



OLLSCOIL NA GAILLIMHÉ  
UNIVERSITY OF GALWAY

# A Survey of Marine and Coastal Recreational Tourism Providers



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### Contributors & Acknowledgements

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*Foras na Mara*  
*Marine Institute*

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SEMRU was established through the Beaufort Award in 2008. Since then, it has developed into the foremost marine economic analysis centre in Ireland. The research of the unit is interdisciplinary in nature and focuses on the economic importance of coastal and offshore marine environments. This involves examining the economic utility of the marine environment and the ecological value derived from the productivity of associated ecosystems.

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# Executive Summary

**In 2023, SEMRU surveyed marine and coastal recreational tourism providers as part of the Usage of Irish Seas and Coastal Ecosystems for Tourism Development (UISCE Tourism) project. The study examined the marine and coastal recreational tourism market from the perspective of service providers. To meet this aim, data was collected from 60 owners and/or operators of marine and coastal recreational businesses in the Republic of Ireland through a combination of face-to-face interviews and self-administered online surveys.**

The results suggest that although most businesses in the marine and coastal recreational tourism sector are seasonal, 38% operate all year round. At the same time, 90% of the sample stated that July and August were the key months of their season. The sampled businesses provided their customers with the opportunity to undertake numerous activities. The most common category was water sports activities like surfing, sea kayaking and sailing, the second most common was wildlife watching.

The responses of the business owners and operators also suggest the use of multiple marine and coastal landscape features. The average respondent interacted with four or more different types of natural marine or coastal features including “Coastal waters” (73%), “Beaches” (62%) and the “Shoreline” (62%) on trips with their customers. However, there was somewhat of a mixed response in relation to the quality of the man-made infrastructures at the locations their businesses used with 37% rating them as “Good” or “Very Good”, 42% rating them as “Bad” or “Very Bad” and the remainder rating them as “Neither Good nor Bad”. The most commonly cited issue in relation to man-made infrastructure was accessibility to marine resources for their customers.

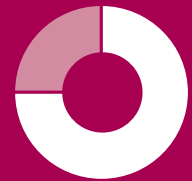
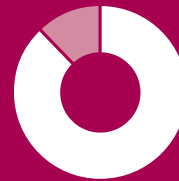
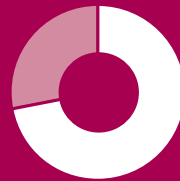
Customers of the marine and coastal recreational businesses sampled tended to use a wide variety of other local services. For example, local accommodation was used “Always” or “Frequently” by 72% of their customers, local food or drink providers were used “Always” or “Frequently” by 88% of their customers and local shops were used “Always” or “Frequently” by 75% of their customers. Likewise, these businesses are important as sources of employment in rural areas, as the average sampled business hired 7.3 members of staff in 2022. However, this is down from 7.8 members of staff in 2019. The effects of COVID-19 and the related restrictions were also apparent in the finances of the sampled businesses. The average turnover of the marine and coastal recreational business in this sample was €119,981 in 2022, 10% lower than in 2019 when it was €133,896. After adjusting for inflation, this loss is 21% in real terms.

Looking more directly at the COVID-19 period, nearly half of the respondents stated that their business was in danger of permanently shutting down due to the associated restrictions. However, approximately 60% of the sample received one or more forms of government assistance during the pandemic, which supported the continuation of their business. At the same time, smaller businesses stated that they found it more difficult to obtain financial assistance. As such, opinions on the government’s handling of the pandemic were split but favour a positive response as 49% rated the government’s handling as “Good” or “Very Good”, 25% rated it as “Neither Good Nor Bad” and the remainder rated it as “Bad” or “Very Bad”.

In consideration of the future of the sector, some of the most pressing issues highlighted by respondents were “Reduced domestic tourism demand due to rising cost of living”, “Difficulty getting adequately trained staff”, “Higher cost of labour”, “Insurance costs” and “Availability of accommodation for clients”. However, on average, respondents indicated that their businesses were, on a scale from 1 to 10, an 8.8 in terms of the likelihood of their business surviving the next 12 months.

## Marine and Coastal Recreational Businesses

**3.2** Number of services the average business offers



**3.6** Number of natural marine and coastal features used by the average business

**72%**  
Customers that used local accommodation

**88%**  
Customers that bought food and drink locally

**75%**  
Customers that used local shops



The most common activity offered is water sports which includes **surfing, sea kayaking** and **sailing**. The second most common is **wildlife watching**.

**8.8/10**

Likelihood of staying open for the next 12 months

**21%**

Percentage turnover was down in real terms in 2022 compared to 2019

The average business hired **7.3 members** of staff in 2022, **64% percent of all staff were male** and **36% were female**.



The above statistics are based on a 2023 survey of 60 marine and coastal recreational tourism businesses. These surveys were conducted as part of the Usage of Irish Seas and Coastal Ecosystems for Tourism Development (UISCE Tourism) project. UISCE Tourism aims to model, analyse and describe marine and coastal tourism and recreational tourism businesses in the coastal regions of the Republic of Ireland. More information about UISCE Tourism can be found at the following address [https://www.universityofgalway.ie/semru/research/current\\_projects/uisce\\_tourism/](https://www.universityofgalway.ie/semru/research/current_projects/uisce_tourism/)

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## 1. Introduction

Marine and coastal tourism is a vital component of both the Irish tourism sector and Ireland's ocean economy. A recent report published by the Marine Institute and the Socio-Economic Marine Research Unit (SEMURU) (Reilly et al. 2023) estimated that, in 2022, marine and coastal tourism generated €1.2 billion in turnover, making it the third largest, in terms of revenue, of all of Ireland's ocean sectors. In terms of employment, marine and coastal tourism is a much larger contributor to the ocean economy, employing 18,325 people in 2022, more than all of the other ocean economy sectors combined. Likewise, marine and coastal tourism is one of the largest components of Ireland's tourism sector accounting for approximately 43% of total overseas expenditure (Hynes et al. 2019) and 44% of the total domestic expenditure in 2018 (Hynes et al. 2020). Despite this, to date, there has been relatively little information collected on the recreational businesses that operate in Ireland's coastal areas and that use Irish coastal waters.

Marine and coastal recreational businesses are enterprises that offer recreational activities that require proximity to the sea. These can be coastal activities such as gorge walking, coastering and beach combing or marine activities such as sea angling, kayaking and sailing. Businesses that belong to the marine and coastal recreational tourism sector include surf schools, Scuba diving centres and boat tour operators. The Marine Institute estimated that 260 such businesses operated in the Republic of Ireland in 2020, many of which are in rural areas where tourism is an important aspect of the local economy. As such, these activity providers add to the tourist offering for these regions, provide valuable employment and help to create an environment in which other businesses like cafés, pubs and accommodation providers can benefit from.

However, marine and coastal recreational tourism operators, like many others, have faced many challenges over the last number of years. COVID-19 and the related restrictions in 2020-2021, Ireland's accommodation crisis and the use of hotel beds to cater for the large influx of people seeking emergency accommodation, since February 2022 in particular, have all affected this sector. With the benefits these businesses offer to the Irish economy and the challenges they face in mind,



this report examines how Irish marine and coastal recreational businesses operate, their interactions with and knowledge of the marine environment, employment and employment related issues, their finances, how they were impacted by COVID-19 and the related restrictions and their outlook for the future of the sector over the next 12-month period. In doing so, this report will be split into several sections. Section 2 presents a brief literature review to give context to this report. Section 3 discusses the data that was collected, from whom it was collected and how it was collected. Section 4 presents the results of the data analysis. This section is divided into five themes: i. The respondents and their business, ii. Normal business operations, iii. Interaction with the natural and built blue environment. iv. Connection to local communities. v. Staffing, finances and COVID-19 and finally, vi. Outlook for the future of the sector. The conclusions section offers some final policy suggestions which have been informed by a review of current policy and the conversations with the marine and coastal recreational business owners and operators during the collection of responses to the survey used in this report.

## 2. Previous research on marine and coastal tourism in Ireland

There have been a number of publications on aspects of marine and coastal tourism in Ireland. In addition to the previously mentioned reports (Reilly et al. 2023; Hynes et al. 2019, 2020) academic papers have been published using demand analysis for marine and coastal tourism (Deely et al. 2022, 2023) and for water-based activities (Whelan 1997; Curtis and Hynes 2017). There have also been several publications on specific marine activities which include intertidal kayaking (Alducci and Hynes 2023), sea angling (Hynes et al. 2017; Grilli et al. 2018; Ryan et al. 2021), coastal walks (Barry et al. 2011) and, recently, the potential for basking shark tourism in Donegal (Gray et al. 2021). Marchant and Mottiar (2011) have also previously examined what they referred to as 'surf tourism lifestyle entrepreneurs' in Ireland. For her PhD thesis, Ginty (2010) also examined marine and coastal recreational businesses in the west of Ireland and assessed their perspectives on available supports for their sector and their access to coastal infrastructure. Amongst Ginty's finding, she stated that, at the time, there was no lead agency responsible for both product development and marketing of the Irish marine tourism business sector. This is still true today, although assistance for product development and indeed promotion can be found through Fáilte Ireland and government initiatives.

A number of earlier reports were also produced focused on the infrastructural demands for the supply of marine recreational activities (Marine Institute 1999, 2001, 2006). These reports looked at investments that would support marine and water-based activities in Ireland. The two earlier documents, published in 1999 and 2001, suggested investment and infrastructure strategies for water-based and marine recreational activities. In 2006, the Marine Institute published an audit of the water-based tourism product in Ireland, noting the relative geographic advantages Ireland has over other nations.

Since the publication of these reports there has been a substantial change in the policies and strategies that drive marine and coastal tourism development in Ireland. Previously, it was noted that marine tourism had been developed on an ad-hoc basis (Marine Institute 1999). Today a more holistic approach is taken. This can be seen in the documents *Harnessing Our Ocean Wealth* (Inter-Departmental Marine Coordination Group 2012) and, more recently, the *National Marine Planning Framework* (Department of Housing, Planning and Local Government 2021). These documents recognise that all elements of the marine sector are interlinked and need to be developed and managed in a holistic manner<sup>1</sup>. Given marine and coastal recreational tourism is an important part of the broader tourism industry, particularly in rural areas, and is dependent on natural marine resources, it is important to have a good overview of the activities of this sector, the ecosystems they operate in and the challenges they face. This report aims to help fill that knowledge gap.

1. The UISCE Tourism Project has produced a comprehensive review of the evolution of marine tourism strategies in Ireland with international benchmarking. The project also produced a database with web links to both national and regional level Marine and Coastal Tourism Strategies. These can be downloaded from [https://www.universityofgalway.ie/semru/research/current\\_projects/uisce\\_tourism/](https://www.universityofgalway.ie/semru/research/current_projects/uisce_tourism/)

### 3. Data collection

The marine and coastal tourism sector contains a variety of disparate elements. In addition to recreational tourism businesses, the marine and coastal tourism sector also includes coastal hotels, cafés, pubs, marinas and shops related to coastal activities. The focus of this report is operators within the marine and coastal tourism sector that offer marine recreational opportunities to their clients.

These businesses were selected because of the need to understand how current and past issues have, and continue to, affect this sector in a way that could, if left unchecked, have ongoing repercussions that may affect Irish tourism as a whole. Additionally, these businesses provide many Irish residents with their first introduction to the marine environment. As such, interactions between these businesses, their staff and their customers may become a template for how visitors will interact with the marine and coastal environment throughout their lives. Therefore, an examination of marine and coastal recreational businesses' understanding of the natural environment is essential for the preservation of Ireland's marine and coastal resources. Finally, it was felt that this sector as a whole has received less attention than some, but not all, of the other types of businesses within marine and coastal tourism.

It is worth noting that businesses within the tourism sector do not always fit perfectly into a clearly defined category. For example, a business may provide marine recreational activities as well as provide accommodation or operate a café in a coastal location. As such, a criterion for inclusion was that a large portion of each business's operations must be dedicated to marine or coastal recreational activities. Businesses that also include activities inland or sell equipment could be included if it was clear that one of the business's primary selling points to potential customers was marine and coastal recreational activities. The business must also cater to tourists and operate in the Republic of Ireland. There are approximately two hundred businesses that meet these criteria in the Republic of Ireland.<sup>2</sup>

#### Survey design

The initial stage of survey design required a desk review of Irish marine and coastal policy and similar studies completed elsewhere. Of particular note is the Scottish Marine Recreational Business survey conducted in 2015 (Marine Scotland 2016). From this desk review, a first draft of the survey was designed. Subsequently, academics with expertise in survey design and professionals with a practical background in the marine and coastal recreational sector were invited to make comments. This resulted in the survey questionnaire that was used for the pilot study, which was conducted in December of 2022. During the pilot stage, several face-to-face, in-person, interviews were conducted in which respondents were asked, in addition to the survey questions, about their ability to answer the questions being presented and how well they thought the questions addressed the study goals. These discussions with the pilot study respondents allowed for a critical evaluation of the survey questions in relation to the wording, complexity and relevance of each question for the target population of Irish marine and coastal recreational businesses. Following the pilot study, changes were made to the survey questions reflecting the information given by the respondents.

#### Data collection

Target businesses were identified using a number of sources. Firstly, Ireland's Association for Adventure Tourism (IAAT) provided a list of relevant members operating in the marine and coastal recreational space. IAAT also sent out an email to their members urging them to take part in the survey. Companies were also identified using the [Marine Ireland Industry Network Business Directory](#). Pre-existing links between SEMRU and marine and coastal recreational businesses were also leveraged to gain more responses. Additionally, social events were attended where potential respondents were approached.

2. The criteria for inclusion are somewhat stricter than that of the Marine Institute leading to a difference in their estimate of marine and coastal recreational business and those deemed acceptable to include in this survey.



Potential respondents were contacted between one to three times via email with an explanatory message outlining the aims of the project, its importance to the sector and how data collection was to be conducted. Within these emails and again during the survey, respondents were guaranteed anonymity. As such, no individual business or respondent is identified in this report. In an effort to gain as many responses as possible, data collection took place during off-peak times of the year for the business operators. However, it is worth recognising that many of the business owners and operators in this sector have a second job outside of the peak season and therefore may not have any extra time to take part in a survey even outside of the main season.

Data were collected using two mediums and surveys of two lengths. Data from the longer of the two surveys was collected through face-to-face interviews either using Zoom telecommunication software or in person. This method of data collection allowed, in addition to the survey questions, the ability to discuss the respondent's experiences as a recreational tourism provider. Additional questions were asked on an ad-hoc basis in response to comments made by respondents in the face-to-face interviews. This additional information provides valuable insight into the data collected and has greatly informed this report. This ability to collect additional data reflects one of the major advantages of conducting face-to-face interviews. Data collection for the face-to-face interviews took place in April and May of 2023. Data collection was then paused for the peak tourism season and resumed in September 2023, running until November 2023. Forty-nine respondents completed the survey via Zoom or in person.

