NUI Galway
OÉ Gaillimh

Whitaker Institute

A Survey Of Marine And Coastal Overseas Tourism Activity In Ireland

SEMRU
Socio-Economic Marine Research Unit

Authors

Stephen Hynes,

Murat Aymelek,

Rebecca Corless,

Natasha Evers

FOR FURTHER INFORMATION PLEASE CONTACT:

Dr. Stephen Hynes

Socio-Economic Marine Research Unit (SEMRU)

Whitaker Institute for Innovation and Societal Change,

National University of Ireland, Galway

Office: +353(0)91 493105

Email: stephen.hynes@nuigalway.ie

Web: http://www.nuigalway.ie/semru/

SEMRU

The Socio-Economic Marine Research Unit (SEMRU) within the Whitaker Institute of NUI Galway was established through the Beaufort Award in 2008 and since then has developed into the foremost marine economic analysis centre in Ireland. SEMRU was established with the objective of establishing marine socio-economic research capability in Ireland, centred on a research cluster in Galway led by NUI Galway and linking with the Marine Institute and Teagasc. The main research focus of the unit involves examining the economic utility of the marine environment (e.g. transportation, recreation) and the ecological value (e.g. fisheries, aquaculture) derived from the productivity of associated ecosystems.

Acknowledgments

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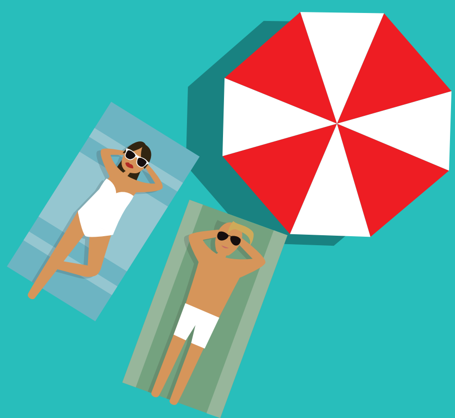


Executive Summary

SEMRU, at NUI Galway, carried out a survey of overseas visitors to Ireland as part of the Marine Institute's funded project "Valuing and understanding the dynamics of Ireland's Ocean Economy" (PBA/SE/16/01). The purpose of the survey was to estimate what proportion of their total holiday expenditure was in coastal areas (coastal tourism) and what proportion was on undertaking marine related activities (marine tourism). The survey, which consisted of face-to-face interviews with 620 overseas visitors, also solicited information on spatial distribution of their different marine related activities and associated expenditure.

THIS REPORT AIMS TO:

- Provide a profile of overseas tourists visiting the Republic of Ireland;
- Provide statistical information on participation rates amongst overseas tourists in 20 coastal and marine tourism and leisure activities;
- Examine the spatial distribution of overseas tourism participation in coastal and marine related activities;
- Provide estimates for overseas tourism expenditure per travelling group and per person;
- Estimate the contribution of coastal and marine based tourism to total overseas tourism revenue;
- Evaluate the level of satisfaction amongst overseas tourists with coastal and marine activity facilities.

For the purpose of this study, an overseas tourist is defined as someone who usually resides in another country and who is here on vacation as a holiday maker or visiting friends/family. Key international tourist markets for Ireland, including the UK, North America, Germany, France and Italy were represented in the sample. In a sample of 620, 338 individuals were found to have actively engaged in marine based activities during their stay. Under the heading of marine based activities, the study makes a distinction between land-based coastal leisure activities and water–based activities. The most popular land-based coastal activities amongst the sample was walking/running along the coast/beach/cliffs/etc., coastal sightseeing, beach or seaside trips and island trips. The most popular water based activities were sea swimming, sea angling and recreational boating of different types.

According to Fáilte Ireland statistics, there was an estimated 7.9 million overseas visitors to Ireland in 2018, who came as holiday makers or for the purpose of visiting friends/family.

Based on the results of the current survey, 76% of overseas visitors to Ireland in 2018 are estimated to have visited a coastal area (6.06 million persons) and 61% of them are estimated to have participated in a marine related activity (4.87 million persons). Rather than defining on a map what constituted a coastal area, respondents were told that coastal tourism refers to any tourism activity that takes place in a coastal city, town, village or rural area close to the sea. It was the respondents who then decided what proportion of their time and activities took place in such areas.

Overseas Tourism Market
(Holidaymakers or visiting family friends)

7,932,000 visitors
€4,513m

Coastal Overseas Tourism Market

6,060,000 visitors
€1,936m

Overseas Tourism participation in marine related activities

4,874,000 visitors
€650m

From an expenditure perspective, the contribution of international tourists to the Irish economy is considered to be very significant, particularly to the counties located on the West Coast of Ireland. The average total expenditure per travelling party of overseas visitors in the sample was €1,630 with the average trip lasting 7 days. Of this, an estimated €699 was spent in coastal areas. The estimated total expenditure per person was €569. The estimated coastal area expenditure per person was estimated to be €244, while the estimated marine related activity expenditure per person was estimated to be €82 with only an average of €25 per person being spent on on-water activities. Those individuals in the sample who actively engaged in marine based activities during their stay had a statistically significant higher total expenditure per trip (€710) than the total sample. They also stay on average 1.32 days more per trip compared to the average respondent in the sample.

Total coastal spending by overseas tourists was estimated to be €1.94 billion, which represents approximately 40% of the total expenditure by overseas tourists visiting Ireland. Moreover, approximately one third of the coastal related spending was on marine related activity. The marine related activity expenditure, or what might truly be referred to as marine tourism, is estimated to generate revenue of €650 million with €198 million being spent on water specific activities. Fáilte Ireland estimate that €5.209 billion in revenue was generated from all categories of overseas tourists in 2018. Marine tourism therefore makes up an estimated 12% of total overseas tourism expenditure.

The analysis presented in the report on the overseas coastal and marine tourist market should provide useful information to relevant stakeholders and policy makers and allow them to gain a better understanding of the spatial distribution and growth potential of the market. The results could also be useful in terms of feeding into the National Maritime Spatial Planning Framework that is currently under development and for determining a sustainable long-term strategy for marine tourism, more generally.

01
Introduction

One of the key industries contributing to Ireland's ocean and coastal economy is marine and coastal tourism. While a number of studies have previously examined coastal tourism activity, only limited work has been done on quantifying marine tourism activity in Ireland. An example of previous research on Ireland's marine tourism market was an audit of water based tourism and leisure activity products commissioned by the Marine Institute (MI) (MI, 2006[1]).

This involved a systematic assessment of the quantity and quality of Ireland's water based tourism and leisure products and attempted to identify product gaps and opportunities at local, regional and national levels, with a view to informing policy and investment decisions. The audit did not, however, assess the overall value of the sector. In 2003, the MI published the results of a national survey of marine leisure activities carried out by the Economic and Social Research Institute (ESRI,) with estimates of expenditure by domestic residents (MI, 2004[2]). Elsewhere, Fáilte Ireland (FI), the National Tourism Development Authority, regularly produce estimates of the number and expenditure of overseas visitors engaged in 'watersports' activities. More broadly FI have tended to use 10% as the share of marine tourism in general tourism output.

As part of the regular ocean economy reporting for Ireland, SEMRU regularly produces turnover, gross value added and employment figures for what they define as "tourism and leisure in marine and coastal areas"[3] in Ireland[4]. DG Marine Affairs also provides estimates for coastal and marine tourism in all EU coastal member states, including Ireland, using a similar approach to SEMRU. The definition used by DG Marine Affairs is much broader, however, and, as well as the accommodation and leisure sectors, includes output from retail sales in specialised stores, air and water transport and food and beverage services[5].

[1] Marine Institute (2006). Water based Tourism and Leisure Product Audit. Marine Institute Publication, Galway.

[2] Marine Institute (2004). A national survey of water based leisure activities in Ireland 2003. Marine Institute Publication, Dublin.

[3] SEMRU (2019). Ireland's Ocean Economy, SEMRU publication, NUI Galway.

[4] SEMRU's estimates are based on proxies that provide an assessment of the share of coastal and marine tourism in total tourism. Using these proxies, the coastal and marine share in total output values for tourism and leisure in Ireland, as provided by the CSO (Central Statistics Office), can be estimated. A full description of the methodology used in SEMRU's ocean economy reports to estimate "Tourism and Leisure in Marine and Coastal Areas" is available in the appendix of the most recent report as referenced in footnote 3.

[5] European Commission (2019). The EU Blue Economy Report. 2019. Publications Office of the European Union. Luxembourg.

Within this report, overseas coastal and marine tourism expenditure is estimated using the results of a survey of overseas visitors to Ireland. The survey instrument was developed by SEMRU following best practice and a survey company, RedC, was employed to collect the data from international tourists holidaying in the Republic of Ireland. This report adds to the body of work described above by examining the spatial distribution of overseas tourists' marine activity in Ireland and by estimating the contribution of the 'marine' to total overseas tourism expenditure. Furthermore, we make the distinction between coastal and marine tourism. For the purpose of this report, and in the survey instrument presented to tourists, coastal tourism, marine related activities tourism and water based activity tourism were defined as follows:

COASTAL TOURISM

refers to any tourism activity that takes place in a coastal city, town, village or rural area close to the sea.

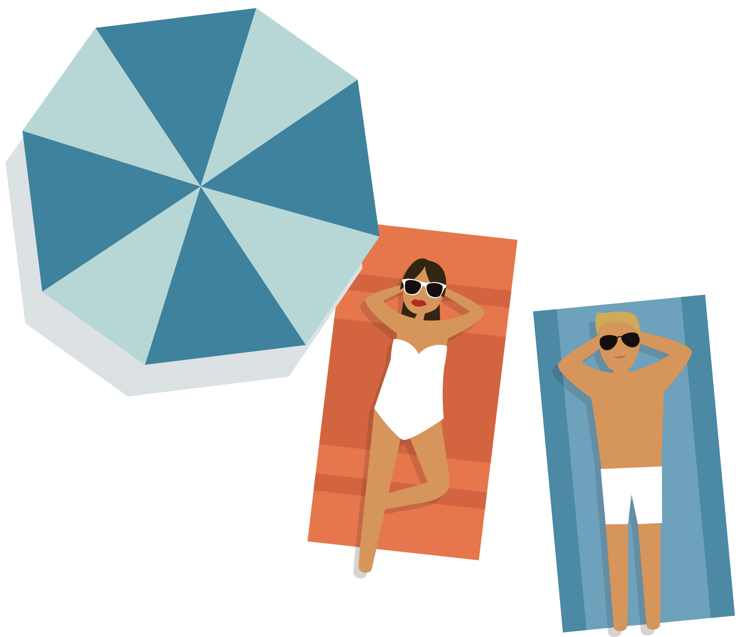
MARINE TOURISM

refers to sea-based activities such as swimming, surfing, boating, yachting, cruising, sea kayaking, diving and other nautical sports, as well as land-based activities, including beach activities, sun bathing, marine related sight-seeing and other coastal recreation activities taking place on the coast for which proximity to the sea is a necessity.

WATER BASED ACTIVITY TOURISM

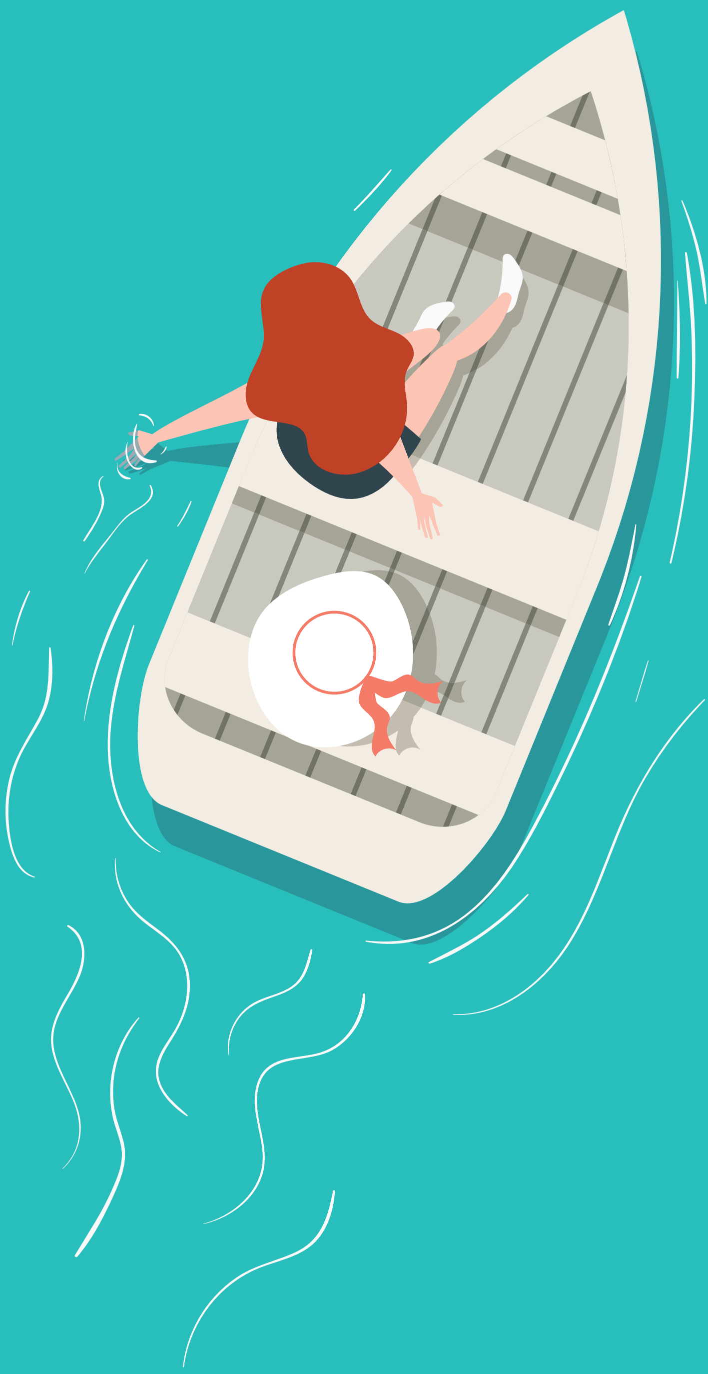
refers specifically to sea-based activities where there is direct contact between the participant and the water.

