The Economic Impact of the Marine Leisure Industry on Cork Harbour 2017

This report provides information on the economic impact of the Marine Leisure Industry on Cork Harbour. The following are headline statistics detailed in the report.

**Headline Statistics**

- The estimated total value of the Marine Leisure Industry in 2016 is approximately €10.94 million.

- Cork Harbour has an annual resident capacity of 555 berths and 1035 moorings.

- The Marine Leisure Industry provides 29 direct jobs and 290 indirect jobs.

- Non-Cork Harbour residents contribute approximately €312,000 to the industry.
Acknowledgments

We are grateful for input from Dr Breda Kenny and Mr John McAleer of Cork Institute of Technology; Mr Gavin Deane of Royal Cork Yacht Club and the Port of Cork Company. Preliminary findings were presented to the Cool Route Partners in Cork, April 2017.

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Introduction

This report, commissioned by the Cool Route Project, presents the economic impact of the Marine Leisure Industry in Cork Harbour. The Cool Route Project, funded by Interreg VB\(^1\) funding, “investigates all aspects of the practical logistics and business potential to establish a bi-directional yacht cruising route along the western offshore areas of the Northern Periphery Area, stretching from Co. Cork in the South of Ireland, to the UK (Northern Ireland and Western Scotland) and onwards to the Faroe Islands and Norway” (Cool Route 2017). Led by the Cork Institute of Technology (CIT), the Project partners, also include the Royal Cork Yacht Club, Donegal County Council, Derry City & Strabane District Council, The Port authority of Torshavn (Faroe Islands) Glasgow Caledonian\(^2\) University, Blue Seas Marinas and the Western Norway Research Institute.

Based on definitions by Cork County Council (CCC, 2008) and Expert Group on Future Skills Needs study (EGFSN, 2015) and for the purpose of this report, we define the Marine Leisure Industry as:

- All leisure boating activity – capturing marine activity from the traditional residential and visiting yachting/cruising\(^3\) activities to the domestic/local dingy racing activities.
- Yachting (racing and cruising), dinghy sailing, kayaking, water skiing, diving, sea angling from boats, sailing, rowing boats and, cruising power boats, RIBs, or boats with in-board/outboard engines, whale/dolphin watching boat trips.

The overall aim of this evidence-based report is to capture the current (2016) economic impact of the Marine Leisure activity on the local economy using an economic multiplier for the Irish Marine Leisure Industry\(^4\).

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\(^1\) Interreg Europe helps regional and local governments across Europe to develop and deliver better policy. By creating an environment and opportunities for sharing solutions (Interreg, 2017).

\(^2\) For further details and full list of partners, see the Sail Cool Route website (Cool Route, 2017).

\(^3\) This does not include the cruise liner business.

\(^4\) Appendix 1 provides definitions used in this report.
The objectives of the study are:

- Provide an overview of the current Marine Leisure Industry in Cork Harbour.
- Establish the current berthing capacity (fixed berth and swing mooring) in Cork Harbour.
- Estimate the current economic impact in Cork Harbour.
- Establish a multiplier for the Irish Marine Leisure Industry.
- Highlight potential market opportunities and growth in Cork Harbour.

In order to achieve these objectives, the study employs the most up-to-date information available and robust analysis. Examples of this information include:

- Annual Direct Expenditure (Residents & Non-Residents of Cork Harbour).
- Total Output (Annual Residents & Non-Residents of Cork Harbour).

The study will also contribute to the wider tourism, marine and regional debates. More specifically, the adoption of an economic multiplier appropriate for the Irish Marine Leisure Industry. This will facilitate similar studies in Ireland and indeed along the Cool Route. It is, to the best of the authors’ knowledge, the first such report in an Irish context. Figure 1.1 provides a map of Cork Harbour and its location in the South West region of Ireland, the general area covered by this report.