To increase the number of respondents, a second method of data collection was used combined with a shorter survey. This version was to be self-administered by the respondents using Qualtrics, an online surveying platform. A second version of the survey instrument was created for this as some of the questions asked in the original survey tended to require additional explanation by the interviewer to be answered. This second stage of data collection was undertaken in December of 2023 and garnered 11 responses.

In total 199 businesses were contacted. This included several businesses that had ceased to operate but whose views were still of interest to this report. Sixty businesses undertook the survey giving a response rate of 30%. However, not all respondents answered each question. This is in part due to the use of a shorter self-administered survey and some respondents not wishing to answer questions addressing financial matters. Consequently, at the top right corner of each figure the sample size (n = x) is given.



## 4. Results

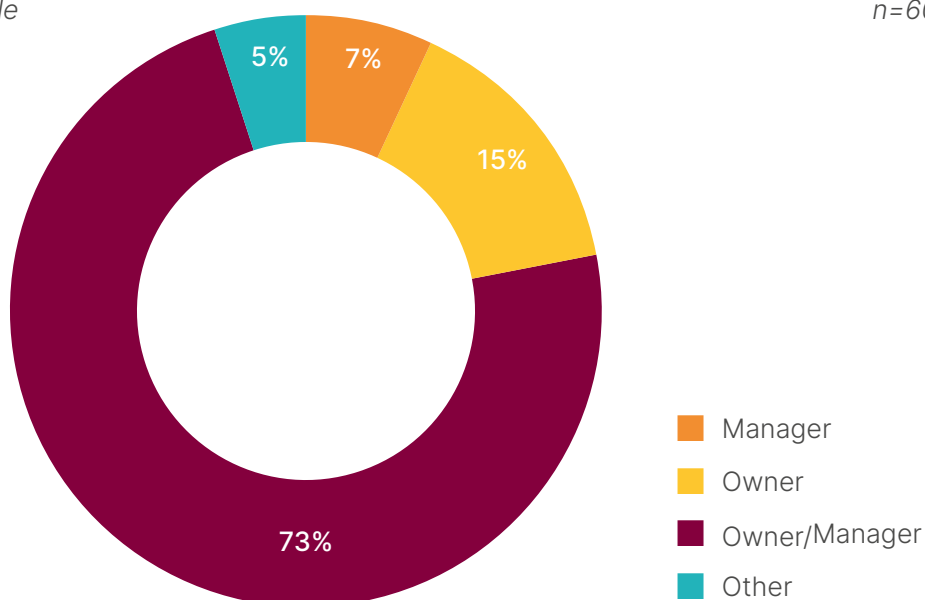
The questions in the survey were grouped into seven sections for analysis. Each section aims to address a distinct component of the marine and coastal recreational sector. The analysis includes both quantitative and qualitative elements. As previously mentioned, respondents often discussed their answers during data collection. This allowed for a better understanding of the information given. As such, the insights gained from the discussions between the interviewer and the respondents are shared where appropriate.

### The respondents and their businesses

The survey began with a series of questions to get a better understanding of the respondents and their businesses. The first question asked what position the respondent held within the business (Figure 1). The vast majority of the respondents classified themselves as having the dual title of owner/manager (73%). Another 7% classified himself or herself as a manager and 15% classified themselves as owners. Some individuals (5%) selected the “other” option. Almost all of these “other” respondents were also owner/manager but also wished to include other job titles, most prominently, skipper.

**Figure 1:** Preferred Job Title

*n*=60

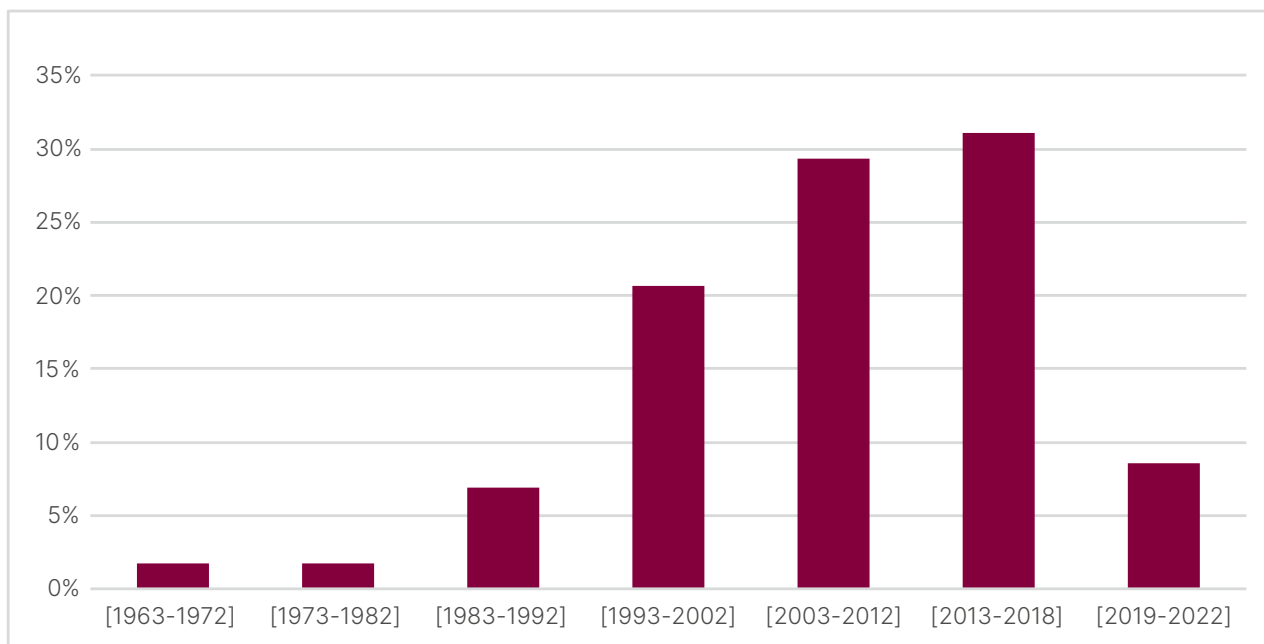


Next, respondents were asked when their business was established. Of the businesses surveyed, the average year of establishment was 2006, with the oldest starting in 1963 and the most recent in 2022 (Figure 2). It is important to point out that some of these businesses did not exist during the COVID-19 pandemic. Consequently, some respondents were unable to answer questions related to COVID-19 and the restrictions imposed to curb the spread of infection. It is also noteworthy that one of the businesses ceased to operate in 2021 and another pivoted their business during this period.<sup>3</sup>

3. Businesses that ceased to operate during and after the pandemic were also contacted as their insights on how the pandemic was handled could provide a unique perspective that would have enriched this analysis. However, they chose not to complete the survey.

**Figure 2:** Establishment Date of Business

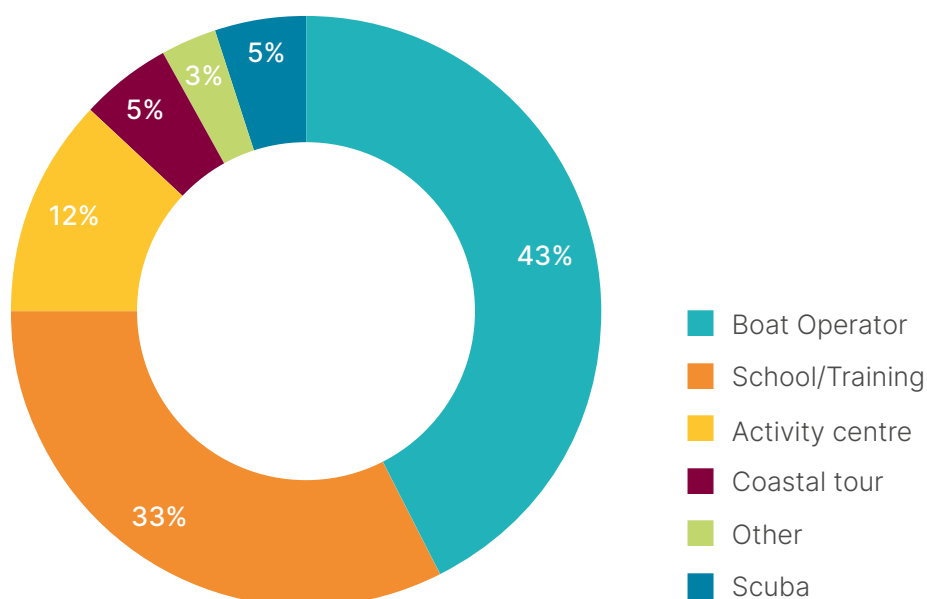
n=58



In Figure 3, the surveyed businesses are broadly categorised into one of six categories based on the most prominent activities the business undertakes. The category that the largest percentage of respondents falls into is “boat operator” comprising 43% of the sample. These include boat tours or cruises, wildlife watching, sea angling and access to Scuba diving sites. Although this is a wide range of activities that may be attractive to different tourist groups, it is the case that many of the businesses in the “boat operator” category offer many and sometimes all of these services to their customers. A third of the sample could be categorised as “school/training” businesses. These businesses offer lessons in marine activities; most commonly, surfing, kayaking and sailing. “activity centres” make up 12% of the sample. Businesses in this category offer a wide range of activities such as gorge walking, raft building, kayaking, etc. and may also include a water park. The remainder of the sample is made up of those offering Scuba diving services, coastal walking or equestrian tours and an “other” category for all other businesses.

**Figure 3:** Businesses by Types

n=58





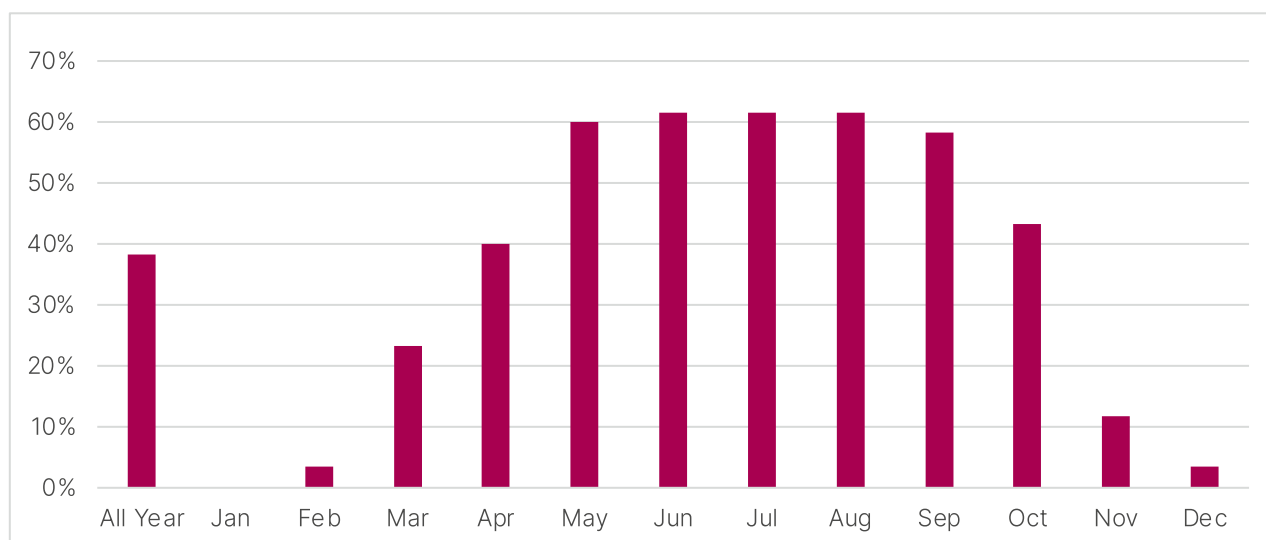
It is also worth highlighting that the respondents represent businesses with very different scales of operation. Some businesses operate solely in the summer season with no additional employees other than the respondent. The respondents related to these businesses often had an additional full-time job. Other businesses operate all year but, again, employ no staff, although this can be for a variety of reasons which will be discussed in a later section. Others are larger operations employing tens of employees each year. Consequently, in the following sections, it is worth keeping in mind that these are not a homogenous group of businesses. Rather, these are, in some respects, very different businesses working within the same sector.

### Normal business operations

In this section of the survey, businesses were asked several questions in relation to the day-to-day operations of their business. The first of these questions asked which months the respondent's business normally operates. Of the businesses interviewed, 38% said they operated all year round (Figure 4). However, through discussions with respondents it seems that, in the shoulder months, particularly into the winter months, some of these businesses may only operate a few days a month. If, for example, a customer contacts a business during the shoulder season asking if they are willing to take them out on a given day, many of these businesses will operate if the weather permits. However, these types of ad-hoc business activities are very unpredictable and do not offer a stable source of income.

**Figure 4:** Normal Operating Months

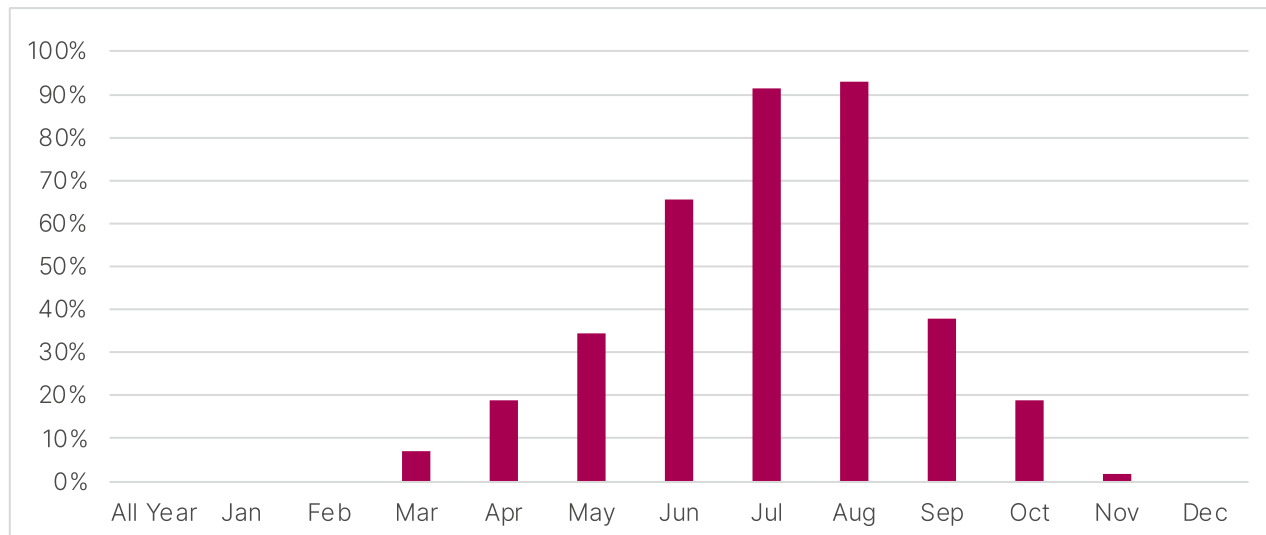
n=60



Next respondents were asked about their peak operating months. As can be seen in Figure 5, more than 90% of respondents stated that July and August are amongst their peak season. This was particularly significant for respondents who took part in the survey after the summer period. Due to the unusually inclement weather in July and August of 2023, several respondents stated that they had to cancel half of all booked trips. This, of course, will not be true of all types of activity providers or in all geographic locations but is true of some of the respondents. As such, a continuation of weather that is unconducive to marine recreational activities during future peak seasons will require adaptation from these businesses.