The report is laid out as follows: A background summary regarding the coastal and marine tourism sector in Ireland is presented in Section 2; the study methodology, the questionnaire design, data collection and the analysis process are outlined and reviewed in Section 3; the results of the survey are presented and analysed in Section 4; and some limitations of the survey, policy recommendations and final conclusions are set out in Section 5.



7,932,000 overseas tourists came to Ireland in 2018 as holidaymakers or to visit family and friends

02
Tourism in Ireland



Tourism is an important economic activity in Ireland, but even more so for the large number of coastal regions and offshore inhabited islands on the west coast. Recent FI figures[6] demonstrate the importance of overseas tourism to the Irish Economy:

- 9.6 million overseas tourists (including those here for business trips) visited Ireland in 2018, representing a growth of 6% on 2017;
- Overseas tourism expenditure also grew by an estimated 6% to €5,209 million;
- Every €1 million of tourist expenditure helps to support 27 tourism jobs;
- 1,000 additional overseas tourists supports 20 jobs in the tourism industry.

Total international visitors to Ireland reached 9.6 million in 2018. There has been steady growth in overseas visitors since 2011 (Table 1 and Figure 1). FI preliminary figures for 2018 also suggest that mainland Europe replaced Britain, for the first time, as Ireland's biggest source market for overseas tourists, representing 37% of all such visits (compared to 36% for Britain). The next biggest source market was North America (18%).

Table 1. Overseas Tourist Statistics 2012-2017

Tourism	2012	2013	2014	2015	2016	2017	2018*
Total Overseas tourists (000s)	6,286	6,686	7,105	8,036	8,742	9,023	9,580
Angling (all types) Participants (000s)	118	127	157	163	131	-	-
Water Based Activities** (000s)	97	110	158	129	196	-	-
Total Overseas Expenditure (€m)	2,956	3,316	3,596	4,265	4,638	4,924	5,209
Average Expenditure per Person (€)	470	496	506	531	531	545	544
Average Overseas 'holidaymakers' Expenditure per day (€)	77	82	83	89	89	91	-

(Source: FI statistics, various years), * Figures for 2018 are preliminary. **Excludes swimming, sailing and angling.

Holidaymakers and those classified as visiting family/friends in the definition of overseas tourists visiting Ireland in 2018, equates to approximately 7.93 million persons in total (The remainder (1.6m) are classified as 'Business' and 'Other' by FI). The tourism sector in Ireland generates approximately 140,000 jobs in the accommodation and food sector, and overall employment in total tourism is estimated to be in the region of 240,000[7].

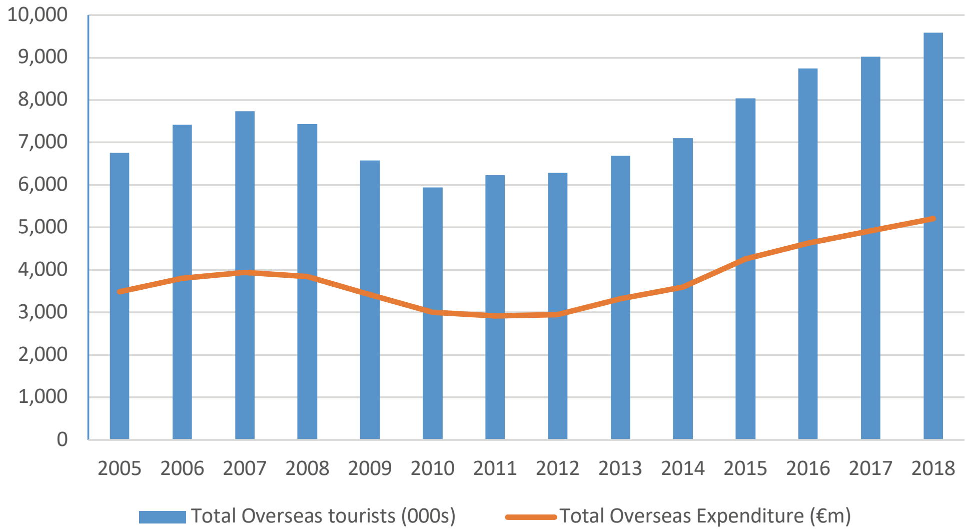
Tourism and leisure in coastal and marine areas of Ireland are a significant component of the overall tourism market. According to SEMRU's latest Ocean Economy report, tourism and leisure in marine and coastal areas generated the highest employment numbers in Ireland's ocean economy (just over 50% of all ocean economy employment). The report highlights that following the drop in tourism activity during the great recession, which followed the financial crash of 2007, the industry has been on a reasonably steady growth path since 2012. The turnover generated by coastal and marine tourism in 2016 (figures generated from CSO data by SEMRU) was €1,078 million, while gross value

[6] Fáilte Ireland (2019). Tourism Facts 2018 Preliminary. http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/Publications/Preliminary-Tourism-Facts-2018.pdf?ext=.pdf

[7] Irish Tourism Industry Confederation (2018). Tourism. An Industry Strategy for Growth to 2025. ITIC Publication

added (GVA) was €558 million and the sector employed approximately 16,000 full time equivalent individuals. Estimated SEMRU figures for 2018 suggest that turnover, GVA and employment have all increased in line with FI's observed growth in tourism numbers for this period. Turnover from the sector is estimated to have reached €1.25 billion in 2018.

Figure 1. Total Overseas Visitors and Total Overseas Expenditure



(Source: Fáilte Ireland statistics, various years. Includes all overseas tourists; holiday makers, visiting friend/family, business and Other)

The potential for coastal and marine tourism in Ireland to develop new niche marine environment related tourism products is substantial, especially given Ireland's world-renowned landscapes along 7700km of coastline and access to marine waters that span approximately 900,000km^2. Water based tourism activities including sea angling, surfing, windsurfing, kite surfing, sailing, sea kayaking and coasteering are all increasing in popularity. While figures on the numbers of overseas tourists engaging in water based activities are difficult to obtain, the Government's recent National Marine Planning Framework Baseline Report[8] provided an overview of the numbers of overseas tourists engaging in angling and other water based activities in recent years. The number of overseas tourists engaging in water based activities has more than doubled from 97,000 in 2012 to 196,000 in 2016 (Table 1). The Government's report also suggests that an additional 40,000 overseas tourists per annum engage in sailing activities.

Elsewhere, a 2013 FI market research report[9] estimated that, in 2011, 86,000 overseas visitors engaged in water sports (other than swimming, sailing and angling) in Ireland, spending approximately €65m. Based on the results of their survey, surfing was the most popular activity followed by canoeing. Diving and windsurfing were also mentioned "but only by a very small

[8] https://www.housing.gov.ie/sites/default/files/publications/files/national_marine_planning_framework_baseline_report.pdf
[9] Fáilte Ireland (2013). Watersports – Market Research 2013. Fáilte Ireland Publication, Dublin
[10] Inland Fisheries Ireland (2015). The Economic Contribution of Bass and Sea Angling in Ireland, IFI publication, Dublin.

percentage" of tourists. Sea anglers are one of the key marine recreation user groups in Ireland. Within Ireland, an estimated 127,000 people go sea angling every year[10] and a number of studies have been undertaken to estimate the value of this important marine leisure segment in Ireland[11]. The study by Hynes et al. (2017) suggests that sea anglers in Ireland receive benefit (consumer surplus) from sea angling excursions well in excess of the travel costs of their trips.

While not a segment of the marine tourism market directly examined in this report, cruise tourism traffic in Irish ports has also increased considerably in recent years and Ireland is becoming more important as a global cruise destination. Figures from the Irish Maritime Development Office (IMDO) indicate that in 2018, 301 cruise ships berthed at Irish ports, which represented a 30% increase on the previous year. Figures from SEMRU's Irelands Ocean Economy report suggest that the total expenditure by disembarking cruise passengers in Ireland was estimated at €51.4 million in 2018, indicating a 40% increase, in comparison to 2017.

Various factors have contributed to the development of the marine and coastal tourism in Ireland: initiatives such as the Wild Atlantic Way (WAW)[12], policy focus on the sector through the EU Blue Growth Strategy, the integrated marine strategy for Ireland – Harnessing our Ocean Wealth (HOOW) and funding through the EU Maritime and Fisheries Fund (EMFF). FI's WAW brand was designed to highlight and leverage Ireland's unique geographical position along the Atlantic Ocean and has been very successful in this regard. As pointed out by the Department of Housing, Planning and Local Government (DHPLG)[13], "by allowing tourists engage with and understand how the sea shaped our coastal communities, our lifestyle and our traditions, its key goal is to entice even more visitors to Ireland's shores and, most importantly, to give them a reason to stay longer and spend more".

Given its potential for further growth, coastal and marine tourism in Ireland deserves further research attention and policy focus. Whilst all visits in coastal areas are considered coastal tourism, marine related activities of coastal tourists are considered marine tourism. Few if any studies either nationally or internationally make the distinction, in the statistics that are produced, between marine and coastal tourism. This report aims to fill that gap in the analysis for Ireland, by generating estimates for overseas coastal tourism, marine tourism and water based tourism expenditures.

[10] Inland Fisheries Ireland (2015). The Economic Contribution of Bass and Sea Angling in Ireland, IFI publication, Dublin.

[11] Tourism Development International (2013). Socio-Economic Study of Recreational Angling in Ireland. Inland Fisheries Ireland Report, Dublin and Hynes, S., Gaeven, R. and O'Reilly, P. (2017). Estimating a Total Demand Function for Sea Angling Pursuits. Ecological Economics, 134, 73–81.

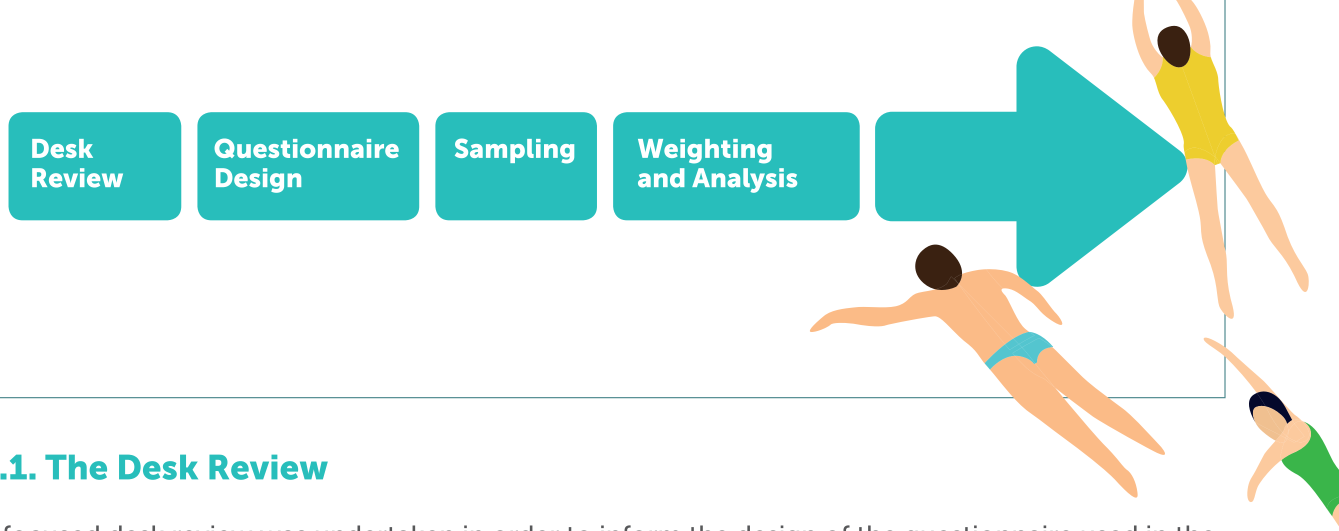
[12] The Wild Atlantic Way stretches from Malin Head in Donegal to Kinsale in Co. Cork and is the largest defined coastal touring route in the world.