Figure 1: Cork Harbour and its location in the South west region of Ireland
The remainder of this report is structured as follows:

- Section 2 provides an overview of the Marine Leisure Activity in Cork Harbour and Ireland.
- Section 3 estimates the economic impact of the Marine Leisure Industry in Cork Harbour.
- Section 4 provides a discussion and highlights potential market opportunities and growth in Cork Harbour.
- Section 5 concludes the report.
- The final sections provide a reference list and appendices.
Current Marine Leisure activity in Ireland and Cork Harbour
Current Marine Leisure activity in Ireland and Cork Harbour

The tourism industry is a key part of Ireland’s economic activity. Tourism and Travel is an important export for the Irish economy, it was worth €4.3 billion in 2015 (CSO, 2016). The industry employs 220,000 people across Ireland, and €1.25 billion generated in taxes for the Government in 2014 (ITIC, 2015). The importance and significant growth potential of marine tourism is acknowledge by Ireland’s national tourism development authority, Fáilte Ireland (Fáilte Ireland, 2013).

It is important to set this report in the context of the wider economy and the Marine Leisure Industry. The Irish economy has experienced a prolonged economic recession 2008-2013 with a current economic growth of 5.2% for 2016, from –4.0% in 2009 and unemployment at 6.8% in Quarter 2 2017, from a high of 15.1% in Quarter 3 2011 (CSO, 2017a; CSO, 2017b). The recession also had a significant effect on tourism. Overseas trips to Ireland decreased from 7.8 million in 2008 to 6 million in 2010 (a 23% decrease), while increasing again to 9.6 million in 2016 (CSO, 2017c). Figure 2.1 provides further information on overseas trips to Ireland, post financial crisis (2008).

![Figure 2: Overseas trips to Ireland: 2008 – 2016](image)

Source: Central Statics Office (CSO,2017c)
Furthermore, on a local level, Royal Cork Yacht Club, the oldest and largest leisure marine undertaking in the Cork Harbour area reported significant decline in annual subscriptions but have since recovered. Before the recession of 2008, annual subscriptions were approximately 2,250 and have since recovered to approximately 2,000 in 2016.

Located on the South-West coast of Ireland (see map in Figure 1.1 above) Cork Harbour has been the scene of many historic events throughout the centuries. The area is the home to the second city in Ireland and the location of many indigenous and foreign firms. Interestingly, the harbour is the second largest natural harbour in the world, after Sydney Harbour, Australia\(^5\). The Cork Harbour area is served by a network of roads, rail, air and sea transport. Motorway systems (M8) to Dublin, regional roads (e.g. N21 to Limerick and N25 to Waterford), Cork International Airport and ferry to Europe\(^6\).

The marine infrastructure in the Cork Harbour area include both leisure and commercial landing/harbour facilities. Commercial marine activity in the Cork Harbour accounts for approximately 10% of total commercial marine traffic arriving into Ireland (CSO, 2017d). In 2015, 1,174 vessels arrived into Cork Harbour, 90 of which were passenger vessels (CSO, 2017d). The Harbour will welcome, approximately 69 ocean liners in 2017, and expect over 90 liners in 2018. This luxury cruise liner business is worth approximately €12 million per annum to the local economy, with each passenger spending on average, €73 a day while onshore (English, 2017). In 2009, the total contribution of Port of Cork was estimated to be €286.7 million with approximately 1,849 FTE\(^7\) linked to these operations (Moloney, 2011). Marine related businesses in the Harbour area include, chandlers, boatyards, sail making facilities and boat sales (refer to Appendix 2 for details), as well as passenger boat/ferry\(^8\) services and cruise/sightseeing operators. However, the focus of the current report is the economic impact of the Marine Leisure Industry in Cork Harbour.

\(^5\) For further information on the rich history of Cork Harbour, the interested reader can refer to Discover Cork (2017).
\(^6\) Ferry from Cork to Roscoff, France
\(^7\) FTE – Full-Time Equivalent
\(^8\) Passenger boat/ferry to the inshore island of Spike, for example.
Table 2.1 presents details of the six main marinas in Cork Harbour, all of which are privately/club owned and operated.