**Figure 5: Peak Operating Months**

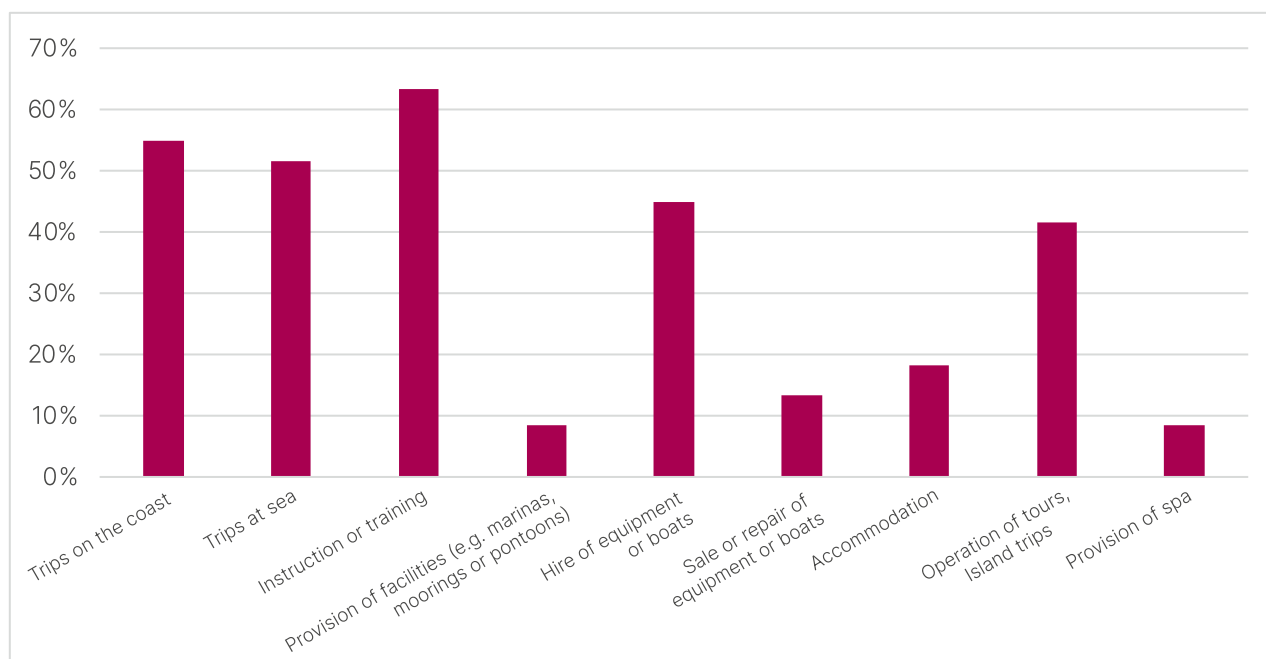
n=59



Respondents were then asked to indicate the types of services they provide to their clients. Many of the businesses provided more than one type of service, with the average respondent selecting 3.3 services. Approximately, a quarter of the businesses selected two of the options, 23% selected three options and almost 40% selected four or more options with one respondent selecting eight different types of services. In many cases, these businesses undertook a single activity e.g. surfing, but this may involve an organised or led trip by the coast or at sea, instruction or training and the hiring or sale of equipment. It is easy then to see how so many businesses offer a multitude of services and the consequent demands on these businesses and their staff.

As can be seen in Figure 6, the most often selected service was “instruction or training in coastal or marine recreation” which was selected by 63% of respondents. The selection of this option did not necessarily mean that the business was dedicated to training of some sort. Often, as a part of the activities the business undertakes, some amount of training is required, e.g. a customer may be instructed on how to use a life jacket, how to enter/exit a canoe, what to do if the kayak capsizes, etc. Of course, some respondents’ businesses focused on training to a much greater degree like Scuba diving and surfing schools.

**Figure 6: Percentage of Marine Leisure Operators Stating that they Offer Particular Services** n=60

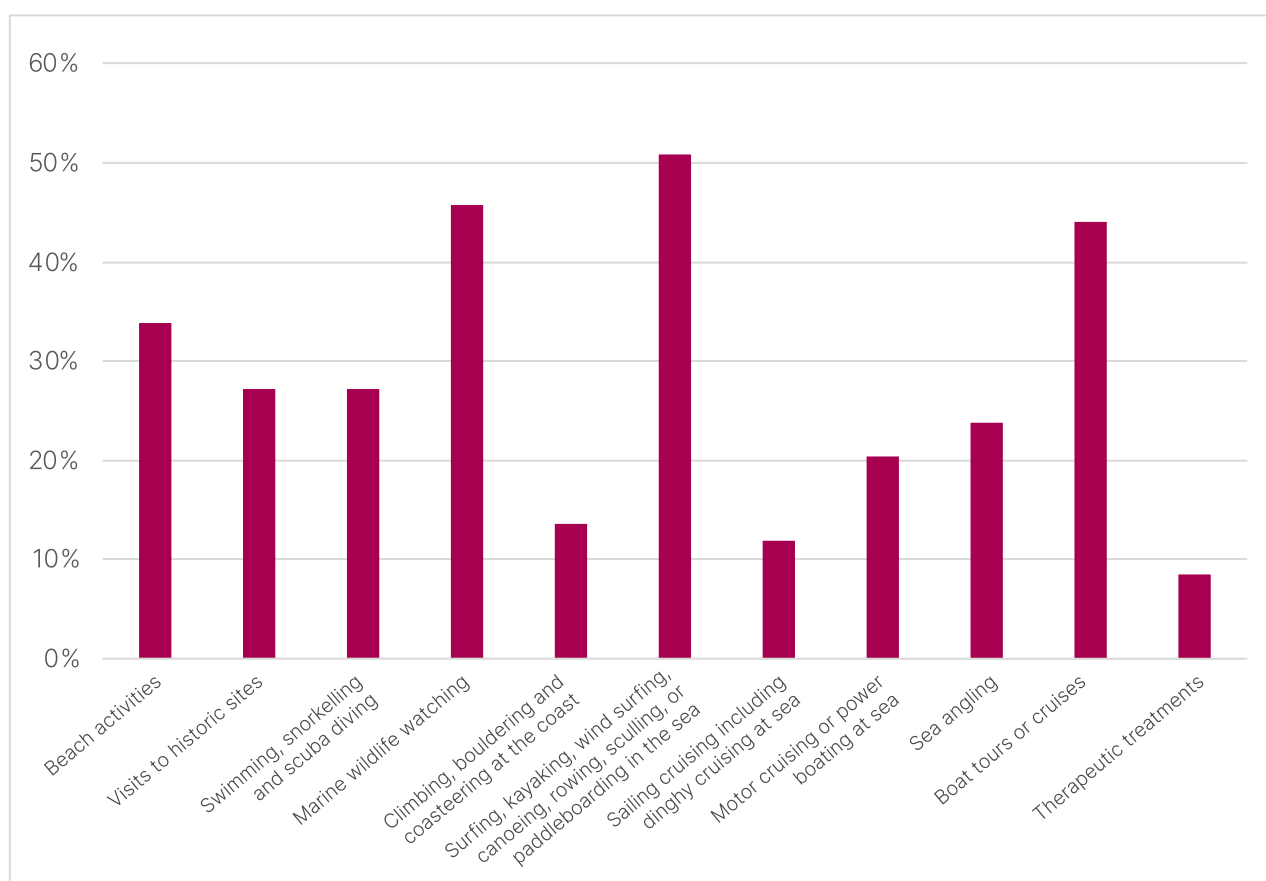


**Note:** not all options available to the respondent are displayed in the graph, only the services chosen by five or more respondents.

Following the question about services, respondents were asked which activities they offer their customers. In comparison to services, respondents selected slightly fewer sets of activities, averaging 3.2 sets per business. Sixty-five percent of respondents selected one to three activity sets with 23% selecting a single activity set. Two respondents selected nine activity sets. The set that the respondents selected most often was “surfing, windsurfing, canoeing, rowing, sculling, kayaking or paddle boarding” (Figure 7). Through discussion with respondents, it was apparent that surfing and kayaking are the two activities that businesses offer most often. However, it is worth acknowledging that a number of the surf schools that responded to the survey had previous informal connections with SEMRU, which may have led to a slight over-representation of this type of business. On the other hand, it is unquestionably true that surf schools are some of the most numerous marine recreational businesses in Ireland, particularly along the west coast. The second most commonly selected activity set was marine wildlife watching. This activity set was chosen by businesses in which wildlife watching was the principal activity of their business, e.g. whale watching. However, it was also chosen by businesses where wildlife watching was a core component of their business but not always their principal activity. For example, kayaking tours, sea angling and adventure centre businesses all selected this activity set. This suggests the importance of marine wildlife health and abundance to a wide range of marine and coastal recreational businesses, not solely wildlife tour operators.

**Figure 7:** Percentage of Marine Leisure Operators Stating that they Provide Particular Activity Sets

n=59



A number of activity sets were not selected or selected by a very small number of businesses. These include the activity sets “yachting, power kiting, and kite bugging at the coast”, “water skiing, wakeboarding or jet skiing in the sea” and “dinghy or yacht racing at sea”. However, this does not necessarily reflect a lack of demand for such activities in Ireland. Rather, businesses were unable to get insured for these activities and as such their low incidence may signify a failure in the market that detrimentally affects tourism providers, tourists and the product offering for Ireland as a whole.



This thinking was reflected in the follow-up question in which respondents were asked what activities they would like to be able to provide to their customers but could not.

Amongst the services that respondents wished to offer but could not were better provisioning of food, drinks and accommodation. However, more frequently, respondents suggested activities that they believe would be beneficial to both their business and their customers but cannot offer due to, as previously stated, an inability to acquire insurance. Some examples listed by the respondents include: jet skiing, rock climbing and windsurfing. It seemed, in discussion with the respondents, that there is a belief that there would be a demand for these activities by tourists if marine and coastal recreational businesses could provide them.

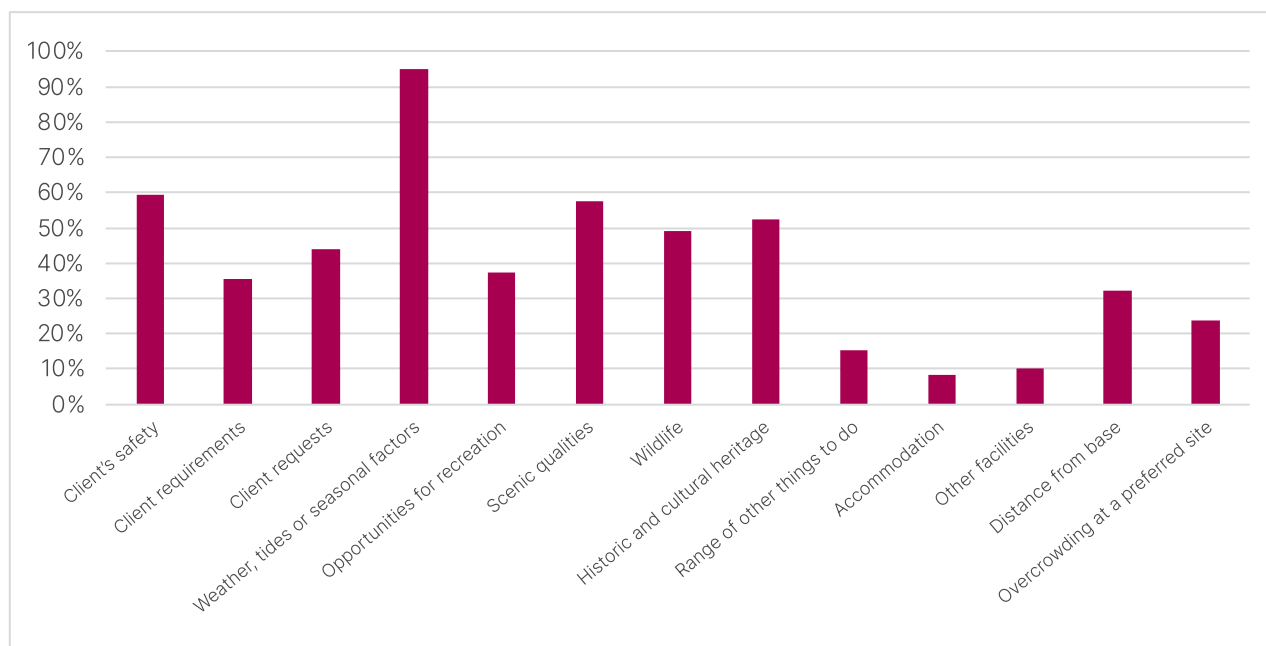
Respondents were also asked, what percentage of their activities were marine based, coastal or other. In answering this question respondents were given the following definition for a marine based activity, “an activity in which either you or the equipment you are using makes contact with the ocean”. Coastal activities are those activities that take place along the shore that do not involve contact with the ocean. By construction, most of the activities undertaken were marine (79%). Somewhat surprisingly, “other activities” which are river or lake activities make up 13% of the sample whereas coastal activities account for 7%. This, to some extent, reflects businesses that provide their customers inland water activities or marine activities but do not participate in coastal activities. Some examples include kayaking businesses where customers are either out in the ocean or in rivers or lakes, and some activity centres that provide inland activity on their own grounds or marine activities but no coastal activities. In the case of kayaking, rivers such as the Corrib in Galway provide operators with a sheltered alternative where clients can be brought kayaking if conditions are too rough to go to sea. This can result in fewer cancellations and loss of income.