[13] DHPLG (2019). National Marine Planning Framework Baseline Report. Government of Ireland Publication, Dublin.

03
Methodology

The survey methodology was shaped with the objective of recording participants' perceptions, preferences and experiences, and determining their expenditure on leisure and tourism activities in the marine and coastal areas of Ireland. A comprehensive survey questionnaire was developed and data was collected using face-to-face interviews with randomly selected international tourists. The sample consisted of 620 participants and each survey involved interviews of approximately 10 minutes duration. The results of the survey provides an insight into international visitor's coastal and marine related tourism experiences in Ireland. The stepwise methodology of this report is presented in Figure 2. Each of these stages includes different processes aimed at achieving a systematic workflow towards obtaining meaningful results.

Figure 2. Stepwise methodology



3.1. The Desk Review

A focused desk review was undertaken in order to inform the design of the questionnaire used in the survey, the categories of marine and coastal activities to include and to assist in determining the best approach to collecting the responses from the overseas visitors. The desk review found a number of previous studies that carried out surveys of domestic residents, who participated in marine and coastal leisure activities in Ireland. However, none provided significant detail in relation to the participation and expenditure by overseas visitors on a range of coastal and marine activities.

Previous domestic residents' marine activities surveys were useful in assisting with defining the marine leisure activity classifications to use. The ESRI carried out two such surveys of domestic marine activity participation rates in 1996[14] and 2003[15]. A more recent survey by SEMRU of the Irish population's participation in coastal and marine based recreational activities was carried out in 2012[16]. The sample size of 812 in that report was representative of the Irish population aged 18 and over and stratified according to gender, age and working status. The 2015 Scottish Marine Recreation

[14] Whelan, B., 1997. A National Survey of Water-Based Leisure Activities: Report carried out by the Economic and Social Research Institute on behalf of the Marine Institute

[15] Williams, J. and Ryan, B., 2004. A National Survey of Water-Based Leisure Activities in Ireland 2003, Marine Institute [Available online: http://hdl.handle.net/10793/551]

[16] Norton, D., Hynes, S. and Boyd, J. (2018). Valuing Ireland's Blue Ecosystem Services, [non-technical version] SEMRU Report Series, available to download: http://www.nuigalway.ie/media/researchsites/semru/files/marine_ecosystem_service_non_technical_report_final.pdf

and Tourism Survey Report was also consulted and provided further guidance in terms of survey design. The annual reports from FI of general overseas tourism numbers were also used to determine needed quotas for representativeness of key nationalities in the sampling process.

The desk review highlighted the absence of detailed information on overseas visitors' coastal and marine activity participation, not just in Ireland but elsewhere. What little data is available is also at a national level and under broad headings such as 'waters related activities' and 'angling'. The spatial breakdown of marine tourism activity is also lacking in the literature. This is an important consideration for Ireland given that it is presently developing its National Maritime Spatial Plan. Therefore, to assist in this planning process, it was considered necessary to include questions relating to geographic location (county level) where overseas tourists had undertaken or planned to undertake coastal and marine activities on their current trip.

3.2. The Questionnaire Design

The purpose of the survey was to investigate the market for coastal and marine-based tourism and leisure in Ireland. The questionnaire was divided into four different sections:

- **Screening:** In this section, data regarding nationality, trip purpose, gender and age of participants was collected. These questions allowed the survey company to ensure that certain quotas for key international groupings were met. In particular minimum quotas for country of residence were required for key tourist markets: UK, North America, Germany and France, to reflect Central statistics Office (CSO) aggregate visitation estimates. Other nationalities were also included in the sample.

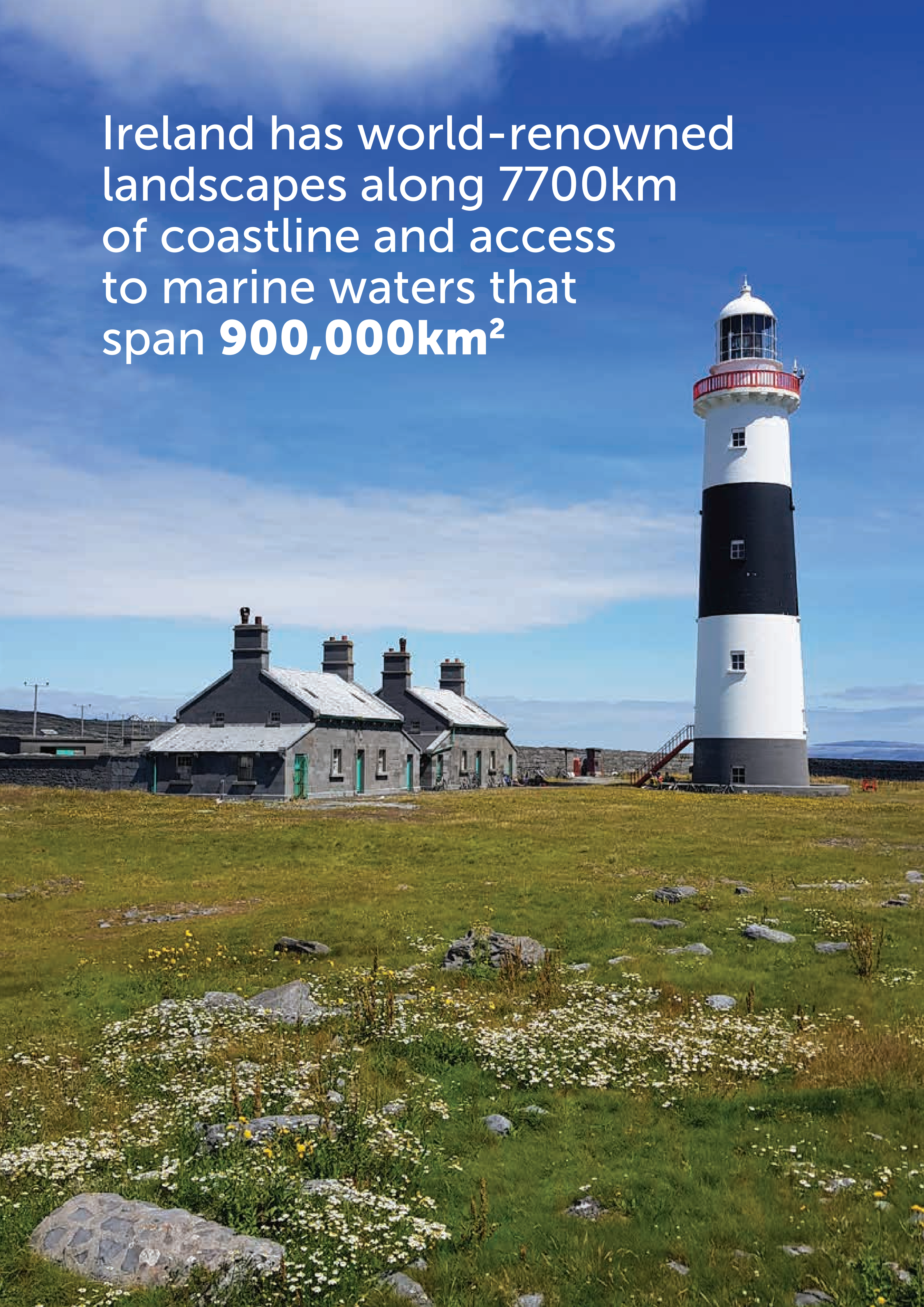
- **General tourism and leisure questions:** This section of the survey was aimed at collecting data on the travelling groups' composition, trip profile and their general spending pattern. How long tourists were spending in coastal areas was also to be recorded together with their awareness of the WAW and its contribution to their trip plans.

- **Coastal and marine based activities:** This section was aimed at determining participants' engagement with a range of coastal and marine based activities, the share of total expenditure on these activities and the counties in which they were pursued. It also aimed to solicit the respondent's level of satisfaction with the facilities for each activity in which they participated.

- **Demographic Background information:** Finally, some other important demographic data on respondents such as working status, income levels, marital status, etc. was collected.

The questionnaire was tested with two groups of overseas tourists visiting the Galway area and further discussions with the survey company, RedC, led to some final refinements of the survey instrument. The final survey instrument employed can be downloaded from
http://www.nuigalway.ie/media/researchsites/semru/overseas_marine_tourist_questionnaire.pdf

Ireland has world-renowned landscapes along 7700km of coastline and access to marine waters that span **900,000km²**



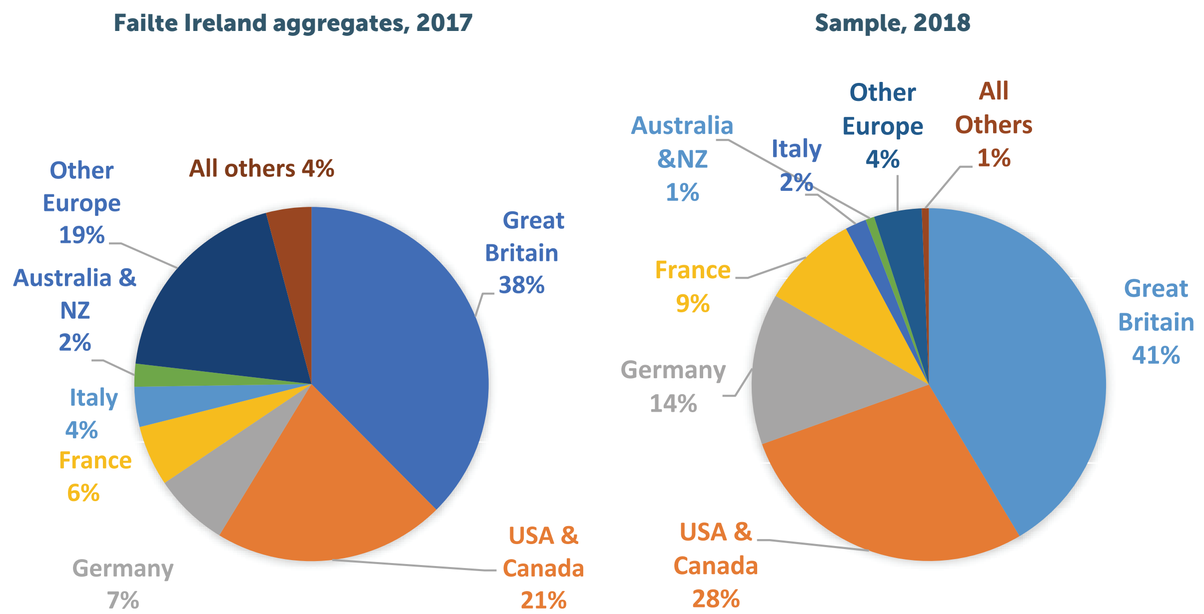
3.3. Sampling

In total, 620 intercept face-to-face interviews were conducted with foreign tourists in four major tourism areas across Ireland during the months of August and September 2018. Of these, 309 interviews were conducted in Dublin (College Green/Grafton Street area (141) and Temple Bar Area (168)), 143 of the interviews were conducted in Galway and 168 took place in Killarney. In carrying out the survey, interviewers approached tourists and asked them if they would like to take part in a very quick survey, with a maximum survey length of 10 minutes.

The overseas tourist respondent's recruitment procedure involved intercepting likely foreign visitors at each sampling point, determining eligibility, explaining the purpose and voluntary nature of the study; and obtaining the respondent's cooperation to complete the brief interview. If agreeable to participate, the respondent was then asked what the main purpose of their trip to Ireland was, holiday or mainly business? If it was mainly business the questionnaire was terminated as the objective of the survey was to elicit responses from those here on vacation. Interviews were conducted on each day of the week (including the weekend) to ensure that the sample was as representative as possible. Only one individual per travelling group was interviewed.