<table>
<thead>
<tr>
<th>Marina</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Royal Cork Yacht Club</td>
<td>Based in Crosshaven, it is the world's oldest yacht club founded in 1720. The club organises the biennial Cork Week, widely regarded as Europe’s premier sailing event.</td>
</tr>
<tr>
<td>Cork City Marina – Port of Cork Company</td>
<td>Port provides and facilitates port activities and services including Roll-On Roll-Off, Lift-On Lift-Off, Bulks, Cruise, Pilotage, Channel Dredging and Land and Property Rental. Leisure activities: A total of 150 metres of berthage available primarily for day trips or short term stays in the City.</td>
</tr>
<tr>
<td>Cork Harbour Marina, Monkstown</td>
<td>Currently, a 90 berth facility, phase two will increase the marina's capacity to 280 berths. On site facilities include chandlery and Boat Repair Service.</td>
</tr>
<tr>
<td>Marnogue – East Ferry Marina</td>
<td>Lies on the east side of Great Island, one of three large islands in Cork Harbour (now joined by roads and bridges).</td>
</tr>
<tr>
<td>Salve Marine</td>
<td>At Crosshaven, it provides winter storage, marine engineering and repair services.</td>
</tr>
</tbody>
</table>

Table 1: Marinas in Cork Harbour

Source: Marina websites (see reference list for details)

Given that Cork Harbour is one of the key harbours on the island of Ireland and the location of the lead partner for the Cool Route Project, it is apt that an economic impact study of the area is conducted as a pilot study, with the potential to conduct similar studies along the route.
Methodology

This study incorporated both primary and secondary data collection methods. A number of key stakeholders in Cork Harbour were consulted including; Royal Cork Yacht Club, Port of Cork and previous studies were also examined. In order to estimate economic impact, this study employed the use of a multiplier. The multiplier refers to a final increase in income following an initial injection of spending in the economy. The current study employs a multiplier based on literature. Leddin and Walsh (2013) calculated a multiplier of 1.11 for the Irish economy and more specifically *Fáilte Ireland* established a multiplier of 1.60 for the Tourism Industry in Ireland (ITIC, 2015).

A Scottish study established the economic impact of the sailing tourism market in Scotland and they applied a multiplier of 1.68 (EKOS, 2016). The British Marine Federation (BMF) commissioned a study to generate the economic impact of United Kingdom (UK) boating tourism. BMF (2014) identified a multiplier of 1.60 for the recreational services sector, where marinas and moorings reside. There is no published multiplier for the Marine Leisure Industry in Ireland, therefore the current analysis apply a multiplier of 1.60, based on the BMF (2014) and the ITIC (2015) report use of *Fáilte Ireland*’s multiplier. A multiplier of 1.60 suggests for every €1 million of output/ expenditure generated by the Marine Leisure industry would raise National Income by €1.6 million. That is, a further €0.6 million of output is created in the remainder of the economy (Leddin & Walsh, 2013).
Economic Impact Analysis
Economic Impact Analysis

This section details the current economic impact of the Marine Leisure industry in Cork Harbour. It will establish the berthing and mooring capacity of Cork Harbour and the associated annual expenditure of Cork Harbour residents (vessel owners) and Non-Cork Harbour residents (visiting vessels) in 2016. Cork Harbour resident vessels include those who hold an annual berth or mooring. For the purposes of this report, Non-Cork Harbour resident vessels include any visitor vessel to Cork Harbour in 2016. The analysis also estimates the total value of the Marine Leisure industry in Cork Harbour and the associated employment. The employment levels will include both direct and indirect jobs.

Berths and Moorings Capacity

As alluded to in Section 2, Cork Harbour boasts six marinas that provide year round berthing facilities. These facilities include berths, which are broadly defined at a boat/vessel’s allotted place at a wharf or dock and moorings (swing), for boats alongside the shore or riverbank with one or more secured anchors with buoyed riding chain (EFB 2015)\(^9\).

Table 2 details the annual resident berths (available and occupied) in Cork Harbour. The occupancy berth rate is the number of occupied berths expressed as a proportion of the available capacity.

\(^9\) Refer to Appendix 1 for definitions.
Of the 555 berths available in 2016, 441 were occupied (79% occupancy rate). The Crosshaven area has the most concentrated berthing availability and currently comprises approximately 73% of available berths in Cork Harbour.

Table 3 specifies the annual resident moorings (available and occupied) in Cork Harbour. The occupancy mooring rate is the number of occupied moorings expressed as a proportion of the available capacity. Of the 1,035 moorings available in 2016, 1,000 were occupied (97% occupancy rate). Kopke et al. (2008) also found almost full mooring capacity and that moorings in Cork Harbour are left unused in only exceptional situations.