Next respondents were asked what factors impact their choice of location when taking customers on organised trips. This choice was impacted by a variety of factors, with the average respondent selecting 5.3 factors. The most often chosen factor was “weather conditions, tides or seasonal factors”, selected by 95% of the sample (Figure 8). This factor can influence the location chosen on a given day as well as departure times, as departure times are often affected by the tidal cycle. As discussed previously, weather conditions can also result in the cancellation of trips. This, of course, is highly dependent on the type of activities being offered and whether the business has the opportunity to offer more sheltered locations to recreate in, like the example given of sea kayakers in Galway. Although not directly asked of the respondents within the survey, several respondents did discuss changing weather from year to year and how this has negatively affected their business. Likewise, several respondents discussed the drop in wildlife species and the number of individual species in the locations their business uses.



**Figure 8:** Percentage of Marine Leisure Operators Stating that Certain Factors Influence Organised Trips

n=59



Accommodation was the least selected option because customers will, in most cases, already have accommodation before they take part in the recreational activity. As the customers' accommodation needs had already been met, respondents rarely had to consider this while planning the activity. However, although accommodation does not affect decisions concerning a singular activity, it has a major impact on the amount of tourism that comes to a region and, therefore, to the respondent's business. As such, it was of major concern for many of the respondents. This will be discussed in a later section.

### Interactions with the natural and built blue environment

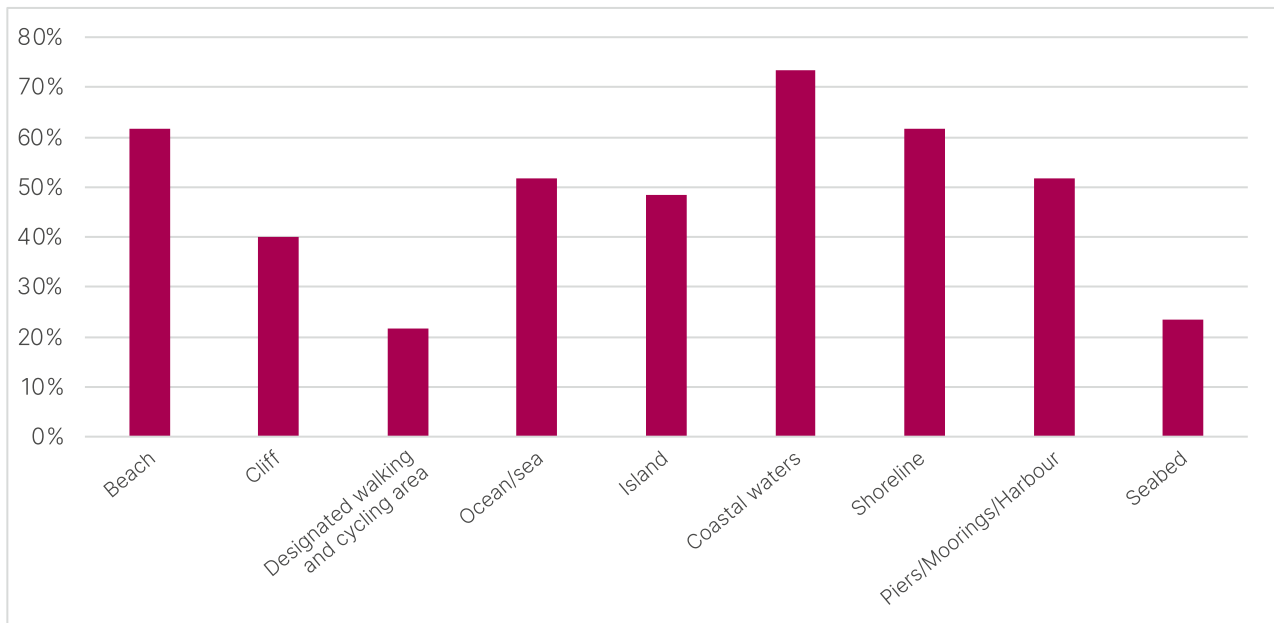
The 'natural' blue environment, which includes the ocean and marine features such as cliffs, islands and coastlines, as well as the built blue environment, which includes piers, moorings and harbours, are the cornerstones of marine recreational businesses. As such, this survey aims to develop a better understanding of the respondents' interactions with these environments, their knowledge in relation to the habitats near the sites they use most often and how they would describe the man-made infrastructure at these sites.

At the start of this section of the survey instrument, respondents were asked what features their businesses used. Almost all businesses selected more than one feature (95%) with the average business selecting 4.4 features. What proves to be more interesting is that many businesses selected features that they do not make contact with. It would seem that the features that neither the customer nor the instructors/guides make contact with are sometimes viewed as being part of the tourism offering of their business. A good example of this is the feature "cliff". Few businesses include climbing cliffs as part of their product offering but many view this feature as adding to their businesses' product as they can point out geographic or natural points of interest such as nesting birds. This adds to the particular offering their business can provide to customers that they may not be able to receive elsewhere.

"Coastal waters" was the most commonly chosen feature, selected by 74% of the respondents (Figure 9). Respondents also frequently chose features that can provide both places of recreation and operate as a bridge way to other marine locations. These features include "beaches" and "shorelines". The least frequently chosen feature was "designated walking and cycling areas". However, although

this feature was seldom chosen by the respondents of this survey due to the types of activities that they provide, previous research has shown that these features are in wide use by tourists in Ireland (Hynes et al. 2019, 2020). It is also still worth observing that each feature was selected by more than one-fifth of the sample. This suggests that good use is being made of Ireland’s natural and man-made marine and coastal resources.

**Figure 9:** Percentage of Marine Leisure Operators Stating that they Use Particular Features n=60



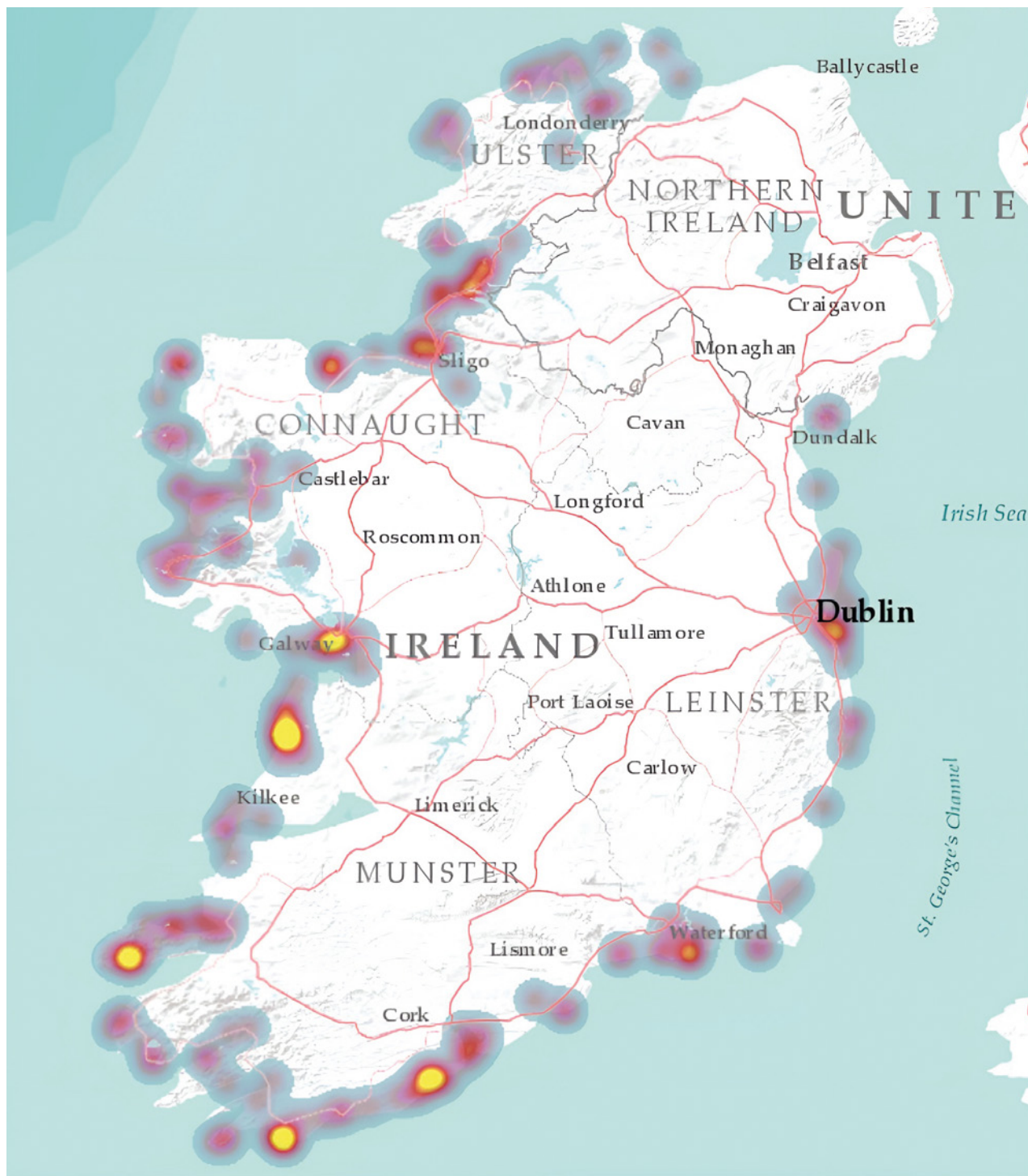
Following this, respondents were asked to complete a simple mapping task where they highlighted the areas their business uses. The map below shows these responses. To enrich the mapping exercise, using the Marine Institute data base, marine and coastal business websites were combed for information on the locations and activities of non-participating businesses. If information was provided this was added to the data base used to create the various figures below. As such, the maps below include information from participating and non-participating businesses. This however is not a complete reflection of all areas used or all businesses, just those available to the researchers.

Figure 10 provides a heat map of businesses whose core business offering is marine and coastal recreation. From the information accessible to the researchers this is approximately 180 operating businesses. It is worth noting that this map does not necessarily depict where marine and coastal recreation takes place, rather it is a map of the registered location of each business.





**Figure 10:** Heat Map of Locations of Marine and Coastal Recreational Businesses



**Source:** ESRI, World Topographic Map

As can be seen in Figure 10, there is a sizable difference between the east and west coasts. The frequency of these types of businesses is much greater on the west coast. Even in Dublin, where the greatest number of tourists arrive each year, the density of marine and coastal recreational businesses is sparse in comparison to smaller more remote areas like Lahinch, in county Clare, Kinsale in county Cork and Dingle in county Kerry. This difference is likely due to the suitability of the western coast to marine activities such as surfing as well as a tradition of boating pursuits. Equally, the abundance of wildlife watching opportunities off the coast of Cork adds to the relative dominance of marine and coastal recreational businesses on the west coast as opposed to the east. The attraction

of the west coast for marine related tourism activities was also observed on the demand side in previous research that surveyed overseas and domestic tourists in Ireland (Hynes et al., 2019, 2020).

Figure 11 shows the piers, quays and slipways across the Republic of Ireland and by extension the availability of these resources to marine and coastal recreational business and potential businesses. A greater abundance of each of these types of structures can be seen on the west coast in comparison to the east, with high numbers of quays in Galway, Cork and Kerry and a larger number of piers in Donegal. However, as noted by respondents, the abundance of these structures does not indicate quality. As will be discussed later, many of the piers, quays and slipways used by the respondents of this survey are in need of some form of upgrading.