In order to correspond with known overseas tourist aggregates, by country of origin, minimum quotas by country of residence were required for key tourist markets. These quotas were adhered to in the screening process. In particular, the survey company was required to achieve a minimum of 38% British, 20% North American, 7% German and 6% French. To achieve these quotas each interviewer was instructed to collect, per sampling point and for every 24 interviews, a minimum of 7 respondents from the UK (excl. Northern Ireland), a minimum of 3 from North America, a minimum of 1 from Germany and a minimum 1 from France. Free fall out on age and gender was permitted but interviewers were asked to get a good spread in terms of these characteristics. The distribution of nationalities in the sample closely mirrored FI estimates for the breakdown of nationalities amongst overseas tourists as reported for 2017(Figure 3).

Figure 3. Distribution of Overseas tourists by Nationality. Fáilte Ireland statistics versus Sample



3.4. Weighting and Analysis

Data was collected using a computer-assisted personal interviewing (CAPI) approach where the interviewer uses an electronic device (tablets) to show the questions and record answers. This also facilitates instant upload to the database. All data was handled in compliance with confidentiality and GDPR regulations. In aggregating the participation and expenditure data from the sample to the total population of overseas tourists, aggregate estimates published by FI was used to weight the sample. The data was analysed using Microsoft Excel and the statistical software package STATA.

04

Survey findings: Overseas coastal and marine tourism in Ireland

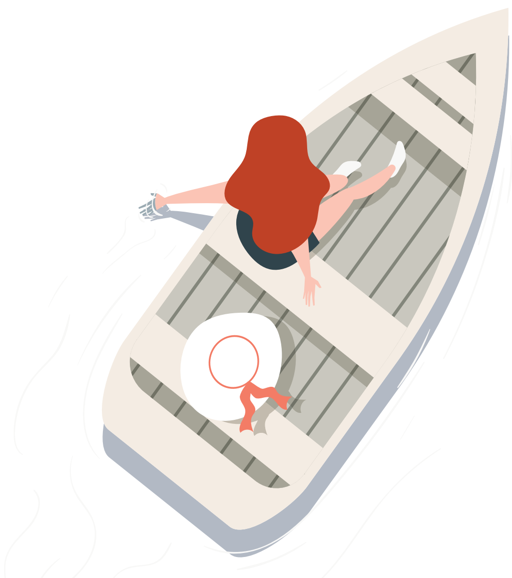
4.1. Overview of the Sample

The profile of the survey participants is presented in Table 2. The average age of the respondents was 43.5, with the minimum age allowed by the sampling strategy being 18 and the maximum age of participant being interviewed being 83. The gender distribution of the participants was 53% male and 47% female. Just under 50% of respondents were married and 65% had some form of third level education. Seventeen per cent were retired, 63% were full time employed and 10% were currently students. As noted in the previous section, the country of origin of respondents closely matched, by design, FI estimates. The final sample contained 41% British, 28% American and Canadian, 14% German, 9% French, 2% Italian, 1% Australian/New Zealanders, 4% Other Europeans, and 1% all other nationals.

The travelling parties averaged 2.9 adults and 0.3 children. Approximately 20% of those interviewed were travelling as part of some form of organised tour group. Participants indicated an average trip duration of 7 days but this varied within a range of 1 to 45 days (these extremes in the range representing just 1 observation in each case). Seven days was also the modal value in the distribution of trip duration. British participants took, on average, shorter trips of 5.4 days duration, while those visiting from outside Europe or North America took marginally longer trips with an average 8.9 days duration.

Across the entire sample, approximately half of the trip was spent (3.45 days), or was being planned, in what the participants perceived as being coastal areas (a coastal city, town, village or rural area close to the sea). Interestingly, however, 146 individuals indicated that they would be spending no time in coastal areas during their visit. This is despite the fact that 126 of these were interviewed in Dublin (121) or Galway (5), which are cities on the coast, but as has been discussed elsewhere[17] reflects the fact that many visits to major coastal cities have very little to do with the actual coastal location of those cities[18]. Tourists visit these cities for the urban rather than the coastal experience.

It was also observed that on average 69% of participants were aware of the WAW route and the entire sample had planned an average of 2.5 days on the route during their visit, which constituted 35% of average trip length. Awareness was highest amongst North American visitors (78%) and lowest amongst those visiting from outside Europe or North America (59%). For those who indicated positively that they would be spending time travelling on the WAW, the average trip taken or planned on the route was 4.2 days. A breakdown of the coastal and marine leisure activities undertaken by participants in the sample and their expenditure patterns are presented in the following sections.



[17] SEMRU (2019). Ireland's Ocean Economy, SEMRU publication, NUI Galway.

[18] Six individuals who indicated that they would be spending no time in coastal areas did indicate later in the survey marine related activities that they were participating in during their trip.

Table 2. Summary Statistics for Sample

Tourism	Mean	Std. Dev.	Min	Max
Age	43.54	16.63	18	83
Number of children in travelling party	0.28	0.67	0	4
Number of adults in travelling party	2.86	1.84	1	20
Proportion in a tour group	0.21	0.41	0	1
Proportion aware of Wild Atlantic Way	0.70	0.46	0	1
Number of days spent in Ireland	6.86	4.22	1	45
Days in Coastal Areas	3.45	3.66	0	40
Days on Wild Atlantic Way	2.46	2.94	0	22
Proportion male	0.53	0.50	0	1
Proportion married	0.49	0.50	0	1
Proportion with third level education	0.65	0.48	0	1
Proportion retired	0.18	0.38	0	1
Proportion students	0.10	0.30	0	1
Proportion full time employed	0.64	0.48	0	1
Proportion British	0.41	0.49	0	1
Proportion Canadian	0.05	0.22	0	1
Proportion French	0.09	0.28	0	1
Proportion German	0.14	0.35	0	1
Proportion American	0.23	0.42	0	1

British tourists in the sample were also asked if they thought they would be less likely to travel to the Republic of Ireland for holidays in the future because of Brexit. Only 17% said it was less likely although a further 29% indicated that they didn't know.

4.2. Coastal and marine tourism activities undertaken by the sample

This section presents an overview of the coastal and marine leisure activities that the sample of overseas tourists participated in. All 20 activities used in the survey instrument are listed in Table 3. The activities are also grouped into two higher levels of classification to facilitate mapping of activities by county and to examine differences between those undertaking activities that require direct contact with marine waters and those that do not. The groups of activities contained within these higher level classifications are shown in the final two column of Table 3.

Respondents reported that they took part in 1.46 marine or coastal leisure activities during their trip, with 38% of the sample indicating that they undertook no such activity. For active participants (taking part in at least 1 activity) the average number of activities undertaken was 2.31. This rose to 3.32 activities for the 127 respondents who stated that they participated in an activity that involved direct contact with the marine environment (the first category in Grouping 2 in Table 3, and henceforth referred to as water based activities).

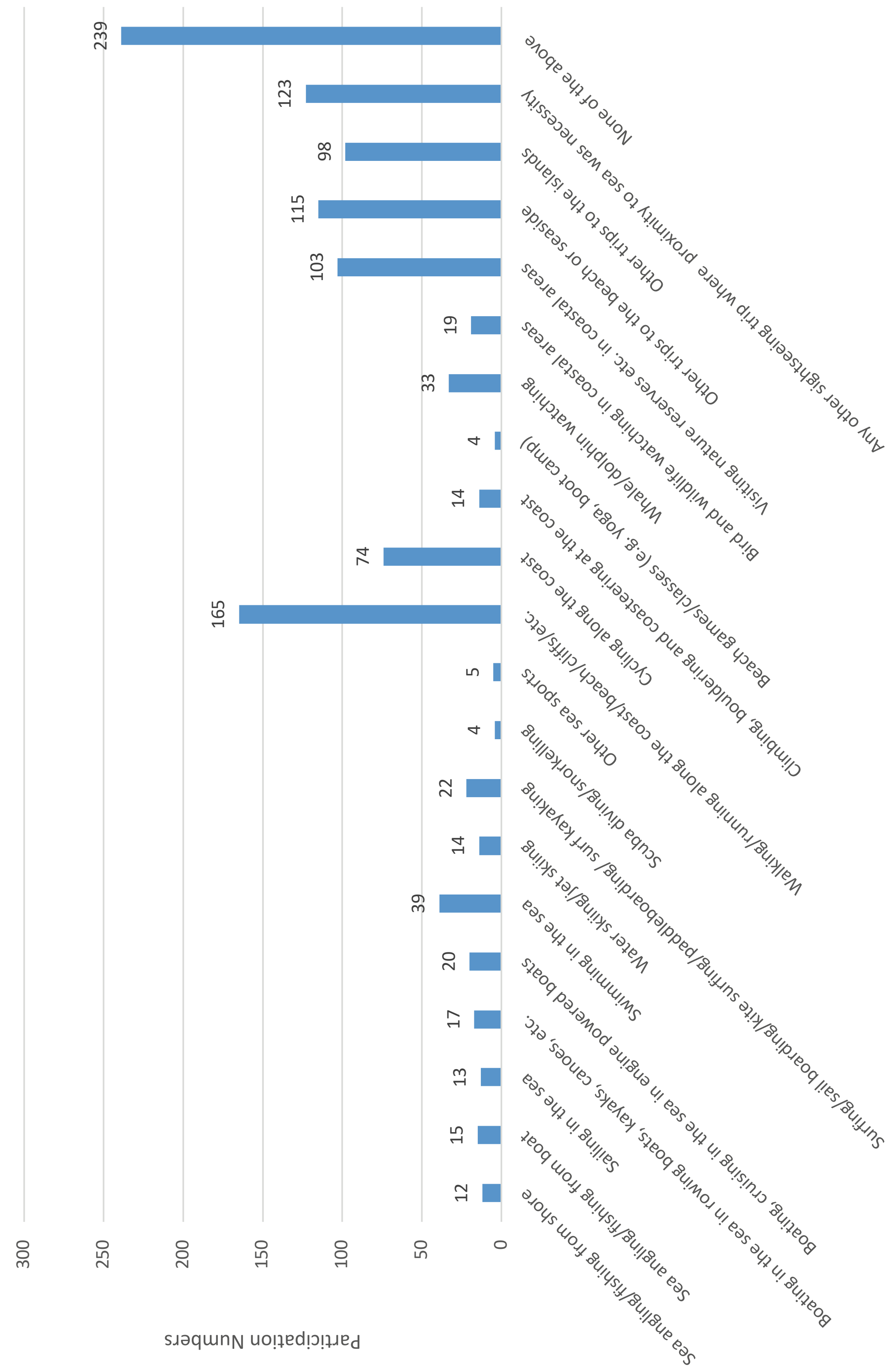
Table 3. Coastal and marine tourism activity classification

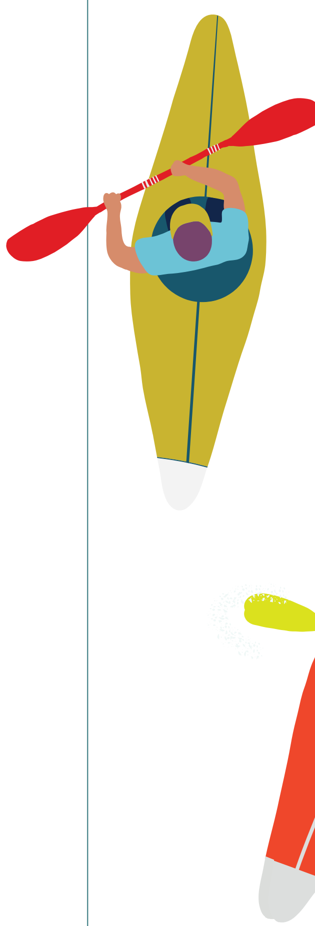
<table>
<tr><th>Marine Related Activity</th><th>Grouping 1</th><th>Grouping 2</th></tr>
<tr><td>Sea angling/fishing from boat</td><td rowspan="2">Sea Angling</td><td rowspan="11">Water Based Activity</td></tr>
<tr><td>Sea angling/fishing from shore</td></tr>
<tr><td>Boating, cruising in the sea in power-boats, rigid inflatable boats or boats with in-board engine</td><td rowspan="3">Boating/Sailing</td></tr>
<tr><td>Boating in the sea in rowing boats, kayaks, canoes, etc.</td></tr>
<tr><td>Sailing in the sea</td></tr>
<tr><td>Swimming in the sea</td><td>Swimming</td></tr>
<tr><td>Surfing/sail boarding/kite surfing/paddle boarding/ surf kayaking</td><td rowspan="4">Sea sports</td></tr>
<tr><td>Scuba diving/snorkelling</td></tr>
<tr><td>Water skiing/jet skiing</td></tr>
<tr><td>Other sea sports</td></tr>
<tr><td>Whale/dolphin watching</td><td rowspan="3">Nature Viewing</td></tr>
<tr><td>Bird and wildlife watching in coastal areas</td><td rowspan="9">Coastal Leisure Activity</td></tr>
<tr><td>Visiting nature reserves etc. in coastal areas</td></tr>
<tr><td>Other trips to the islands</td><td>Island Trips</td></tr>
<tr><td>Cycling along the coast</td><td>Biking</td></tr>
<tr><td>Beach games/classes (e.g. yoga, boot camp)</td><td rowspan="3">Beach/Shore Activities</td></tr>
<tr><td>Climbing, bouldering and coasteering at the coast</td></tr>
<tr><td>Other trips to the beach or seaside</td></tr>
<tr><td>Walking/running along the coast/beach/ cliffs/etc.</td><td>Walking</td></tr>
<tr><td>Any other sightseeing trip where the proximity to the sea was a necessity</td><td>Sightseeing</td></tr>
</table>