<table>
<thead>
<tr>
<th>Marina</th>
<th>Available Berths</th>
<th>Occupied Berths</th>
<th>Occupancy Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Royal Cork Yacht Club</td>
<td>220</td>
<td>215</td>
<td>0.98</td>
</tr>
<tr>
<td>Crosshaven Boat Yard</td>
<td>100</td>
<td>90</td>
<td>0.90</td>
</tr>
<tr>
<td>SalveMarine</td>
<td>65</td>
<td>56</td>
<td>0.86</td>
</tr>
<tr>
<td>Cork Harbour Marina Monkstown</td>
<td>90</td>
<td>40</td>
<td>0.44</td>
</tr>
<tr>
<td>Cork City¹⁰</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Marnogue (East Ferry)</td>
<td>80</td>
<td>40</td>
<td>0.50</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>555</strong></td>
<td><strong>441</strong></td>
<td><strong>0.79</strong></td>
</tr>
</tbody>
</table>

Table 2: Marinas in Cork Harbour
Source: Analysis of statics from stakeholders

Table 3: Annual Resident Moorings (available and occupied) for Cork Harbour 2016

<table>
<thead>
<tr>
<th>Available Moorings</th>
<th>Occupied Moorings</th>
<th>Occupancy Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1035</td>
<td>1000</td>
<td>97%</td>
</tr>
</tbody>
</table>

¹⁰ Cork City Marina have visitor berths up to a maximum of 6 nights and long term resident berths are not available.
Table 4 details the number and location of moorings as of January 2007 (Kopke et al., 2008). These figures have not changed between 2007 and 2016.11

<table>
<thead>
<tr>
<th>Marina</th>
<th>Available Moorings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crosshaven area</td>
<td>457</td>
</tr>
<tr>
<td>Monkstown</td>
<td>122</td>
</tr>
<tr>
<td>East Ferry area</td>
<td>107</td>
</tr>
<tr>
<td>Aghada</td>
<td>96</td>
</tr>
<tr>
<td>Passage</td>
<td>71</td>
</tr>
<tr>
<td>Whitepoint</td>
<td>57</td>
</tr>
<tr>
<td>Glenbrook</td>
<td>40</td>
</tr>
<tr>
<td>Carrigaloe</td>
<td>31</td>
</tr>
<tr>
<td>Blackrock</td>
<td>15</td>
</tr>
<tr>
<td>Cobh</td>
<td>12</td>
</tr>
<tr>
<td>Rushbrooke</td>
<td>11</td>
</tr>
<tr>
<td>Ballinacurra area</td>
<td>10</td>
</tr>
<tr>
<td>Ringaskiddy</td>
<td>6</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1035</strong></td>
</tr>
</tbody>
</table>

Table 4: Annual Resident Moorings (available) for Cork Harbour 2016

Source: (Kopke et al., 2008)

Similar to berths, moorings are concentrated in the Crosshaven area with 44% of Cork Harbour moorings located there.

**Annual Direct Expenditure and Total Output by Cork Harbour Residents**

Following classifications similar to those used in the recent *Sailing Tourism in Scotland* report (EKOS, 2016) this analysis estimates annual direct expenditure generated by Cork Harbour residents. Taking the resident berths and moorings as the starting point, the analysis estimated the direct expenditure and overall output for Cork Harbour residents using a multiplier.

Tables 2 and 3 establish the total number of occupied berths and moorings as 1,441 (1,000 moorings and 441 berths). To estimate the economic impact of these berths and moorings, it is necessary to establish the expenditure by the users. Direct

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11 Analysis of statistics from stakeholders
expenditure is calculated on two types of vessels, cruisers and day sailors/dinghies\(^\text{12}\). The Cool Route Traffic Study (2016) found cruising vessels within the Cool Route have an average standing cost of €6,800. This cost includes marina fees, insurance, repairs and maintenance, launching and storage fees. As the average boat size in Cork Harbour is smaller than the cruising vessel in the Cool Route Traffic Study, the current report employs a lower average standing cost (€4,500) for Cork Harbour. There are 400 day sailors/dinghies located in Cork harbour with an estimated annual expenditure of €400, resulting in total expenditure of €160,000.

\[
\text{Annual Direct Expenditure} = (€4,500 \times 1,441) + (€400 \times 400) = €6.64m
\]

The estimated annual direct expenditure by resident berths and moorings is €6,644,500.