**Figure 11:** Locations of Piers, Quays and Slipways

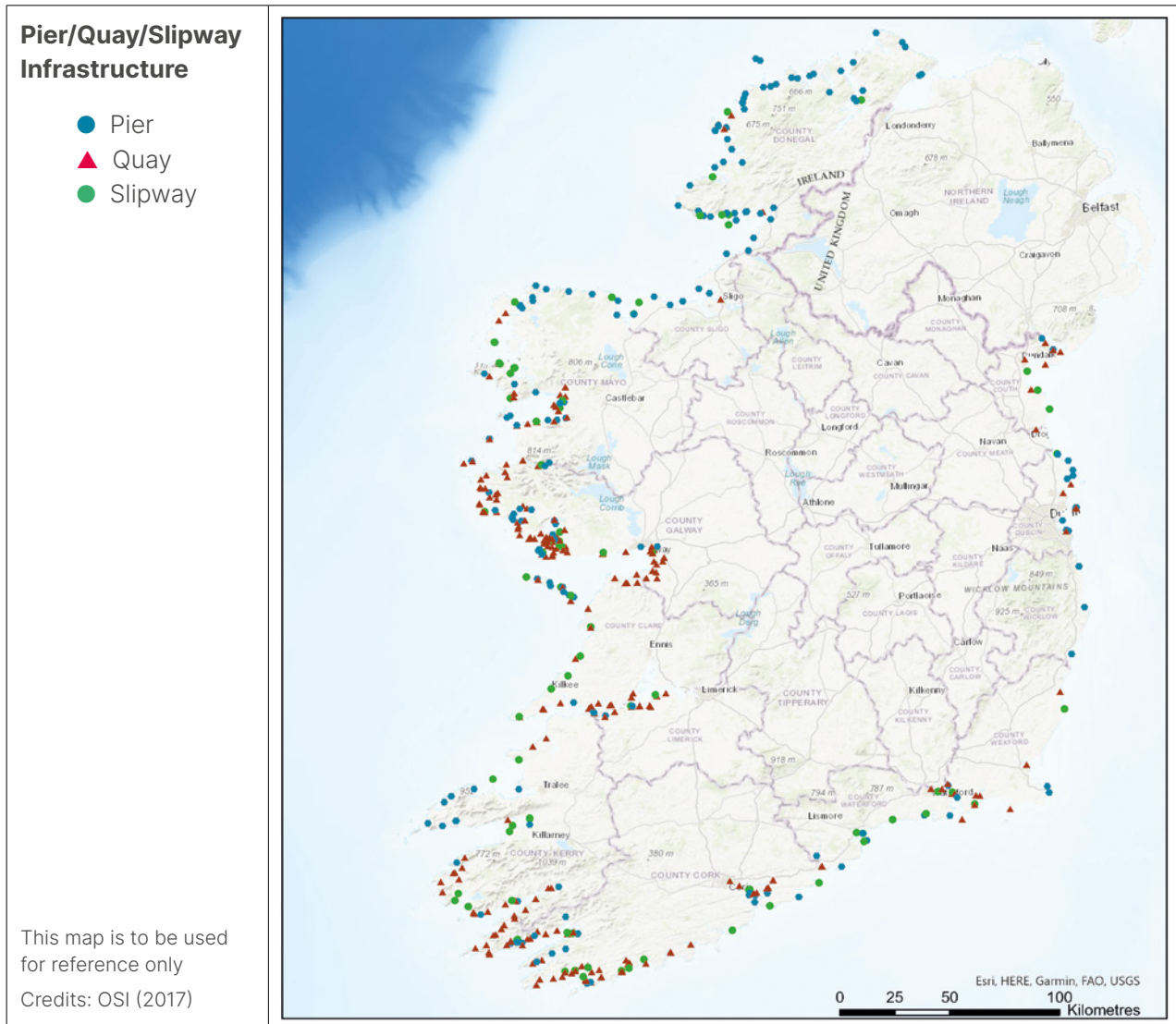
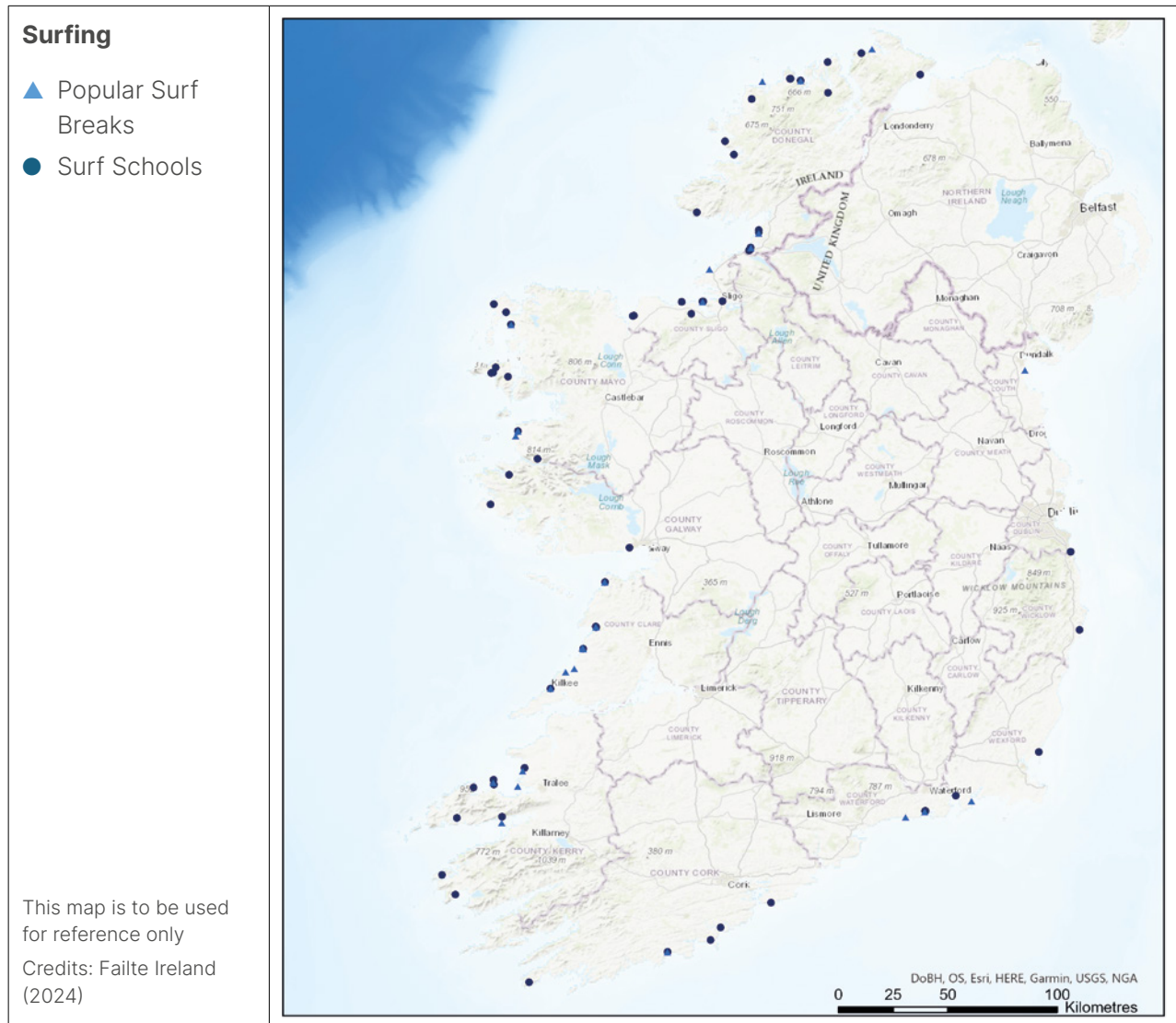


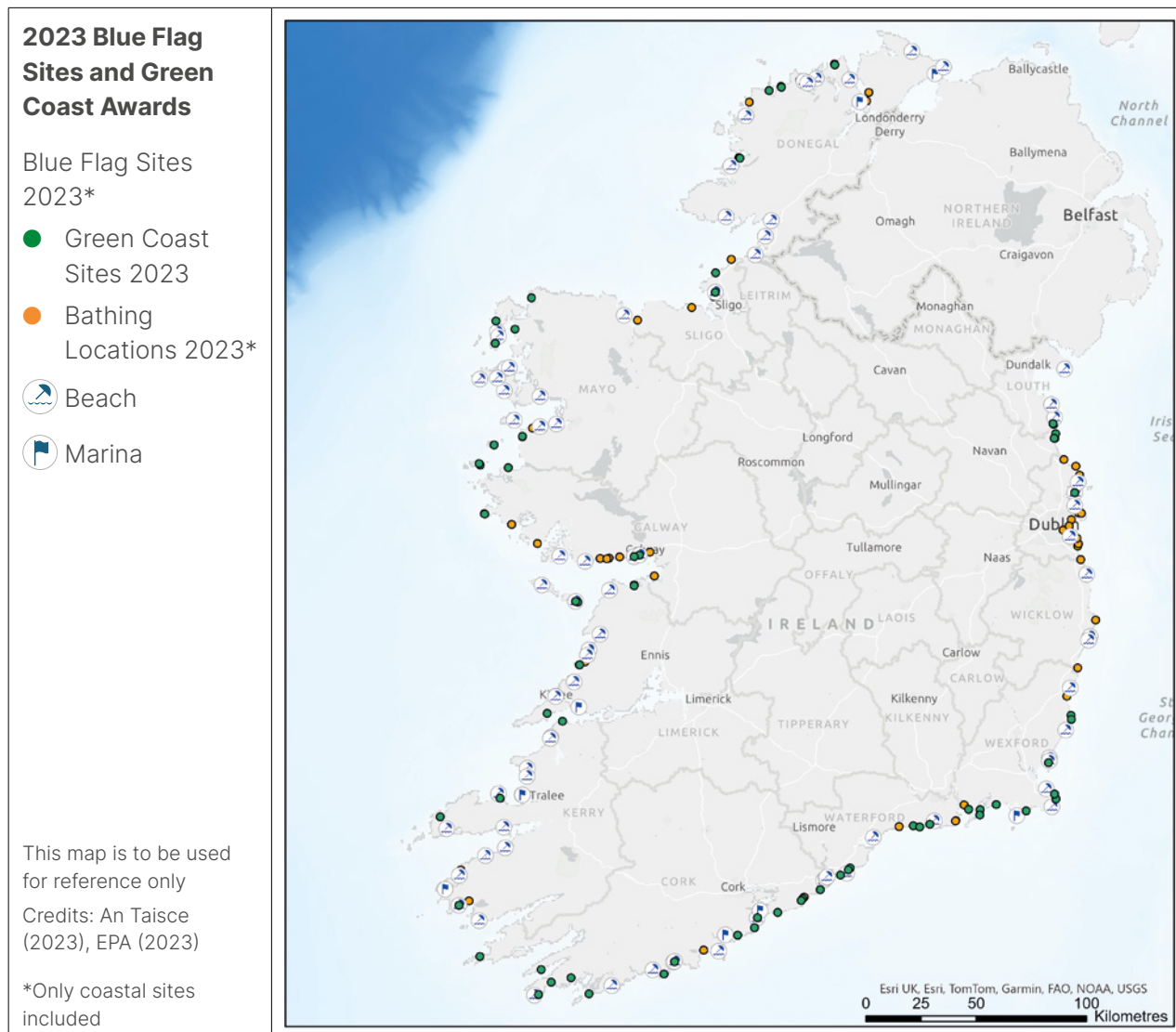
Figure 12 illustrates the locations of surf schools and popular surf breaks in the Republic of Ireland. The geographic advantages of the west coast in terms of access to Atlantic swells helps to explain the numerous points of exemplary surfing and matching surf schools in this region. On the other hand, as can be seen in Figure 13 the east coast is equally well provisioned with beaches and bathing areas.



**Figure 12:** Locations of Surf Breaks and Surf Schools



**Figure 13:** Locations of Beaches and Marinas

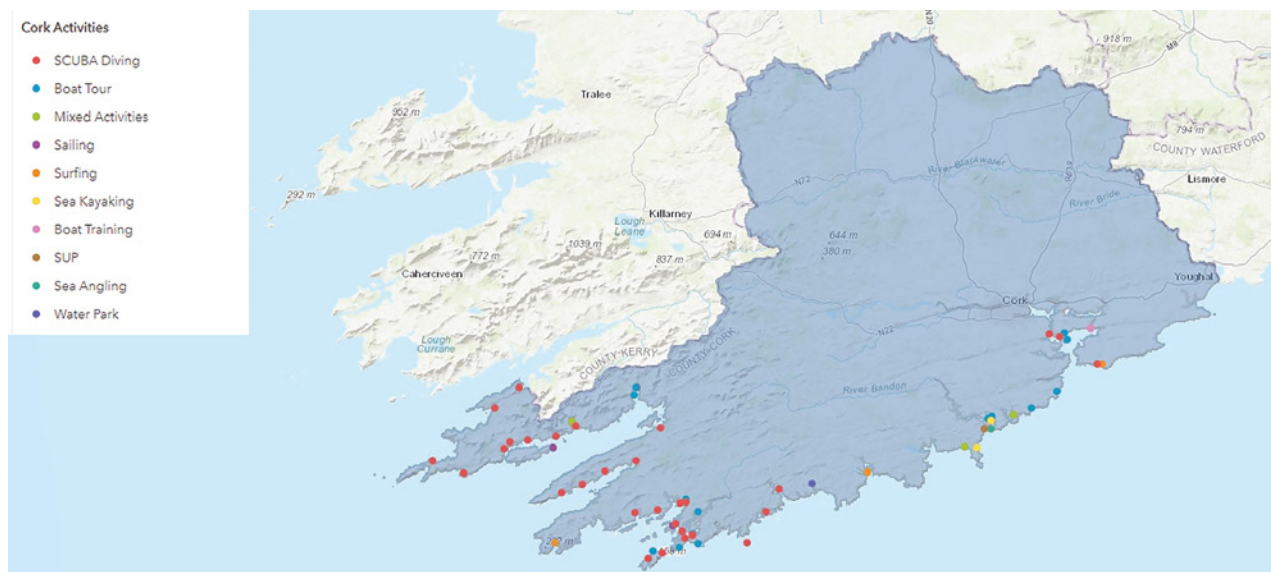


At a county level, it would appear, based on the business directory information available to the researchers, that Cork has the greatest number of marine and coastal recreational businesses with 37 businesses. Next is Kerry (30) and then Donegal (29). Somewhat surprisingly, given the comparative shortness of the coastline, Sligo has the fourth largest number of marine and coastal recreational businesses with 22. There are however a number of popular beaches and surf breaks along its shoreline.

Below, in Figure 14 and Figure 15, are maps depicting the types of activities offered by businesses in two counties. The first is Cork, chosen as it has the most marine and coastal recreational businesses of any county in Ireland. The second map is of Donegal, as it is the county where there is most information available. Two sources of data were used to create Figure 14 and Figure 15. Firstly, respondents of the face-to-face survey were asked to highlight on a map the areas they use for marine recreational activities. Secondly, websites of all marine and coastal businesses in Cork and Donegal were combed to see if additional information could be gathered. As such, these figures include information from respondents and non-respondents. Even then, these maps may not depict all marine business activity in Cork and Donegal. Additionally, these maps only aim to highlight areas where businesses take their customers, many other areas across both counties are used for recreation both by individuals and clubs.