The rates of participation for each of the 20 activities are presented in Figure 4. As was expected, coastal activities rather than water based activities were more popular. *Walking/running along the coast/beach/cliffs/*etc. was the activity most undertaken in the sample (165), followed by *Any other sightseeing trip where the proximity to the sea was a necessity*'[19] (123) and *Other trips to the beach or seaside* (115). Visiting nature reserves along the coast, visiting offshore islands and cycling were also popular coastal leisure activities amongst respondents (103, 98, and 74 participants respectively). While fewer respondents participated in water based activities, swimming in the sea (39), whale and dolphin watching (33) and different forms of boating/sailing activities (50) were relatively popular amongst respondents. Twenty seven respondents indicated that they were participating in sea angling, while a further 45 indicated that they were participating in *some other sea sport*, such as diving, jet/water skiing, surfing/sail boarding/kite surfing/paddle boarding or surf kayaking. No statistical differences in the number of coastal marine related activities undertaken was found across nationalities or in the proportion of each nationality undertaking such activities. Further details in relation to the average number of days spent by activity is provided in Appendix 1.

[19] 'Any other sightseeing trip where the proximity to the sea was a necessity' was the last activity in the list presented to the respondents in the survey instrument

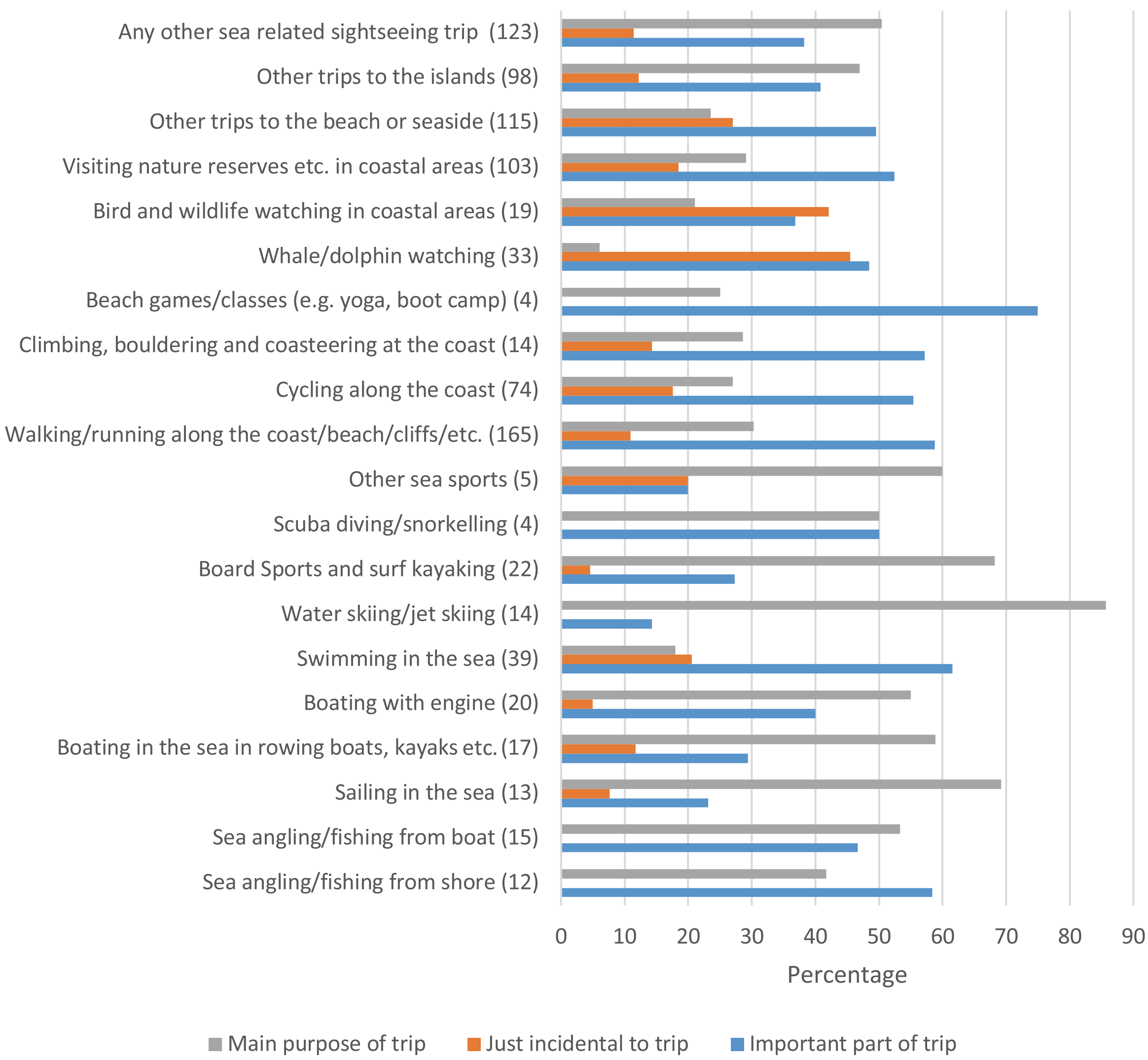
Figure 4. Activity participation rates in sample

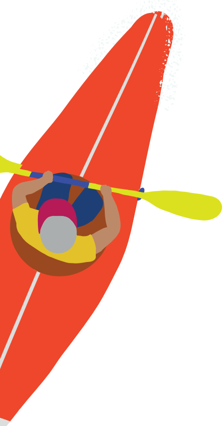




It is interesting to note that the more specialised the activity is, the more likely it is to have been the main purpose for undertaking the trip to Ireland. This is especially the case with the water based activities. Activities such as sailing, board sports and jet-skiing were the main purpose of the trip for approximately 70% in each case (Figure 5). Coastal leisure activities are more likely or just as likely to be "an important part of the trip". Whale/dolphin watching, and bird and wildlife watching in coastal areas appear to be activities that respondents participate in on a more ad hoc basis, with approximately 40% of those undertaking these two activities indicating that they were 'just incidental to their trip to the Republic of Ireland'.

Figure 5. Importance of marine related activity in terms of the trip to Ireland (%)





An important objective of the study was to discover where along the coast overseas visitors to Ireland planned to undertake their coastal and marine leisure activities. Accordingly, following the question on activity participation, respondents were then asked to indicate in what counties they had, or planned to undertake the activities. As show win Figure 6, the results indicate that overseas visitors undertake the majority of their coastal and marine related activities on the West Coast of

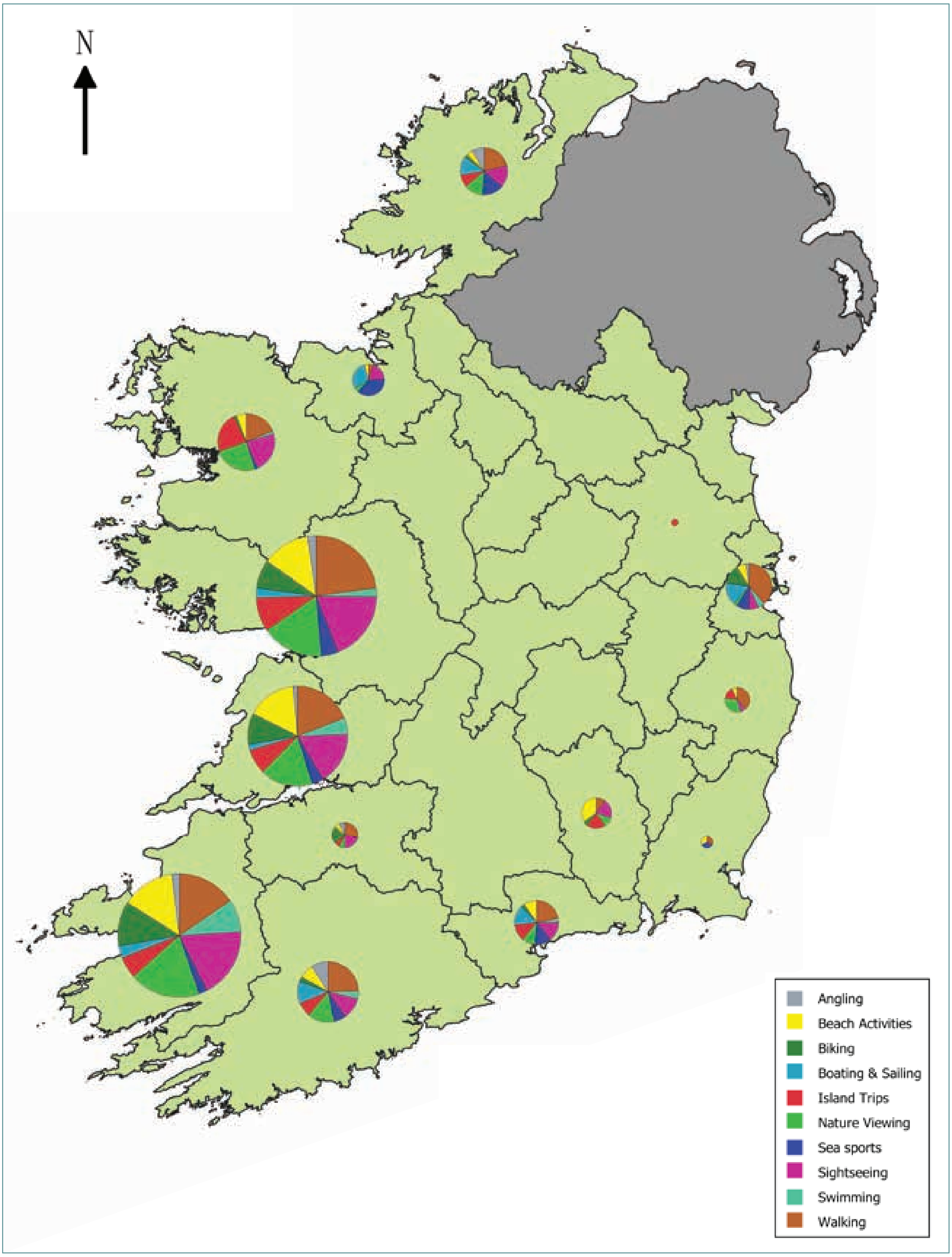
Ireland. County Kerry, County Galway and County Clare were the leading counties, in that order, for participation in coastal and marine tourism activities. While this result may be partly influenced by the fact that a significant part of the survey took place in Galway and Kerry, at the same time, as a counterbalance, just over half of the sample was interviewed in Dublin. Interestingly, Louth was the only coastal county not visited by any respondent to undertake any marine or coastal related activity.

Regional performance figures for general overseas tourism from FI would suggest that Dublin is by far the most visited county in Ireland, followed by Cork, Galway, Kerry and Clare[20]. While it is not surprising that Dublin does not rank very highly amongst overseas visitors for coastal and marine specific activities, the fact that Cork is ranked 4th in the coastal activity destinations rather than 2nd as in the general FI regional rankings can perhaps be explained by a number of key marine related tourist attractions in counties Galway, Clare and Kerry that put them ahead in terms of popularity. For example, the Aran Islands and the Connemara coastline in Galway and the coastal Ring of Kerry route are 'must see' attractions for many overseas visitors. Also, the Cliffs of Moher visitor centre in county Clare was recorded as the second most visited tourism destination in Ireland in 2018, hosting 1.58 million tourists. The spatial distribution observed along the west coast also reflects previously recorded tourism travel along the WAW, where FI have observed that tourism is not spread evenly or proportionately along its entirety. FI note that "there is significantly more tourism activity in the southern half of the WAW (Galway City being the dividing line)"[21]. A more detailed breakdown regarding the county level marine and coastal activity amongst respondents can be found in Appendix 2.