This section establishes the current total output generated by Cork Harbour residents and the impact to its economy using a multiplier. As discussed in Section 2, this study employs a multiplier of 1.60 based on existing literature. This suggests that every €1 spent on Marine Leisure activities generates €0.60 of added value to the wider economy. This multiplier, of 1.60\(^\text{13}\), is applied to annual direct expenditure, as calculated above (€6.644m) to formulate the current total output.

\[
\text{Total Output} = \text{Multiplier} \times \text{Annual Direct Expenditure of Cork Harbour Residents}
\]

\[
1.60 \times €6.644m = €10,631,200
\]

The estimated annual total output from Cork Harbour residents of marine leisure activities is of the order of €10.631m.

\(^{12}\) Cruisers include sail and motor vessels, while day sailors/dinghies are small open boat for recreation or racing.

\(^{13}\) BMF Tourism (2014) identified a multiplier of 1.60 for the recreational services sector where marinas and moorings reside.
Annual Direct Expenditure and Total Output by Non-Cork Harbour Residents

This analysis estimated the number of visitors, their associated direct expenditure and the overall output for Non-Cork Harbour residents was estimated using a multiplier. Non-Cork Harbour residents include any visitor to Cork Harbour in 2016\textsuperscript{14}. This includes Irish visitors from outside Cork Harbour and foreign visitors to Cork Harbour in 2016. In 2016, 500 private leisure vessels visited Cork Harbour. 85\% (425) were Irish and UK visitors\textsuperscript{15} and the remaining 15\% (75) travelled from Europe, United States, New Zealand and Australia (Figure 3).

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{figure3.png}
\caption{Percentage of Visitors to Cork Harbour by Place of Origin}
\end{figure}

The Cool Route Traffic study (2016) found the average expenditure per visitor boat night is €130 (€50-€1,000 per night) with an average of three persons on board. On average, the minimum spend per night is €50 and the maximum spend per night is €1,000. The Cool Route Cruising Preferences Survey (2016) found on average, visitors spend three nights (1 night – 5 months) at a final destination. On average, the minimum stay is 1 night up to a maximum stay of 5 months in Cork Harbour.

\textsuperscript{14}Further disaggregation is not available.

\textsuperscript{15}While beyond the scope of this report, future potential travel issues arising from the exit of United Kingdom from the European Union is acknowledged.
Annual Direct Expenditure = (3 * €130) * 500 = €195,000

The estimated annual direct expenditure from non-Cork Harbour residents of Marine Leisure activities is €195,000\(^\text{16}\).

This section establishes the current total output generated by Non-Cork Harbour residents. The multiplier was used to estimate the indirect effects of the Marine Leisure industry to the local economy.

\[
Total\ Output = Multiplier \times Annual\ Direct\ Expenditure\ of\ Non\ Cork\ Harbour\ Residents
\]

\[
1.60 \times €195,000 = €312,000
\]

Therefore, the total current output generated by resident and non-resident vessels in Cork Harbour is an estimate of €10.94m.

\[
Total\ Output = Cork\ Harbour\ Residents\ Output + Non-Cork\ Harbour\ Residents\ Output
\]

\[
€10,631,200 + €312,000 = €10,943,200
\]

The employment generated by the industry is presented in the following section.

\(^{16}\) This may vary depending on the visitor spend and length of stay.
Cork Harbour Employment – Direct and Indirect

This section reports the jobs directly and indirectly (potentially) supported by the Marine Leisure Industry in Cork Harbour. 29 direct jobs (FTE) were supported by this industry in Cork Harbour in 2016. Direct employment include Marina engineers, Marina staff, General Manager, administrative staff and Boat Repairs staff.

\[
\text{Direct Employment} = 29
\]

British Marine Federation (2014) found that “for every job directly employed in the boating tourism sector, there are an additional 10 jobs supported in the wider economy through the direct and indirect effects of expenditures of boaters and boating tourism businesses”. Therefore, we estimate the indirect employment to be 290 jobs for Cork Harbour. Examples of indirect employment include bars, restaurants, tour operators etc.