**Figure 14:** Locations Where Recreational Activities are Provided in Cork

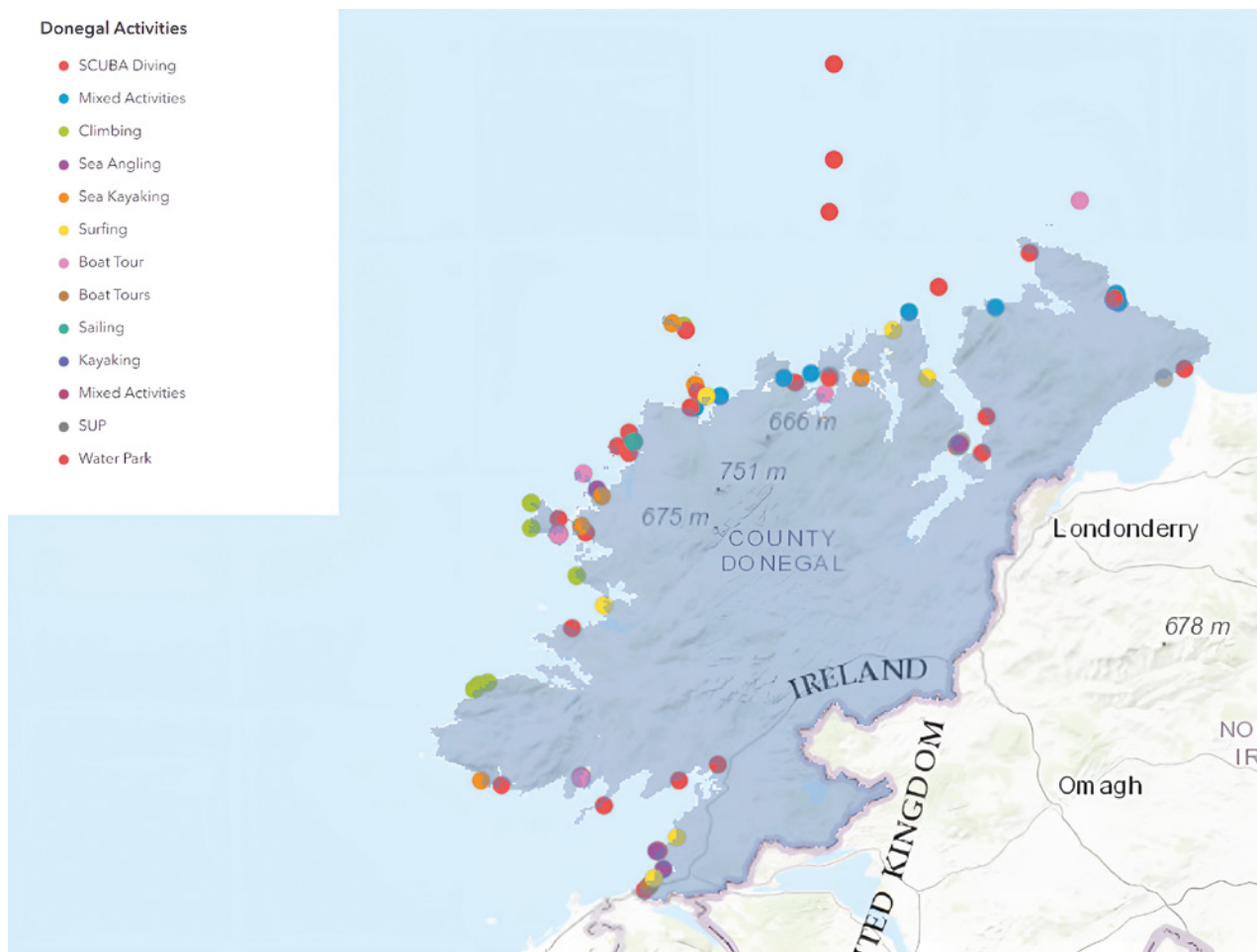


**Source:** ESRI, World Topographic Map

Figure 14 demonstrates the wide variety of activities that are on offer in Cork, which make use of a variety of man-made and natural resources. A good example of this are the boat tours. Boat tour operators in Cork offer both wildlife watching and tours relating to historic sites such as Spike Island. Tours operators that focus on wildlife offer the opportunity to travel along Cork’s coastline or nearby islands where puffins, seals and terns can be seen or out to sea where whales, porpoises and basking sharks can be found. Boat operators frequently mention that they have a P5 license, which allows boat operators to travel 30 miles out to sea. The exact location they travel to on a trip often depended on what their customers wished to see, the knowledge of the skipper, discussion with other boat operators about their recent viewings and weather conditions. Sea anglers used similar methods to choose the best locations for their customers on their trips. In addition to boat tours, sailing is also on offer in Cork. Those offering sailing, which may be a combination of wildlife watching and training, made use of some of the islands dotted around Cork. These islands and the waters around Cork also play host to Scuba divers who are able to take advantage of coastal reefs, dive sites around Fastnet Lighthouse and the ecosystem habitats of sunken ships, boats and even a submarine.

Beaches and coastal waters are also extensively used for a variety of activities. Surfing, sea kayaking and Stand-Up Paddle boarding (SUP) are all on offer. However, the number of businesses providing these activities is fewer than in areas like county Clare, which has a particularly high number of surfing schools. Like most other counties there are also areas that offer what are termed here “mixed activities”. These are simply areas that offer more than one activity, most frequently, in the case of Cork, a combination of surfing, seas kayaking and SUP.

**Figure 15:** Locations Where Recreational Activities are Provided in Donegal



**Source:** ESRI, World Topographic Map

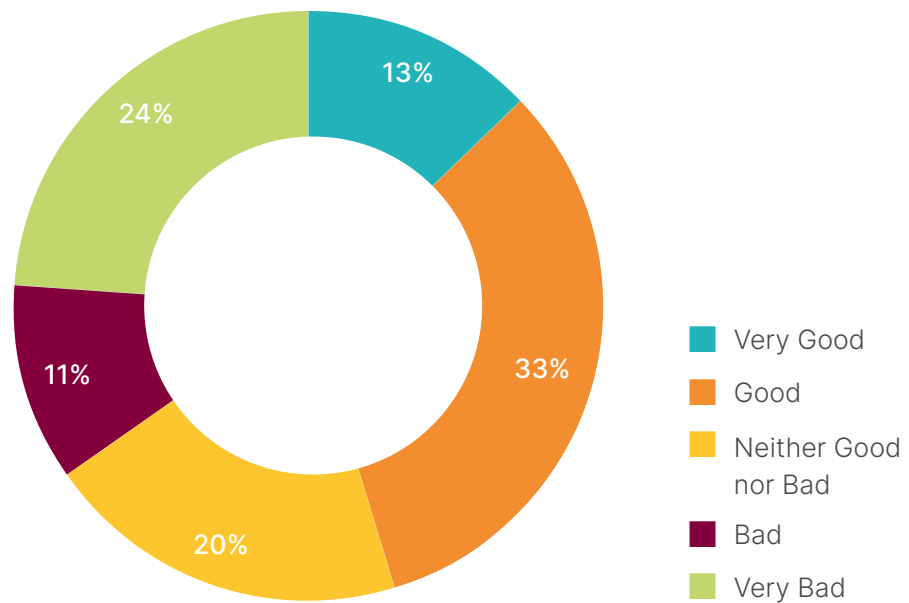
Like Cork, Donegal offers an abundance of activities to potential customers. In comparison to Cork, there seems to be a greater focus on physical activities as opposed to boat tours. Amongst the offerings for physical activities in Donegal are rather unique climbs of sea stacks, Scuba diving sites and sea kayaking tours to islands. Surfing and sea angling are also popular. “mixed activities” are also on offer in Donegal with a wide range of activities available which include pier jumps, crabbing, and rock pooling as well as surfing, sea kayaking and SUP.

In the case of both Cork and Donegal, the relative abundance of sites marked for diving, and in the case of Donegal climbing, should not suggest that these are the most dominant activities in these regions. Rather, these are types of activities for which customers like to be able to go to a variety of sites. Fortunately, the Irish coastline is able to offer such variety.

Once the mapping exercise had been completed with the respondents, they were asked how they would rate the man-made infrastructure at the sites they use most often (Figure 16). If further clarification was needed, the respondent was given examples of man-made infrastructures, which included piers, moorings, and infrastructure that enables access to the sites they use. Responses varied with the two most frequently chosen responses being “good” (33%) and “very bad” (24%). Some respondents noted that recent improvements were made to the infrastructures that they used and that these changes had made a big difference to their business. On the other hand, those who chose “very bad” often cited a lack of investment in the infrastructure they were forced to use. Interestingly, some respondents indicated that the infrastructure at the sites they use is almost non-existent. However, they realise that if they want to offer a ‘quiet’ or ‘remote’ tourism experience to their customers they have to forego high quality infrastructure.

**Figure 16:** Rating of Man-Made Infrastructure in Coastal Locations Used by Respondents

n=55



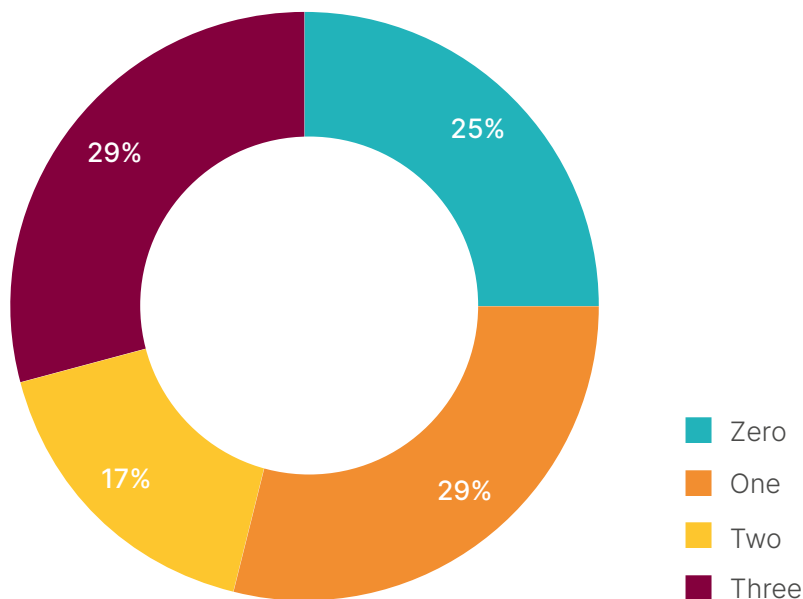
The respondents were subsequently asked to suggest specific infrastructural changes they would make. A recurring issue brought up by the respondents was access. Respondents often discussed ladders and piers that were difficult to use for the able bodied and impossible to use for people with even mild physical disabilities. This seemed to be particularly true of those offering boat tours and sea angling. This, as can be imagined, means that those who have limited choice of recreational activities due to their disability can become excluded from certain marine recreation pursuits due to the poor accessibility infrastructure provided in some locations.

Other common suggestions were the provisioning of facilities like car parking spaces, changing facilities, toilets, bins and showers with some respondents stating that outdoor rinse-off showers would be adequate. The most common suggestion was for improvement or construction of a pontoon or pier. Approximately a quarter of all respondents answered this open-ended question by discussing the need for a new or improved pontoon or pier. Some even suggested that further investment by their businesses had been inhibited by the current state of the pontoons, piers and accessibility in the locations they use.

Respondents were then asked about their awareness of habitats in the location used most often by their business (Figure 17). Each respondent was given the following definition for a habitat “a natural home or environment of an animal, plant, or other organism”. Almost all respondents (95%) said they were aware of the habitats in the location their business uses. As a follow-up, respondents were asked to list three habitats they were aware of in the locations they use. Only 29% listed three examples of habitats. Often respondents did not list examples of habitats, rather they gave examples of animal species living in the area. Respondents would regularly give one or two examples of habitats and then list animal species. This is not, in itself, problematic and is in many respects understandable. The animal species are much more visible and often form some part of the experience offered by these businesses. Marine habitats, on the other hand, can be hidden from sight. It is also arguably true that by answering with an animal species it implies that the named animal species has a habitat somewhere in the vicinity without having to name the specific habitat. In any case, in the context of the framing of policy and strategy concerning habitats, it may be important to demonstrate the knock-on effects of habitat destruction on animal species so that the implications of habitat destruction are fully understood.

**Figure 17:** Habitats Correctly Identified by Respondents

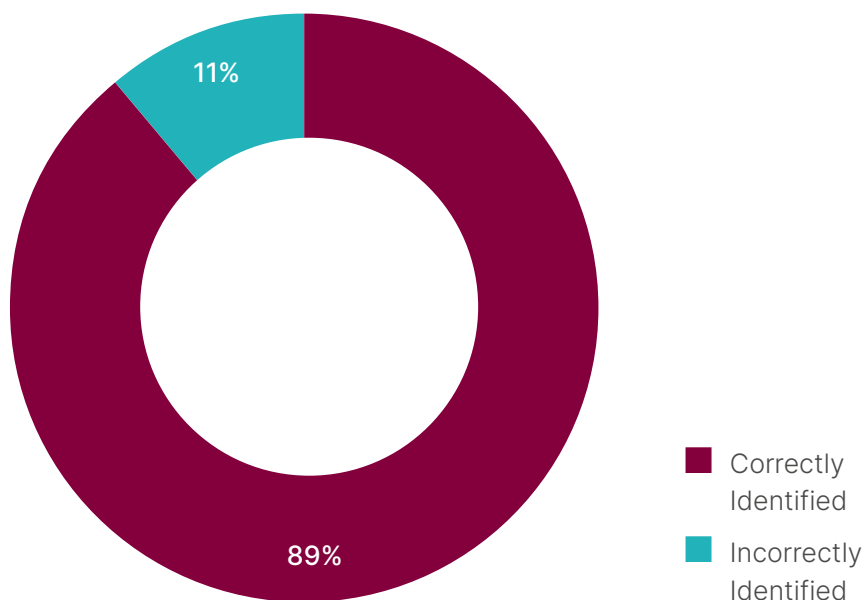
n=59



In contrast, Figure 18 demonstrates that a large portion (89%) of the respondents were able to correctly identify whether the area they worked in is a designated protected area of any kind. This suggests that the respondents have a good understanding of the boundaries of protected areas in the locations they use.

**Figure 18:** Designated Protected Areas Correctly Identified by Respondents

n=53



### Connection to local communities

To understand how the respondents' customers interact with the area their marine leisure business is situated in, respondents were asked to rate how often their customers used other local services. It should be acknowledged that the businesses in these communities, including the marine recreation businesses, support each other. As such, marine and coastal recreational businesses provide an important tourism offering that when coupled with other local businesses help many rural locations across Ireland by providing valuable economic opportunities.



**Table 1:** Customer Usage of Other Local Businesses

n=59

Providers of	Always	Frequently	Occasionally	Rarely	Never	N/A
Accommodation	30%	42%	15%	8%	2%	3%
Food or Drink	35%	53%	8%	0%	2%	2%
Local Shop	30%	45%	12%	3%	3%	7%
Visitor Centres	10%	10%	27%	15%	12%	27%
Specialist Shops	3%	20%	30%	7%	17%	23%
Harbour	20%	15%	12%	12%	23%	18%

Over 72% of respondents selected “always” or “frequently” in relation to how often their customers used local accommodation (Table 1). Those who did not select “always” or “frequently” cited the fact that day-trippers are a large component of their customer base. Some even suggested that day-trippers have become a larger part of their customer base in recent years. Similarly, 88% of respondents selected “always” or “frequently” in reference to the use of local businesses that offer food or drink. These respondents often mentioned local coffee shops being the beneficiaries of their marine and coastal recreational customers. Again, local shops were cited as being used either “always” or “frequently” by 75% of the respondents.

Visitor centres were used much less often by marine and coastal recreational customers. Approximately 20% of the respondents estimated that their customers used these types of facilities “always” or “frequently”. However, a contributing factor to this relatively low score is that there was not a visitor centre or museum near many of the respondents’ businesses. Specialist shops were used “occasionally”, “frequently” or “always” by over half the sample. In some cases, the specialist shop is part of the business of the respondent. For example, surf related businesses often sold specialist equipment. This gives some indication why these shops are used quite often overall. On the other hand, nearly a quarter of the sample selected the “not applicable” option. This is, to some extent, to be expected as there is probably a low correlation between the customers of boat tour operators and the need for specialist shops. As such, there may be less likelihood of these shops being in the respondent’s local area.

The usage of harbours and moorings was highly dependent on the type of business the respondent ran. Some businesses used these facilities as part of their activities and, by extension, so did their customers. As such, there is a reasonable dispersion of responses across the options for this question with 35% using them “always” or “frequently” and a further 35% using them “rarely” or “never”. Some respondents selected the “other” option, their suggestions included various forms of transport, taxis, buses, ferries as well as tour providers. Others suggested car parks and leisure or spa centres.