[20] Fáilte Ireland (2018). 2017 Topline Tourism Performance by Region, Fáilte Ireland Publication, Dublin

[21] Fáilte Ireland (2018). Planning for Tourism. Submission by Fáilte Ireland, the National Tourism Development Authority to Issues and Choices: Ireland 2040 Our Plan National Planning Framework. http://npf.ie/wp-content/uploads/2017/09/0621-Failte-Ireland.compressed.pdf

Figure 6. Marine and coastal tourism activities at county level

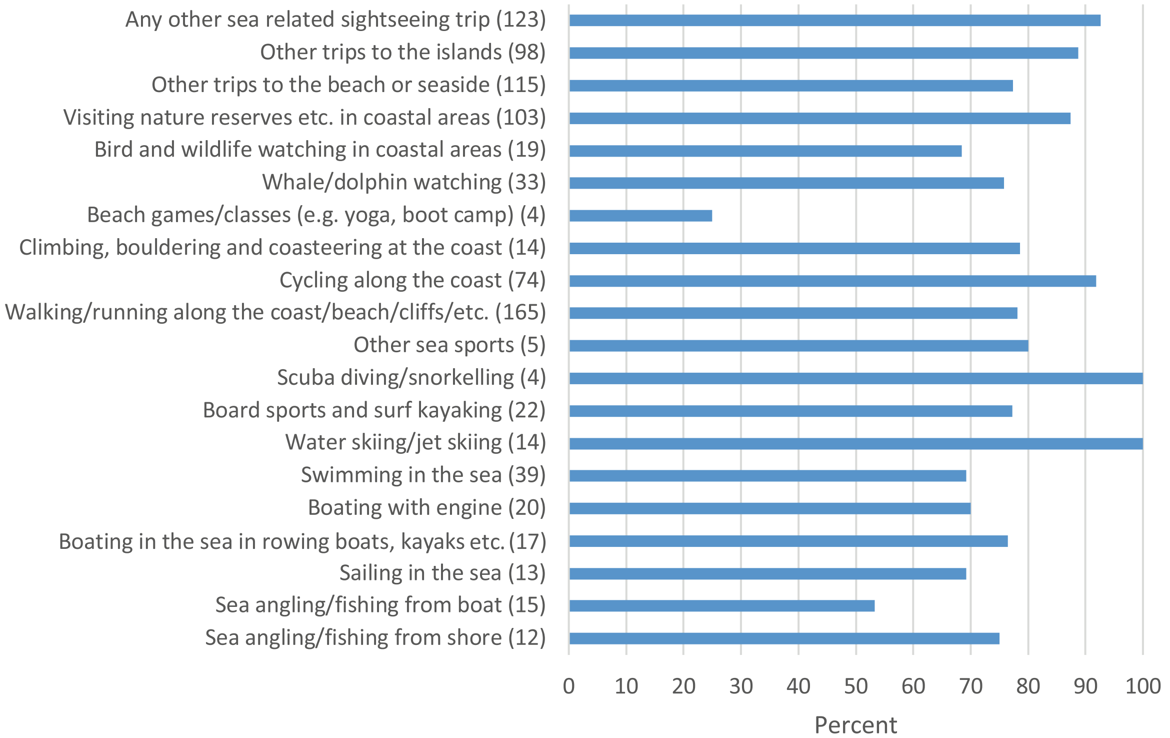


[20] Fáilte Ireland (2018). 2017 Topline Tourism Performance by Region, Fáilte Ireland Publication, Dublin

[21] Fáilte Ireland (2018). Planning for Tourism. Submission by Fáilte Ireland, the National Tourism Development Authority to Issues and Choices: Ireland 2040 Our Plan National Planning Framework. http://npf.ie/wp-content/uploads/2017/09/0621-Failte-Ireland.compressed.pdf

Finally, satisfaction levels with the facilities associated with the coastal and marine related activities in Ireland were analysed. As illustrated in Figure 7, overall satisfaction with facilities for the various activities was high (17 activities had a 'very satisfied' rating from at least 70% of participants while only one activity had less than 50% of participants indicating that they were 'very satisfied' and in that case there was only four observed participants (beach games/classes)). The highest levels of overall satisfaction were recorded for diving, water/jet skiing and cycling although the numbers in the sample involved in the first two of these activities are extremely low. The dominant activity category of *any other sightseeing trip where the proximity to the sea was a necessity* also achieves a 'very satisfied' rating of over 90% amongst respondents active in this category.

Figure 7. Percentage of participants who were 'very satisfied' with the facilities for the marine related activities in Ireland



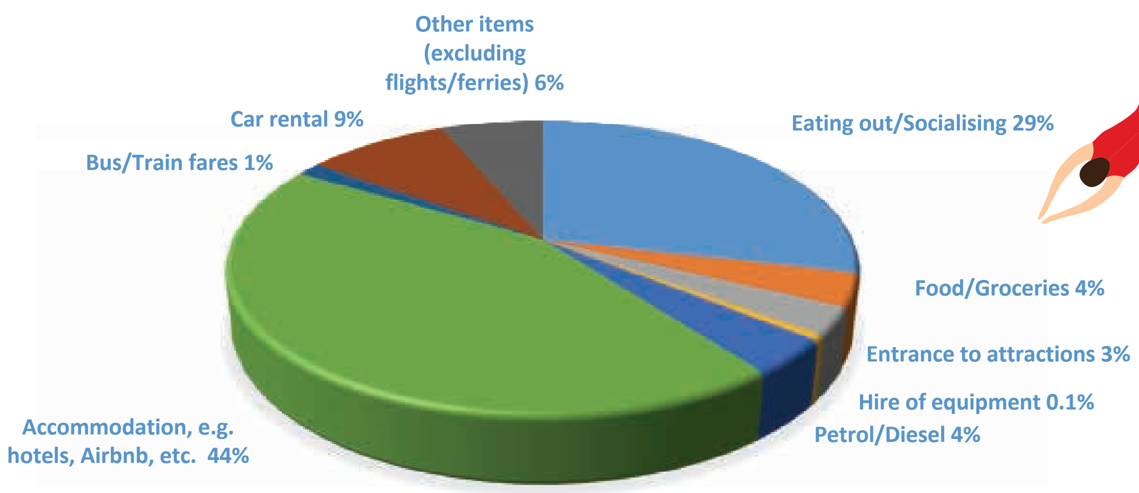
4.3. Expenditure Profile of Overseas Visitors

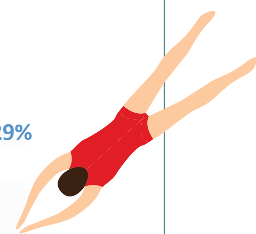
Expenditure data on overseas visitors to Ireland was collected in the survey and tabulated (Table 4). The data relates to each travelling party rather than the individual. The average total expenditure per travelling party of overseas visitors in the sample was €1,630. Of this, an estimated €699 (43%) was spent in coastal areas. The proportional expenditure on the different items is presented in Figure 8. Accommodation makes up the largest proportion; 44% of the total average expenditure per trip per travelling party. According to the survey outcome, foreign tourists in Ireland also spend a significant proportion of their budget on eating and socialising (22%), and car rental and associated fuel costs (13%). Hire of equipment, which is directly related to water based sports, were found to be relatively low at just 0.1% of total spending.

Table 4. Estimated expenditure per overseas traveling party on accommodation, meals, travel and other items.

Expenditure Item (€)	Mean	Std. Dev.	Min	Max
Eating out/Socialising	467.12	467.63	0	3600
Food/groceries, i.e. self-catering, snacks, etc. (not including eating out)	59.07	81.41	0	500
Entrance to local visitor attractions	48.32	73.81	0	600
Hire of equipment, e.g. tents, sports equipment, etc.	9.04	49.23	0	700
Petrol/Diesel	63.20	86.39	0	500
Accommodation, e.g. hotels, Airbnb, etc.	714.84	802.37	0	5,000
Maps/Guidebooks/Leaflets	5.90	12.04	0	100
Bus/Train fares	23.86	54.92	0	480
Car rental	142.06	270.82	0	2,200
Other items (excluding flights/ferries to/from Ireland)	97.07	288.79	0	4,400
Total expenditure per trip and travelling party	1,630.49	1,362.24	10	9,130
Coastal expenditure per trip and travelling party	698.74	920.91	0	6,600

Figure 8. Expenditure distribution by category of overseas tourists in Ireland





Based on the number of adults in each travelling party, per person expenditure estimates for overseas visitors was also calculated[22] (Table 5). The number of participants who took part in marine related activities, and water based activities, and the average spending per person in each case are also presented in Table 5. Respondents who indicated that they were participating in any of the 20 designated activities in the survey instrument were asked how much they expect to spend in total on each of those separate activities during their trip.

[22] In calculating per person spending the recommended ratio estimation method is applied. Averages in the sample were individually computed for group trip spending and numbers in each travelling party over the age of 18 and then the former is divided by the latter (Ya-Yen Sun, Y and Stynes, D. 2006. A note on estimating visitor spending on a per-day/night basis. Tourism Management 27, 721–725).

The estimated total spend per person for the full sample is €569. Interestingly, this is only 4.5% different from the average overseas tourist expenditure estimated using FI statistics for 2018 (€544)[23]. The estimated coastal area expenditure per person in the sample was estimated to be €244 while the estimated marine related activity spend per person was estimated to be €82, with only an average of €25 per person being spend on on-water activities.

Table 5. Total, Coastal, Marine Related and Water Based Expenditure per Person

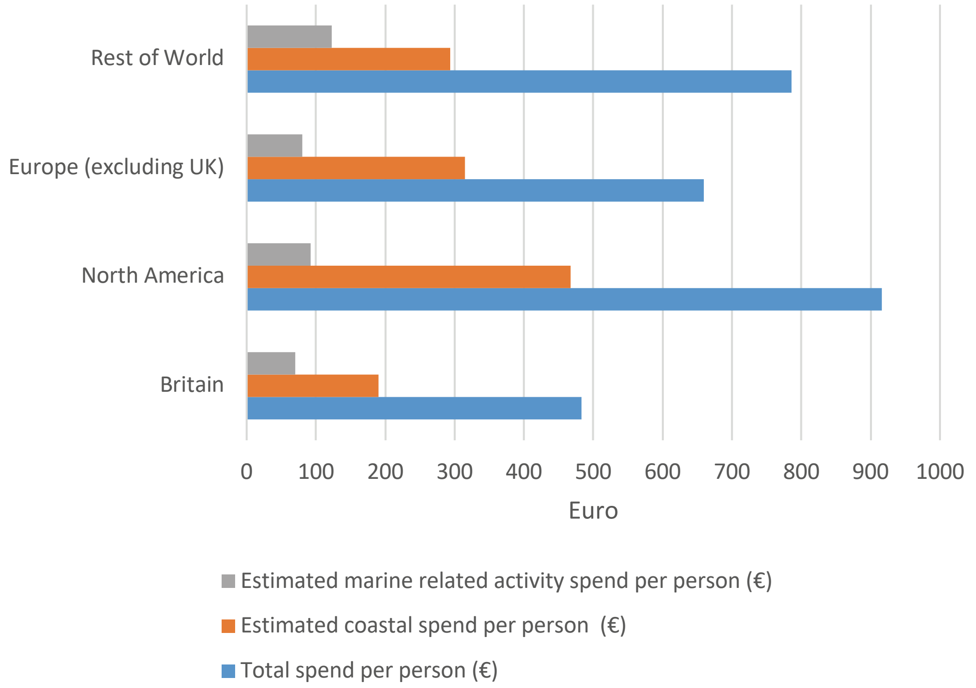
	Full Sample	Marine Activity Active	Water Based Activity Active
Number in Sample	620	338	127
Average total spend per person (€)	569	710	648
Estimated coastal area spend per person (€)	244	346	303
Estimated marine related activity spend per person (€)	82	150	192
Estimated water activity spend per person (€)	25	40	120

Those 338 individuals in the sample who actively engaged in marine based activities during their stay have a statistically significant higher (25%) total spend per trip (€710) than the full sample. They also stay on average 1.32 more days per trip compared to the sample average. Maybe less surprising, they also have a higher coastal and water based spend per trip than the sample average. Of these 338 individuals, 202 indicated that a marine based activity was their main purpose for visiting Ireland. The average expenditure for this specific group is even higher at €820 per person per trip. The 127 individuals who indicated that they were participating in water activities also display a statistically significant higher total, coastal and marine activity expenditure per trip than the sample average. The total and coastal spend per person of this latter group is not however as high as the marine active category. They do spend more, however, in terms of marine activities than the more general marine active category.