\[
\text{Indirect Employment} = 29 \times 10 = 290
\]

In summary, Cork Harbour had 1,035 annual resident moorings and 441 resident berths in 2016. The direct expenditure generated by the Marine Leisure Industry in Cork Harbour is €6.64m (Cork Harbour Residents) and €195,000 (Non-Cork Harbour Residents). Based on a multiplier of 1.60 (BMF 2014), the Marine Leisure Industry in Cork Harbour is estimated to account for approximately €11 million of output for the year 2016. Of the €11 million, approximately €10.6m is total output by Cork Harbour residents and over €300,000 is total output by visitors to Cork Harbour. This equates to approximately €7,500 per annual resident berth. This industry is estimated to support 29 direct jobs and 290 indirect jobs.
Discussion and potential market opportunities/growth in Cork Harbour
Discussion and potential market opportunities/growth in Cork Harbour

This report studies the impact of the Marine Leisure Industry on the world’s second largest natural harbour, Cork Harbour. The Marine Leisure industry, includes all leisure boating activity – capturing marine activity from the traditional residential and visiting yachting/cruising activities to the domestic/local dingy racing activities (CCC, 2008; EGFSN, 2015). The report finds the number of available berths within Cork Harbour has increased to 555 in 2016 from 515 in 2009 (Port of Cork, 2009). Since 2008, Monkstown Marina was established and may explain the increase in berthing capacity. This report found the berthing occupancy rate for Cork Harbour in 2016 was 97%, this compares to approximately 80% in UK marines (BMF Marines 2014).

The total output generated by the Marine Leisure industry is €10.943 million. This is based on the number of occupied berths (441) and moorings (1000). If Cork Harbour was operating at full capacity, the number of available berths would be 555 and number of moorings would be 1035. Full capacity within Cork Harbour is likely to generate a further €1.073 million (approximately) per year. Taking account of the multiplier effect this will generate €7,200 per resident berth/mooring. If Cork Harbour was to attract an additional 100 visitor vessels per year, this would generate €62,400 (approximately), €390 per boat. This figure is based on a 3 night stay.

There is potential to grow berthing capacity and number of visiting boats in certain parts of Cork Harbour, evident in the planning application for additional berths at Cork City Marine Monkstown. Interestingly, Port of Cork (2009) identified that Cork Harbour had significant potential for further development growth, while Kopke et al., (2008) concluded the need for the development for more marinas and larger marinas within Cork Harbour. They found that Cork Harbour cannot accommodate an increase in moorings from its current capacity of 1035, our findings confirm this.

To further increase the impact of the Marine Leisure Industry, access to onshore facilities and activities is important. For example, access to car/cycle hire and/or public transport is likely to increase the length of stay by such visiting vessels, with the potential to spend more money in the locality.
While a possible limitation of this report (beyond the scope and definition of the Marine Leisure Industry), many 'non-boating' visitors contribute to the economy of the area. For example, the valuable impact of the many festivals and regattas enjoyed by land based spectators generates additional expenditure in the area. Activities such as RCYC’s Cork Week, Blackrock Race, Dragon Boat Challenge and Ocean to City Rowing race are economically valuable to the region\textsuperscript{17}. Open water swimming events are also a growing activity which attracts visitors and contributes to the local Cork Harbour area and beyond. This is a topic for further research and potential growth.

\textsuperscript{17} Other activities are listed in Appendix 3.
Conclusion

Commissioned by the Cool Route Project, this report provides information on the economic impact of the Marine Leisure Industry on Cork Harbour. The findings from the report are based on analysis of primary data collection from industry stakeholders and secondary data from Ireland’s Central Statistics Office and other research reports. The following are key findings from this analysis.

- The estimated total value of the Marine Leisure Industry in 2016 is approximately €10.94 million.
- Cork Harbour has an annual resident vessel capacity of 555 berths and 1035 moorings.
- The Marine Leisure Industry provides 29 direct jobs and supports 290 indirect jobs.
- Non-Cork Harbour resident vessels contribute approximately €312,000 to the industry.