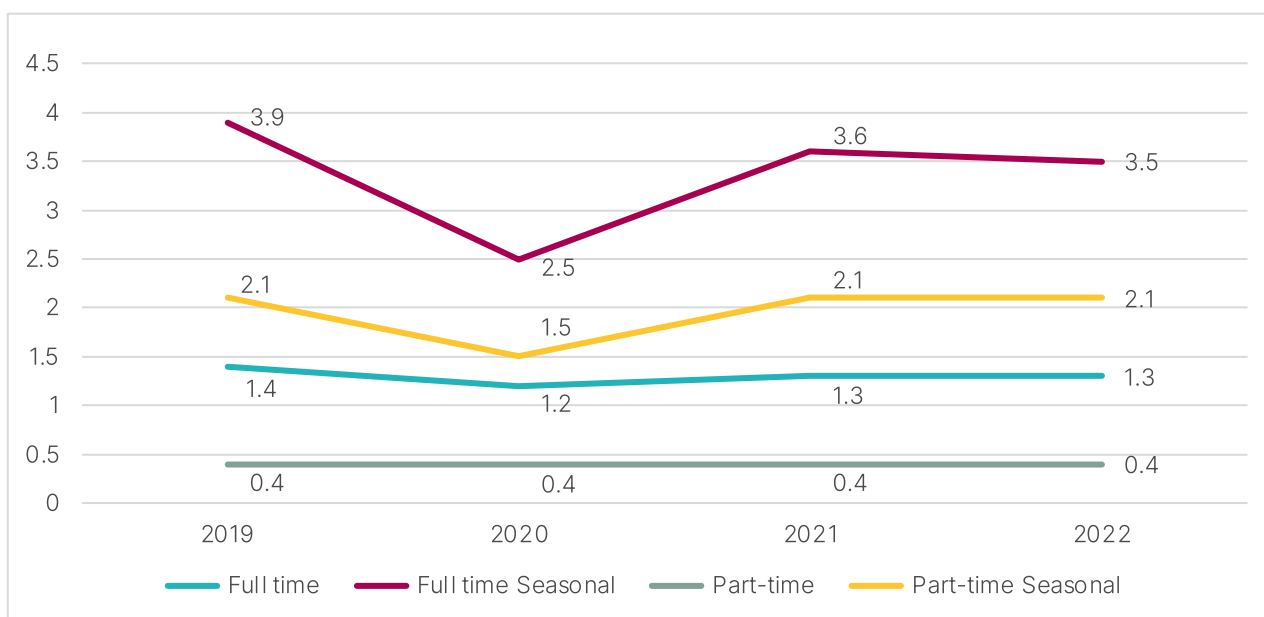
In addition to customers from marine recreational businesses using other local businesses, many of the respondents maintained some personal form of linkage to organisations or local businesses. Two-thirds stated that they were a member of IAAT. However, it should be reiterated that IAAT provided assistance in the dissemination of the survey by contacting their members and requesting that they undertake the survey drop with us. As such, this figure of two-thirds is in no way generalisable to all marine and coastal recreational businesses in Ireland, although they do have a large number of marine and coastal recreational businesses among their members. Another frequently mentioned response was informal linkages to other businesses. This included referrals to and from other businesses, including businesses that could be thought of as competing businesses.

## Staffing, finances and COVID-19

Following the questions related to businesses' interaction with the local community, respondents were asked questions related to staffing and the finances of their business from 2019 to 2022. In addition to describing the current state of the industry, this section of the survey also examined the impacts of the changes that occurred during and after the COVID-19 pandemic. In line with this goal, respondents were also asked a series of questions that specifically addressed COVID-19 and their perception of the government's handling of the pandemic.

**Figure 19:** Average Number of Staff

n=56



To begin, respondents were asked how many staff they had in four categories; full-time (30 hours or more per week), full-time seasonal, part-time and part-time seasonal in the years from 2019 to 2022. Seasonal here refers to any employment that does not encompass a full year. Respondents were also asked to include themselves and any paid family members when calculating staffing numbers. The average number of staff per business per year are shown in Figure 19.

In terms of total staff across the marine and coastal recreational tourism sector as a whole, staffing had not returned to 2019 levels by the end of 2022. In 2019 the average business employed 7.8 individuals. This dropped to 5.6 in 2020, the first year in which there was a COVID-19 related lockdown. This rose to 7.4 in 2021 and stayed almost stationary in 2022 at 7.3. This suggests that total staffing has not fully returned to 2019 levels with the biggest loss being in full-time seasonal work.

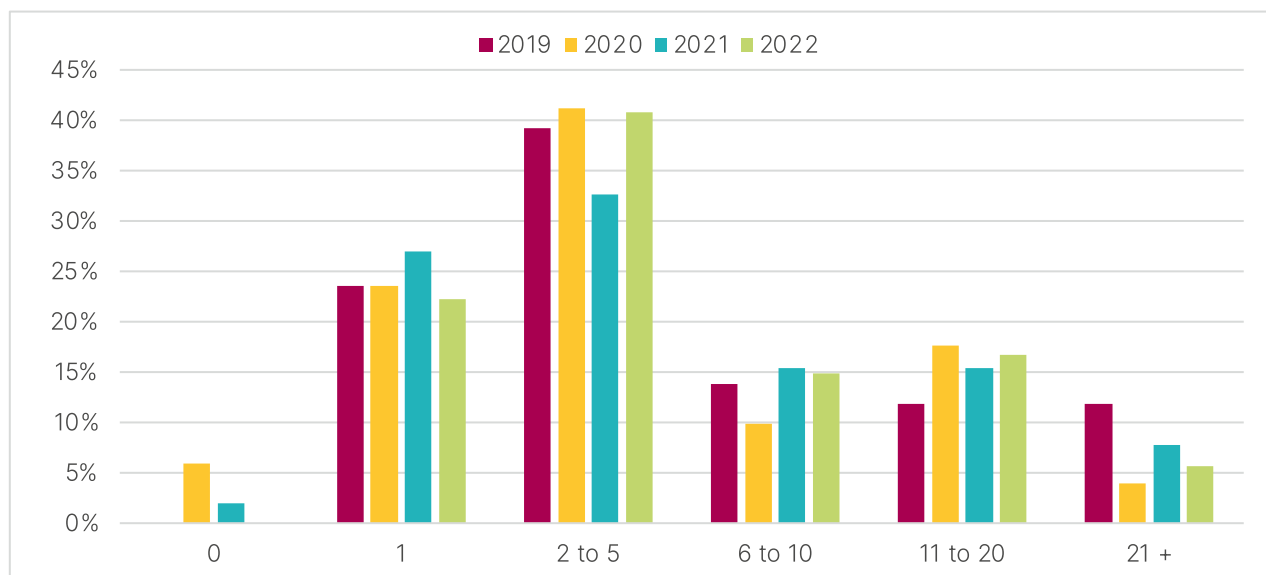
For comparison, if businesses that have high employment relative to the rest of the sample, in this case those hiring 30 or more employees in 2019, are removed the average number of total employees in 2019 was 6.4, in 2020 it was 4.8, in 2021 it was 6.3 and in 2022 it was 5.9. Overall, this suggests a similar loss in employees between the larger and smaller businesses. However, the drop between 2021 and 2022 is more noticeable after the outliers have been removed. Although this difference is still small being 0.4 employees rather than 0.1.

Figure 20 depicts the number of employees per business in the years 2019 to 2022. Across each of the four years, the category that the highest percentage of businesses fell into was 2 to 5 employees. Apart from 2021, approximately 40% of the businesses hired 2 to 5 employees, including the respondent. In 2021, this fell to 33%. In 2020 and 2021 some businesses effectively closed, hiring

zero people. Comparing 2019 and 2022, the percentages are reasonably similar. The biggest change is in the top two categories. In 2019, 12% of the sample hired between 11 to 20 persons. Whereas, in 2022, 17% of the sample hired the same number of people. However, in 2019, 12% hired 21 or more people whereas only 6% hired the same number of people in 2022.

**Figure 20:** Number of Employees 2019 - 2022

n=56



A follow-up question was asked to gauge the ratio of male to female employees in 2023. On average, for every one male member of staff, there were 0.68 female members of staff. One business also hired one employee who did not identify as male or female. Some respondents discussed the benefits their business receives in relation to female staff. They indicated that, from their experience, female customers tended to respond better to female instructors. Some suggested that they would like to employ more female staff, but women tended to be less likely to enter the industry. However, in general, respondents were more likely to indicate that they were happy to employ anyone with the skills necessary for the position. Inopportunately, the next question posed to the respondents suggested that finding potential employees with these skills can be difficult.

As can be seen in Table 2, respondents were asked about how difficult it was to employ staff with particular and required skill sets. As may be observed, several respondents chose the “Don’t know/ Not applicable” choice. In general, this tended to mean that the respondent had not looked for staff with those particular skills. This can be because the respondent did not wish to employ any additional members of staff, they undertook certain tasks themselves and had not looked to outsource those activities or that training was done within the business which meant that those skills were not a prerequisite for employment.

**Table 2: Ease of Recruiting Employees by Category**

n=57

	Easy	Fairly Easy	Neither Easy nor Difficult	Quite Difficult	Very Difficult	Don't know/ N/A
<b>Technical Skills</b>	11%	9%	12%	28%	30%	11%
<b>Mechanical Skills</b>	5%	11%	7%	21%	18%	39%
<b>Customer Services Skills</b>	11%	23%	14%	23%	12%	18%
<b>Financial Skills</b>	4%	16%	18%	9%	12%	42%
<b>Marketing and PR</b>	5%	23%	14%	11%	11%	37%

Overall, the responses suggest that there are issues getting staff with the expertise needed for marine and coastal recreational businesses. Nearly 60% of all respondents selected “quite difficult” or “very difficult” when asked how hard it is to get staff with the necessary technical and instructional skills needed to support their business. This is of particular importance given, as discussed earlier, that 63% of respondents consider instruction or training to be one of the services they provide. The other categories seemed to pose fewer issues for those hiring. However, it is worth reiterating that many of the respondents did not actively seek staff with the other skill sets. As such, it is difficult to determine how easy or difficult it is to get staff if the respondents were not actively looking for them.

Further discussions with respondents in relation to current staffing brought up some interesting points, some of which are a direct result of the COVID-19 pandemic. In some cases, staff or potential employees with sufficient training left the sector during the pandemic due to job insecurity. Some left to go abroad to countries with fewer restrictions around the recreational tourism sector while others changed to other types of careers. Additionally, some respondents mentioned that courses that would allow people to get technical training for marine and coastal recreational activities stopped or were reduced during 2020. Consequently, there are now fewer people with the desired skills needed for some businesses. Many tour operators also suggested it was almost impossible to hire a skipper. However, this seems to be unrelated to the COVID-19 pandemic. Respondents suggested that skippers tend to want to own and run their own boat and, as such, it is difficult to hire a skipper as an employee.

Another frequent talking point in relation to staffing was housing. Several respondents discussed the impact of the availability and cost of housing on their ability to get staff. According to the respondents, staff or potential staff can no longer live near many of the businesses surveyed because it is too expensive. This has greatly affected their ability to hire staff, and, some have suggested, it will affect the tourism offering going forward if the accommodation crisis continues.

Five questions were asked in relation to the finances of the respondent’s business. Each of the questions relates to the period 2019 to 2022. In a data set with businesses that have relatively high turnover, as is present in the current sample, the mean (average) value is often higher than is representative of a “normal” business within a given market. In these cases, the median value is often presented. The median is the middle value in the range of values from smallest to largest. The median is therefore usually a better depiction of a “normal” business. However, the median value is



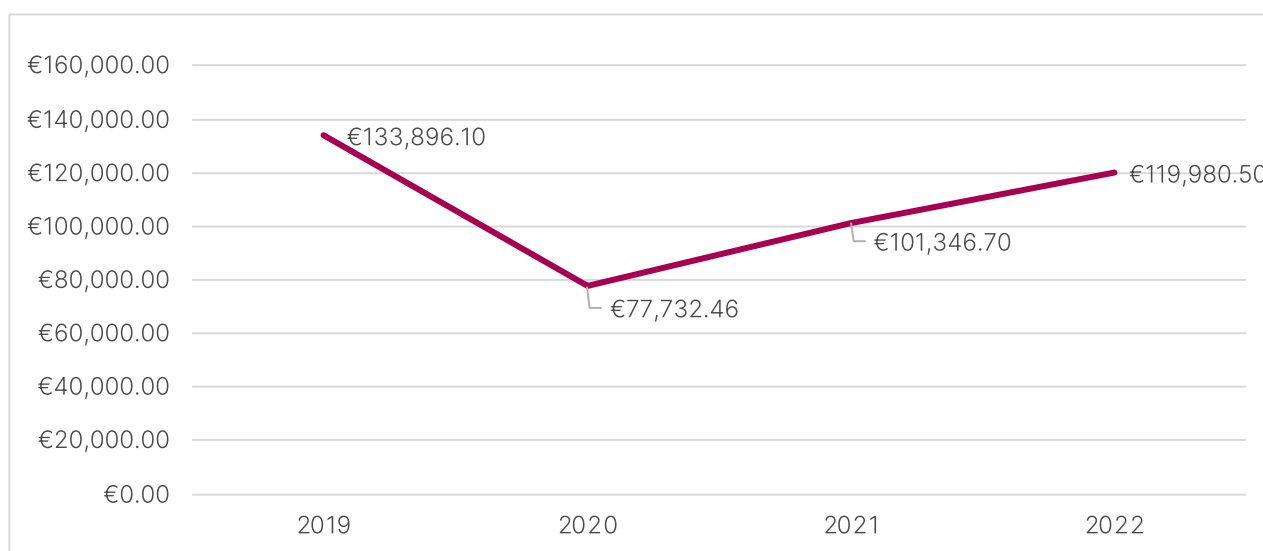
not presented here for reasons specific to this data set and the impact of the COVID-19 pandemic on turnover. Firstly, several businesses did not operate during COVID-19. These businesses would not affect the median value but would have an effect on the mean value and this effect should be captured in this report. Secondly, it seems, from the data collected, that the businesses most severely impacted by the COVID-19 pandemic, in terms of percentage loss of turnover, were the larger businesses. This is likely due to these businesses operating outside of the summer months when a “full lockdown” was in place as well as these businesses offering school tours, having bigger groups during a given trip, and offering services like cafes and accommodation, all of which were impacted by the COVID-19 restrictions. The effects on larger businesses are also not seen when using the median value. As such, the mean value is presented as it provides a better indication of the impact of COVID-19. For comparison, the mean value without the inclusion of larger businesses is also presented.