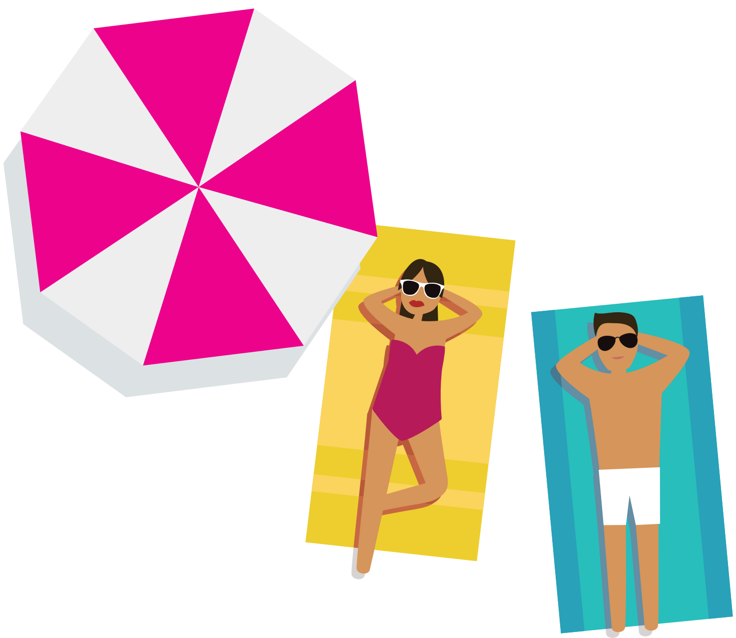
The breakdown of expenditure per person, by country of origin, across the three expenditure measures (total, coastal, and marine activities) is presented in Figure 9. North Americans have the highest total (€917) and coastal (€468) spend per person, while British visitors recorded the lowest spend in these two categories, €483 and €190, respectively. These differences are statistically significant in all cases. It is also worth noting that it is overseas tourists from the rest of the world that spend most per person on marine related activities.

[23] The FI figure is derived by dividing the Total Overseas Revenue figure by the Total Overseas Numbers figure for 2018 in tables 1 and 2 of the report: Fáilte Ireland (2019). Tourism Facts 2018 Preliminary. http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/Publications/Preliminary-Tourism-Facts-2018.pdf?ext=.pdf

Figure 9. Expenditure per person by country of origin



Data on the average expenditure for each of the 20 marine activities, for those who participated in them, are also presented in Appendix 1. A cautious view has to be taken of these figures given the low numbers involved in some of the activities. Nevertheless, it is clear that any activities involving specialised equipment tend to have the highest associated expenditures. The average expenditure on any of the boating related activities, in particular, are significantly higher on average. At the other end of the scale swimming would appear to be the least costly marine activity undertaken.

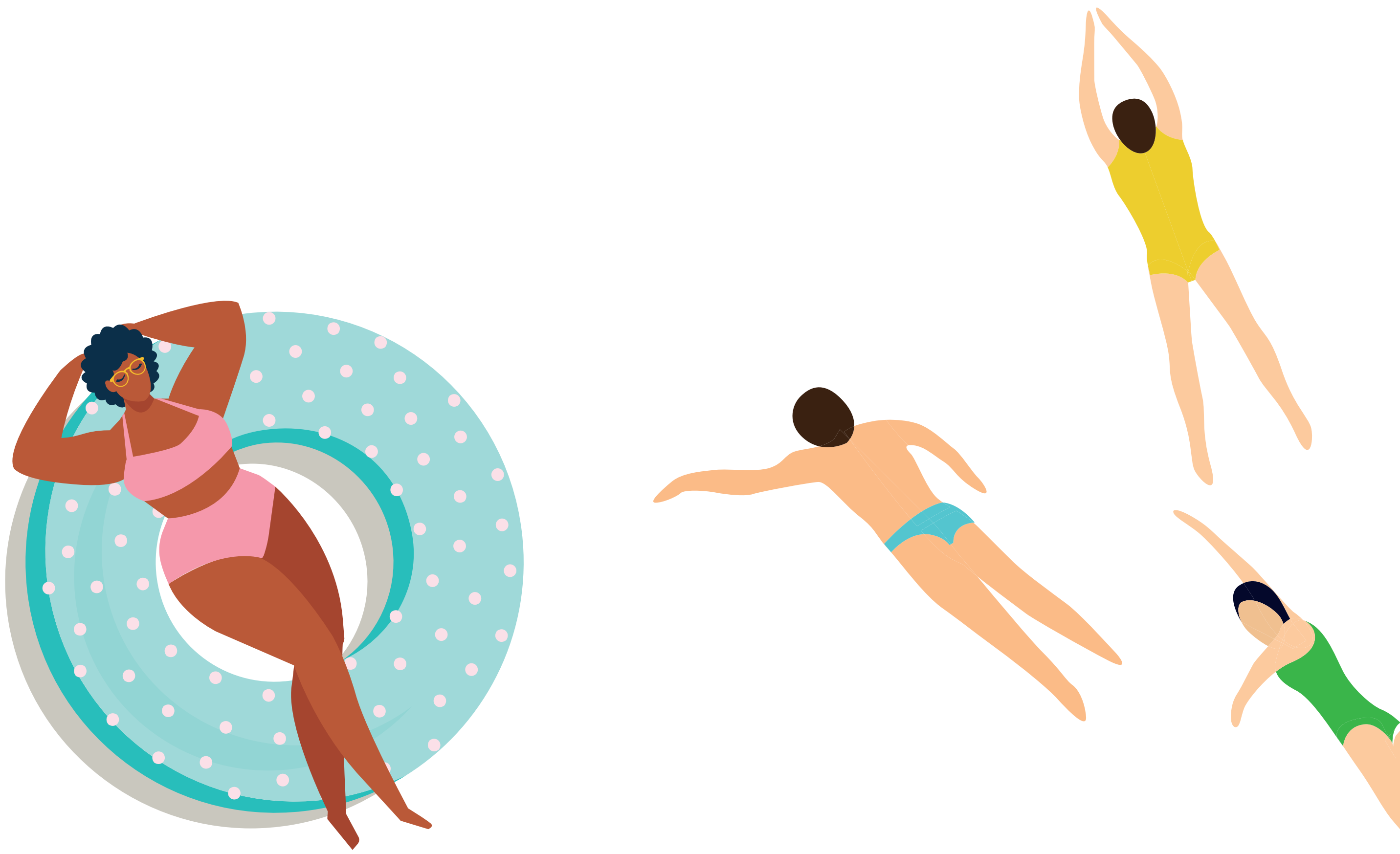


€1.94 billion is spent by overseas visitors holidaying in Ireland in coastal areas.

Finally, in this section, aggregate estimates of total expenditure for overseas visitors are generated based on the results of the survey (Table 6). The total expenditure for overseas visitors[24] is estimated to be €4.51 billion. Of that, €1.94 billion is estimated to be spent in coastal areas. The marine related activity expenditure, or what might truly be referred to as marine tourism, is estimated to be worth €650 million, while €198 million was spent specifically on water activities. Marine tourism, therefore, represents an estimated 12% of total overseas tourism spend. (assuming FI broad definition of overseas tourism). This is quite close to the FI estimate for marine related tourism that is often quoted as being 10% of total tourism revenue[25].

Table 6. Estimated Aggregate Expenditure of Overseas Tourists by Category*

	Estimated totals
Total spend (€m)	4,513.31
Total coastal spend (€m)	1,935.88
Total marine related activity spend (€m)	649.79
Total water activity spend (€m)	198.30



[24] Based on the most recent FI estimates of total overseas "holidaymaker" and "visiting friend/relatives" numbers of 7,932,000 for 2018. FI also have a broader estimate of total overseas tourist numbers which was 9,580,000 for 2018 but this includes business and 'Other' overseas visitor categories.

[25] FI estimate for marine tourism in Ireland, 2011-2020, using the wide definition of marine tourism, which refers to marine and coastal tourism water based activities as well as the activities and services adjacent to the coastline. See reference to the 10% figure in the FI CEO speech at the 2013 Ocean Wealth Summit (http://www.failteireland.ie/Utility/News-Library/Significant-growth-in-marine-tourism-achievable.aspx). It is not clear what exactly this 10% figure is based on or if it refers to just overseas tourist expenditure or both overseas and domestic tourism.

05
Conclusions

This report presents estimates of the value of coastal and marine overseas tourism activities, based on information provided by overseas visitors in a survey conducted in August and September 2018. The results highlight the important contribution that coastal and marine related activities make to both local coastal economies and to the national economy. The analysis indicates that total coastal tourism expenditure was approximately €1.94 billion in 2018, while marine tourism generated €650 million. Activities such as coastal sightseeing, beach vitiations, island visits and walking/running and cycling along the coast are popular amongst overseas visitors. The water based activities are less popular, but 20% of those sampled did participate in boating and/or other sea sports. Satisfaction with the available marine related activity facilities was also found to be very high.

There is growing recognition of the potential for coastal and marine tourism in Ireland. New initiatives such as new coastal cruise offerings along the Cliffs of Moher and out of Killybegs Harbour to Sliabh Liag and the Great Lighthouses of Ireland tourism initiative developed by the Commissioners of Irish Lights are just a couple of examples. New small and medium sized enterprises offering surfing lessons, sea kayaking trips, coasteering, nature watching and coastal tour guides, island excursions, sea angling and sailing yacht charters have become more evident in recent years and can now be found right around the coast. A developing network of water trails, currently across five sites along the west coast of Ireland, called Blueways, also offer water based activities like kayaking and snorkelling.

The WAW has been extremely successful in promoting coastal tourism in Ireland. It is though, by design, more focused on land based tourism developments than marine based activities. Making the WAW more 'blue' may be a worthwhile policy objective given that the results here indicate that marine active overseas tourists stay longer and spend more on average during their trip, while those who indicated that the marine related activities were the main reason for their visit have an even higher total expenditure per person. Specific targeting of these tourist types could lead to significant additional revenue being generated in coastal areas. Such a policy would also be in line with the Government's tourism policy, "People, Place and Policy – Growing Tourism to 2025" where one of the proposals indicates that the marketing of Ireland as a visitor destination should be "evidence based and targeted at a range of geographical and segmental markets with the highest revenue growth potential". To achieve this, planning and investment in appropriate coastal and marine infrastructure is something that should be to the fore in the implementation of the Regional Spatial and Economic Strategies which are a key part of Ireland's National Planning Framework: Project Ireland 2040.

It has been pointed out, for example, that growth in marine tourism may be hampered by limited access to our coastline in certain areas. Access to the coastline and marine environment in some areas can be quite limited due to issues such as landowner concerns, insurance and lack of adequate pier/harbour facilities. Limited marina berths between the Shannon estuary and Killybegs in Co. Donegal is an example of a constraint to the development of sailing/boating tourism initiatives along the West and North West coasts. The devolution of smaller ports to local authority control in recent years should allow for more focused efforts to deal with some of these area specific issues. Insurance for leisure activity operators has also become a major issue and swift policy action is now needed to ensure that insurance cover is both available and accessible at a reasonable price for existing as well as potentially new marine leisure operators.

Maintaining Ireland's competitiveness as a tourist destination for the largest overseas market, Britain, also presents a challenge due to concerns over Brexit. Results from this survey suggest that 17% of British tourists believed that Brexit would be a barrier to making future visits to Ireland with a further 29% unsure if it would impact on their future travel plans to Ireland or not. Despite worries over a potential fall in the numbers of visitors coming from Britain, due to Brexit related fluctuations in the exchange rate, British numbers visiting Ireland in 2018 actually increased marginally by 0.8% on the previous year. The continued promotion of Ireland's tourism offering in Britain and the development of good value fares and packages would help maintain the numbers of British visitors post Brexit. Result here though suggest that the British visitor spends significantly less than visitors from other parts of the world. If maximising overseas revenue was the policy objective then increased marketing of Ireland as a tourism destination to these other markets is also a worthwhile undertaking.

A complex marine planning process has also acted as a barrier to marine tourism developments especially in cases where foreshore licensing applications are required. Fortunately, this situation is now changing. A new Maritime Spatial Plan (the National Marine Planning Framework) is currently being put in place that will "create an overarching framework for marine decision-making that is consistent, evidence-based and secures a sustainable future for Ireland's marine area"[26]. The Government is also developing new legislation under the Marine Planning and Development Management Bill 2019, which is aimed at introducing 'a single State consent system' for the maritime area. This means that one agency will assume responsibility for the granting of leave to apply for consent/planning permission to An Bord Pleanála/local authorities for marine related projects.