In addition, the results suggest there is potential to grow berthing capacity and the number of visiting boats in certain parts of Cork Harbour leading to positive economic impact. For example, by attracting an additional 100 visitor vessels per year, could generate approximately €62,400 or €390 per boat. Furthermore, improving access to onshore facilities including transport is likely to increase the length of stay of these visiting vessels, with the potential to contribute to the economy of the area.

Acknowledging the limitations of the study, the findings indicate the importance of the Marine Leisure Industry on the economy of Cork Harbour area and the potential for growth.
References

- BMF Marines (2014) *British Marine Overview*, British Marine Federation, UK.
- CCC (2008) *A marine leisure Infrastructure strategy for the Western Division of Cork County Council*. Coastal and marine Resources Centre, University College Cork, Ireland.
- CSO (2017d) *Vessel Arrivals by Port, Type of Vessel, Year and Statistic* (TBA01). Central Statistics Office, Ireland.


• Interreg (2017) Interreg Europe, website [https://www.interregeurope.eu/](https://www.interregeurope.eu/)


*Note: All websites were last accessed June 2017.*
Appendices

Appendix 1

The following provides a list of definitions used in this report:

**Marina:** A facility for the berthing of pleasure craft providing direct walkway access to each boat, an adequate depth of water at all times, car parking, toilet facilities, services and other amenities.

**Swing Moorings:** Moorings for boats alongside the shore or riverbank within the main navigation channel or one or more secured anchors with buoyed riding chain or similar to which craft or pontoons may be secured.

**Berth:** A boat/vessel’s allotted place at a wharf or dock.

**Economic impact:** The total contribution of the marine leisure activity on the local Cork Harbour area.

**Multiplier:** Refers to a final increase in national income following an initial injection of spending in the economy.
Appendix 2

Example of marine related support facilities in the Cork Harbour area

<table>
<thead>
<tr>
<th>Marine Facilities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Castlepoint Boatyard</strong></td>
<td>Builders, repairs, GRP or Steel hulls fitted out, restorations, osmosis treatments, painting and winter storage.</td>
</tr>
<tr>
<td><strong>McWilliams Sailmakers</strong></td>
<td>World Class sail making and repairs.</td>
</tr>
</tbody>
</table>

*Chandlers:* Union Chandlery; Matthews Centre; CH Marine

Source: RCYC (2017)
Appendix 3

Example of events that took Place in Cork Harbour between 2011 and 2016

- ICRA National Championships 2011
- National 18 National Championships 2011
- 420 National Championships 2013
- Irish Sailing Association Youth Nationals 2013
- RS Southern Championships 2013
- Topper Munster Championships 2013
- Zeilrace Rally 2013 - Yacht Cruising Group from Holland
- Laser National Championships 2013
- Irish Cruising Club 85th Anniversary Rally 2014
- ISAF Women’s Worlds Match Racing Championships 2014
- Mirror Southern Championships 2014
- Optimist National Championships 2014
- SB 20 National Championships 2014
- National 18 Class National Championships 2015
- Topper Munster Championships 2015
- Irish Sailing Association Youth National Championships 2015
- Seafest 2015
- Cork Dinghy Fest 2015
- 1720 Sports Boat European Championships 2015
- All Ireland Helmsman’s Championships 2016
- Mirror European Championships 2016
- Optimist Munster Championships 2016
- Topper National Championships 2016
• IRC European Championships 2016
• Cork Harbour Festival 2015, 2016

Confirmed events for 2017 and proposed events up to 2020

• Cork Dinghy Fest 2017
• Laser National Championships 2017
• Irish Cruiser Racing Championships 2017
• Ocean to City Rowing Race 2017, 2018, 2019, 2020
• RCYC Autumn Series 2017, 2018, 2019, 2020
• GP14 Open & Youth Championships 2017
• Cork Harbour Festival 2017, 2018, 2019, 2020
• Cork Week 2018 & 2020
• 2020 – Tricentenary of the Royal Cork Yacht Club, the oldest Yacht Club in the world. This will include a Cork Week, Dinghy Events, a Superyacht Regatta, Cruising Boat Rally and many more events to be confirmed.
The Economic Impact of the Marine Leisure Industry on Cork Harbour 2017

June 2017