10 years
☐ More than 10 years

9. Are you a member of any yacht/boat club or sailing organisation?

☐ Yes

☐ No

If yes please specify which club/organisation

10. How would you rate the facilities available at Waterford Marina?

☐ Poor

☐ Standard

☐ Good

☐ Excellent

11. Do you think the marina could benefit from the provision of additional facilities?

☐ Yes

☐ No

If yes, please specify.

12. Please indicate the cost of your marina berth (annual)

13. Please specify where you have your boat maintained and/or repaired.

14. Please indicate the approximate annual cost of maintaining the boat

15. Can you estimate how much is spent by yourself and your crew on the following items **while in Waterford Marina?**

Food and drink

Sightseeing

Bed and Board

Shopping

Miscellaneous

Thank you very much for taking the time to complete this questionnaire