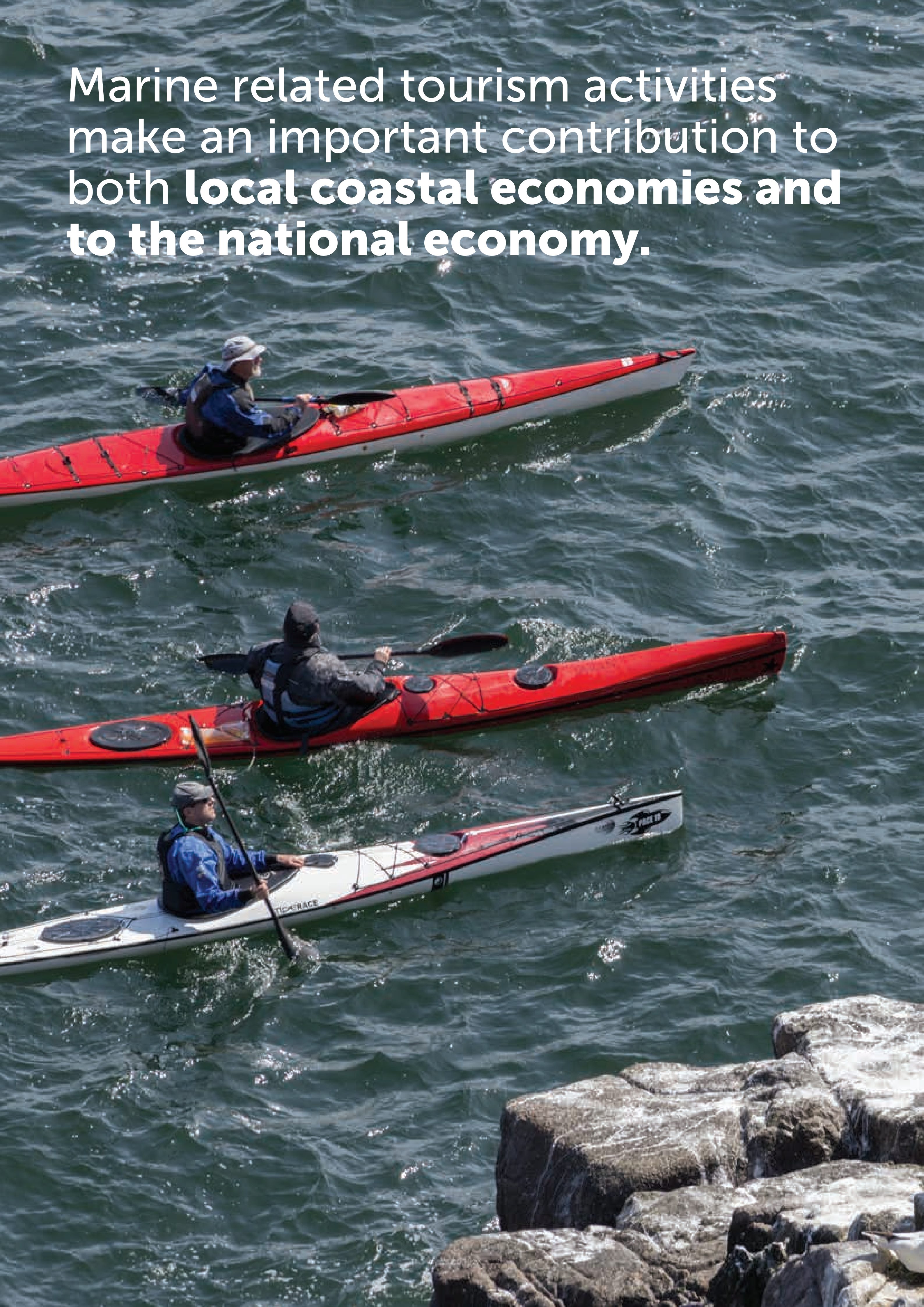
Close engagement with overseas visitors and tracking their spending pattern is essential to understand and develop adaptive policy-making strategies that can respond to their expectations in terms of leisure and tourism activities in marine and coastal areas. There would be considerable value, therefore, in repeating this survey perhaps every five years. This would allow for the monitoring of changing trends in tourists' participation in coastal and marine related activities and aid marine planning and investment in the sector. The Irish Government's National Marine Research & Innovation Strategy 2017–2021 notes that research in the area of marine tourism is "Ad-hoc" and suggest that other topics worthy of further research are innovation in delivering new visitor experiences, performance and destination development benchmarking, consumer research and trends, citizen/community engagement and awareness and a national maritime interpretation strategy.

A number of limitations should be noted in terms of the study. Firstly, the overseas tourists were interviewed at different points during their trip. Ideally, it would be better to interview overseas visitors at the airport or ferry terminal at the end of their vacation. Interviewing in the departure lounges of airports and ferry terminals was not, however, an option available to the research team. Respondents were asked, therefore, to state their activities in a manner that included what had already happened and what they planned for the rest of their trip in the Republic of Ireland. Similarly, respondents were asked to provide expenditure information for the entire planned trip. Nevertheless, given that the average trip expenditure estimates and average trip duration estimates are closely aligned with FI figures, we are confident that the approach used and the results arrived at are robust.

While the sample size of 620 was good for a survey of this type, the limited observations in the sample participating in a number of the marine related activities means that a cautious view should be taken of the average and county estimates for the individual level marine based leisure activities. These estimates are presented in Appendix 1 and 2, as additional information only and are not to be taken as representative. It would also have been beneficial to broaden the interviewing points out beyond the four areas used, but this would have added considerably to the cost of the survey. As discussed, however, the spatial pattern observed for participation in marine related activities does

Marine tourism represents 12% of total overseas tourism spend.

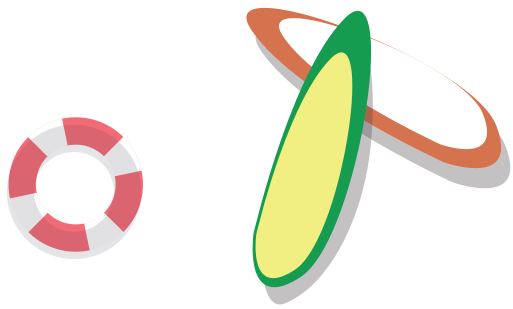
Marine related tourism activities make an important contribution to both **local coastal economies and to the national economy.**



broadly agree with general regional overseas tourism figures from FI. Future iterations of the survey should still endeavour to broaden out the survey interception points.

The survey was conducted over just two months of the year. While the time spent visiting coastal attractions may be similar throughout the year, it is to be expected that participation in marine leisure activities will be less during the winter months, due to weather conditions. However, it should be noted that over 50% of overseas tourists in 2018 visited during the 5 months of May to September[27]. Domestic residents are another important segment within the marine and coastal tourism market. Coincidently, SEMRU is currently conducting a national survey of coastal and marine specific tourism and leisure activities and associated expenditure by Irish residents, in order to estimate the total value of marine tourism and leisure activities in Ireland. This work is ongoing and aims to update a previous national survey of marine leisure activities published by the MI in 2003.

Finally, it is worth pointing out that Ireland's particularly healthy marine environment is one of the major attractions for overseas tourism participating in marine related activities. Speaking at the Our Oceans Wealth Summit in Cork, in June 2019, US Senator John Kerry noted how "there is no blue economy if we don't protect our oceans". This is particularly true for the coastal and marine based tourism sector which relies on high environmental conditions and on good water quality. Research consistently shows that overseas visitors to Ireland value very highly the scenery and natural environment that the country has to offer and the marine vistas and environment are an important part of that[28]. Policy makers will also need to be mindful of the pressures on the marine environment that increased marine active tourist numbers could bring, particularly if confined to a limited coastline. Future developments of marine and coastal tourism must continue, therefore, to reflect the highest standards of environmental quality and sustainability.



[27] Central Statistics Office (2019). Overseas Travel CSO statistical Release, 25 April 2019, CSO Publication, Dublin

[28] Irish Tourism Industry Confederation (2018). Tourism. An Industry Strategy for Growth to 2025. ITIC Publication

Appendices

Appendix 1. Marine related Activities Statistics

	Number of participants in Sample	% of Sample	Days participated in activity		Expenditure per active person (€)	
			Mean	Std. Dev.	Mean	Std. Dev.
Sea angling/fishing from shore	12	1.94	1.25	0.62	62.50	44.08
Sea angling/fishing from boat	15	2.42	1.00	0.00	78.07	38.58
Sailing in the sea	13	2.10	1.38	0.77	86.15	54.43
Boating in the sea in rowing boats, kayaks, canoes, etc.	17	2.74	1.59	0.80	120.29	230.85
Boating, cruising in the sea in power-boats, rigid inflatable boats or boats with in-board engine	20	3.23	1.55	0.94	217.70	239.88
Swimming in the sea	39	6.29	2.00	1.30	4.08	12.45
Water skiing/jet skiing	14	2.26	1.50	0.85	111.43	88.24
Surfing/sail boarding/kite surfing/paddle boarding/ surf kayaking	22	3.55	1.41	1.30	93.86	72.46
Scuba diving/snorkelling	4	0.65	1.75	0.50	67.75	62.02
Other sea sports	5	0.81	1.20	0.45	105.00	62.25
Walking/running along the coast/beach/cliffs/etc.	165	26.61	2.47	2.07	22.18	74.64
Cycling along the coast	74	11.94	2.15	1.51	60.15	66.29
Climbing, bouldering and coasteering at the coast	14	2.26	1.29	0.61	34.64	37.85
Beach games/classes (e.g. yoga, boot camp)	4	0.65	3.25	2.63	8.75	14.36
Whale/dolphin watching	33	5.32	1.30	0.68	24.58	30.06
Bird and wildlife watching in coastal areas	19	3.06	1.21	0.42	11.95	24.76
Visiting nature reserves etc. in coastal areas	103	16.61	2.04	1.31	56.00	56.55
Other trips to the beach or seaside	115	18.55	2.10	1.25	46.23	54.24
Other trips to the islands	98	15.81	1.63	0.84	100.27	76.62
Any other sightseeing trip where the proximity to the sea was a necessity	123	19.84	3.24	2.90	50.33	59.92
None of the above	239	38.54				

Appendix 2.
Marine and Coastal Activities by Number of Participants by County

	Clare	Cork	Donegal	Dublin	Galway	Kerry	Kilkenny	Leitrim	Limerick	Louth	Mayo	Meath	Sligo	Waterford	Wexford	Wicklow	Grand Total
Angling boat	0	5	1	0	5	3	0	0	1	0	0	0	0	0	0	0	15
Angling shore	3	2	3	1	2	3	0	0	0	0	0	0	0	0	0	0	14
Beach games	0	0	0	2	1	1	0	0	0	0	0	0	0	1	0	0	5
Bike	21	2	1	6	23	37	1	0	3	0	1	0	0	1	0	0	96
Boating no power	1	6	1	2	5	2	0	0	0	0	0	0	2	3	0	0	22
Boating power	2	2	3	2	1	7	0	0	0	0	0	0	3	0	0	0	20
Coasteering	2	0	2	3	5	1	0	0	0	0	1	0	0	1	0	0	15
Dive	1	0	1	0	0	0	0	0	0	0	0	0	0	1	0	0	3
Islands trip	17	6	4	0	28	18	4	0	1	0	16	1	0	5	0	2	102
Nature reserve	28	9	3	1	40	36	2	0	1	0	6	0	1	2	0	4	133
Other (beach)	34	6	2	1	39	44	7	0	1	0	4	0	1	3	1	1	144
Other sea sport	0	1	1	0	1	1	0	0	0	0	0	0	0	1	1	0	6
Other sightseeing	36	9	7	3	58	59	4	0	3	0	16	0	4	6	0	1	206
Sailing	1	1	2	3	2	1	0	0	0	0	0	0	1	3	0	0	14
Surfing	5	3	3	1	4	2	0	0	0	0	0	0	5	1	0	0	24
Swim	11	3	0	2	7	27	0	0	0	0	1	0	0	1	0	0	52
Walking	40	19	10	17	70	49	2	0	4	0	13	0	1	9	1	5	240
Water ski	1	1	1	0	4	3	0	0	0	0	0	0	3	2	0	0	15
Whale watch	3	0	2	0	4	18	0	0	0	0	9	0	0	0	0	0	36
Wildlife watch	4	2	0	0	7	5	0	0	0	0	2	0	0	1	0	0	21
Grand Total	210	77	47	44	306	317	20	0	14	0	69	1	21	41	3	13	1183

Socio-Economic Marine Research Unit
National University of Ireland Galway
Tel: +353 (0)91 493105

E-mail: stephen.hynes@nuigalway.ie
Web: www.nuigalway.ie/semru/

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