It is also worth noting that the response rate for these financial questions was lower than for other questions asked of the respondents. In general, financial questions asked to survey respondents tend to have a lower response rate than other types of questions. In this case, most respondents chose to answer the question when asked face to face whereas only one respondent chose to answer the financial questions asked via the online survey. Additionally, some respondents had difficulty remembering figures related to questions about operating cost and capital investment which impacted the response rate further.

The responses from two businesses have also been excluded. The representatives of these businesses gave complete answers for the years they were employed by these establishments. However, they had not worked for them for the entire period from 2019 to 2022. Consequently, the inclusion of these businesses, which both happen to be relatively large, for only a couple of the years between 2019 and 2022, causes a large spike in turnover and in the other financial measurement that is in no way indicative of the market. As such, the responses of these two businesses for these financial questions have not been included.

**Figure 21:** Average Turnover by Year

n=43



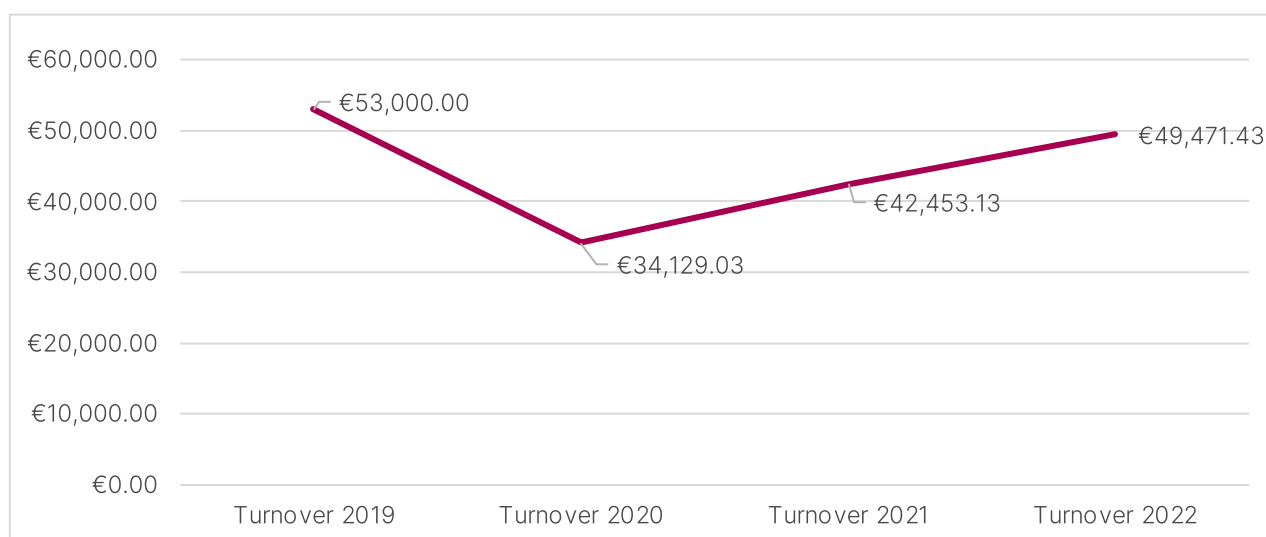
The first question related to turnover in each of the years between 2019 and 2022 (Figure 21). In 2019, mean turnover was €133,896, this fell to €77,732 in 2020. Although some respondents suggested that 2020 was their busiest year ever, other businesses could not operate or were severely limited in the number of people they could offer their services to or, indeed, limited in the services they could offer. Consequently, the restrictions related to COVID-19 affected businesses in this sector unequally. Average turnover in 2021 was €101,347 and €119,981 in 2022, trending towards

2019 figures. It is also worth pointing out that this figure has not been adjusted for the unusually high inflation between 2019 and 2022. After adjusting for inflation, turnover for 2022 is equivalent to €106,097 in 2019 euros, an approximate 21% loss in real terms. These figures are broadly in line with figures from Ireland's ocean economy report for 2023 in relation to marine and coastal tourism over the same period (Reilly et al. 2023). However, the downturn was not as severe in the recreational sectors as it was in other sectors of marine and coastal tourism because these businesses offer outdoor activities that allow for space between participants and their peak season was during less restrictive periods of the lock-down.

Six businesses earned more than €300,000 in one of the years between 2019 and 2022. For the purposes of comparison these businesses have been removed in Figure 22. Therefore, Figure 22 shows the average turnover of all businesses after the exclusion of these relatively large operators. This graph suggests a similar but less acute effect on the change in turnover between 2019 and 2022 to the previous figure which includes the larger businesses. After adjusting for inflation, the real value of the average turnover figure in 2022 is €43,746, a 17% loss in comparison to 2019.

**Figure 22:** Average Turnover by Year Excluding Relatively Large Operators

n=37

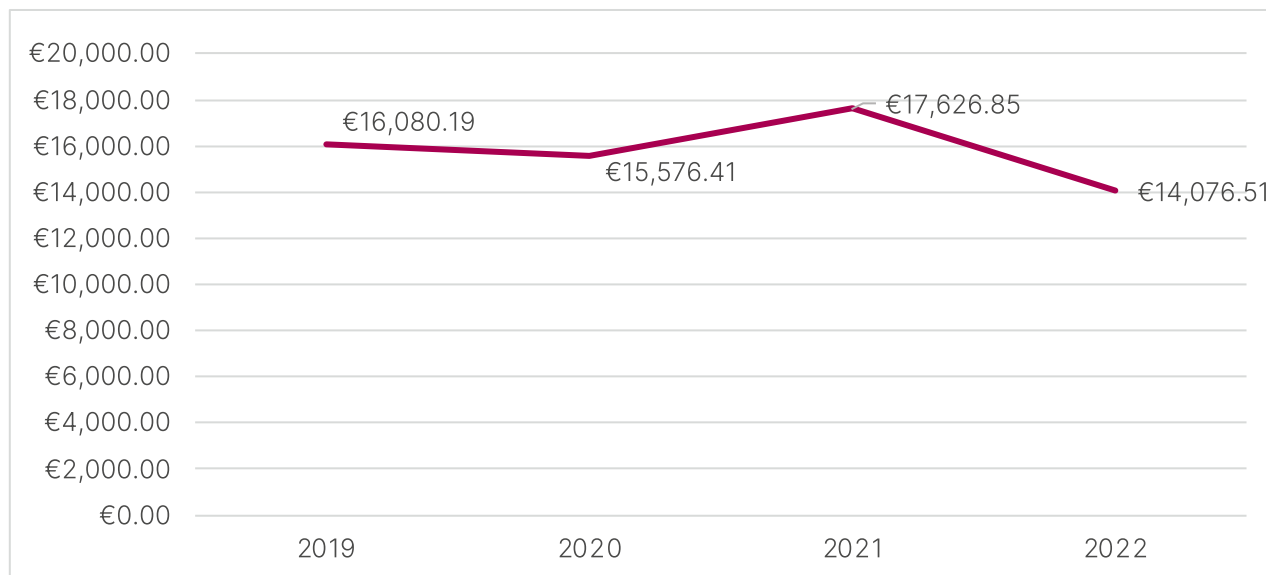


Following the question on turnover, respondents were asked about their business's capital investment in the years from 2019 to 2022 (Figure 23). Capital investment relates to monies spent on land, buildings and equipment. It does not include depreciation during those years. Somewhat surprisingly, average capital investment was similar in 2019 and 2020 at €16,080 and €15,576, respectively. Given the level of uncertainty about the sector in 2020, the expectation was that very little investment would be made until the market was more stable. A possible driver of this investment may be expenditure on equipment necessary to operate during the pandemic, for example, washing facilities for equipment, hand wash dispensers and so on. There may also have been a spike in costs (above inflation in the general economy) during 2020 when people not affiliated with marine and coastal recreational businesses bought outdoor equipment causing an increase in demand and therefore an increase in the cost of equipment.

The year with the average highest capital expenditure was 2021 at €17,627. This was in line with expectations. It may be the case that some businesses put off much of their traditional capital expenditure in 2020 leading to a greater need for investment in 2021. This would also mean that less investment would be needed in 2022, as much of the equipment would be relatively new. It is also worth pointing out that some of the respondents do not operate from a building, as such their only capital costs are equipment.

**Figure 23:** Average Capital Investment by Year

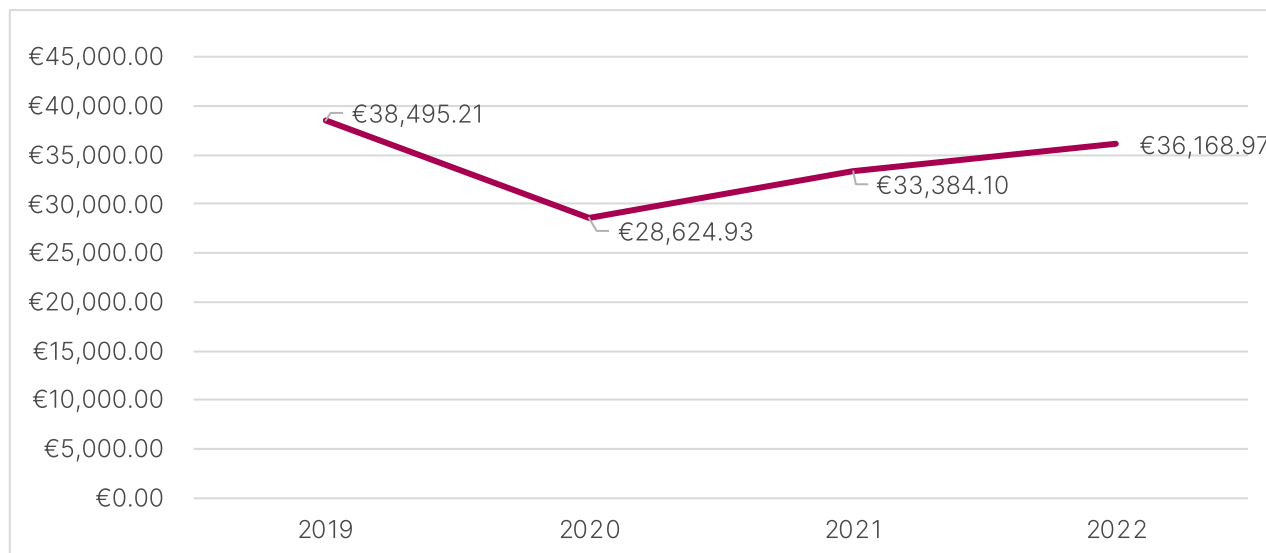
n=39



Operating costs, which include fuel cost, insurance, rent etc. were lowest in 2020 when the average cost was €28,625; approximately €10,000 less than in 2019 (Figure 24). This is simply because operating costs are, for most recreation businesses, linked to the number of trips taken. When the number of trips falls, so too do operating costs. Although operating costs rose in 2021 and 2022 they have not reached the levels seen in 2019. Again, a partial explanation for this is a fall in the number of trips, as indicated by a lower turnover in 2022 in comparison to 2019. Additionally, some of these businesses are more insulated from the rising operating costs as they do not operate from a physical location meaning rents, electricity costs, etc. may not be applicable.

**Figure 24:** Average Operating Costs by Year

n=32

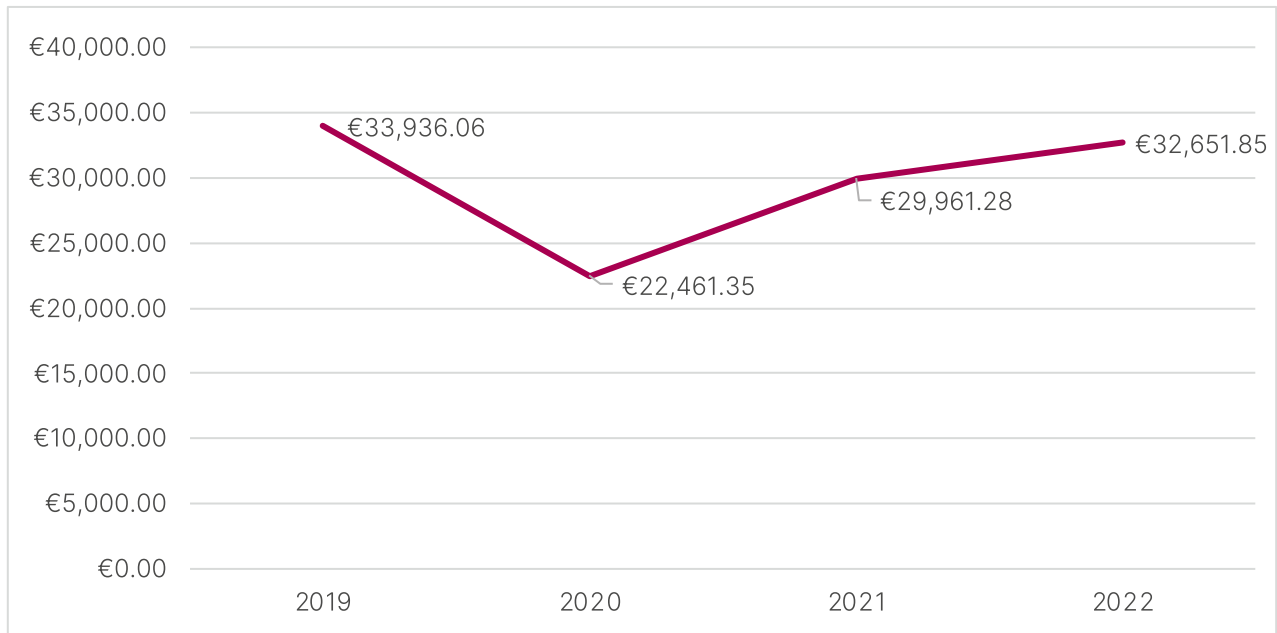


When asked about labour costs, respondents were told to include their own wages (Figure 25). Some respondents stated that they did not pay themselves a wage between 2019 to 2022, all monies earned by the business were returned to the business. This could happen for a variety of reasons, most often to allow the business time to survive and grow. They may, therefore, expect an income from the business in the future. Approximately, 25% of the respondents who answered this question reported zero labour costs. It is important to highlight that many of the respondents had a second job or were “retired”, so they had an additional source of income. However, it may also be the case that some respondents did not want to disclose their own income. Labour costs followed a similar trend to operating costs and presumably operate on the same logic. Labour costs are a function of the number

of trips taken so costs were lowest in 2020 and highest in 2019, presumably when the number of trips was highest.

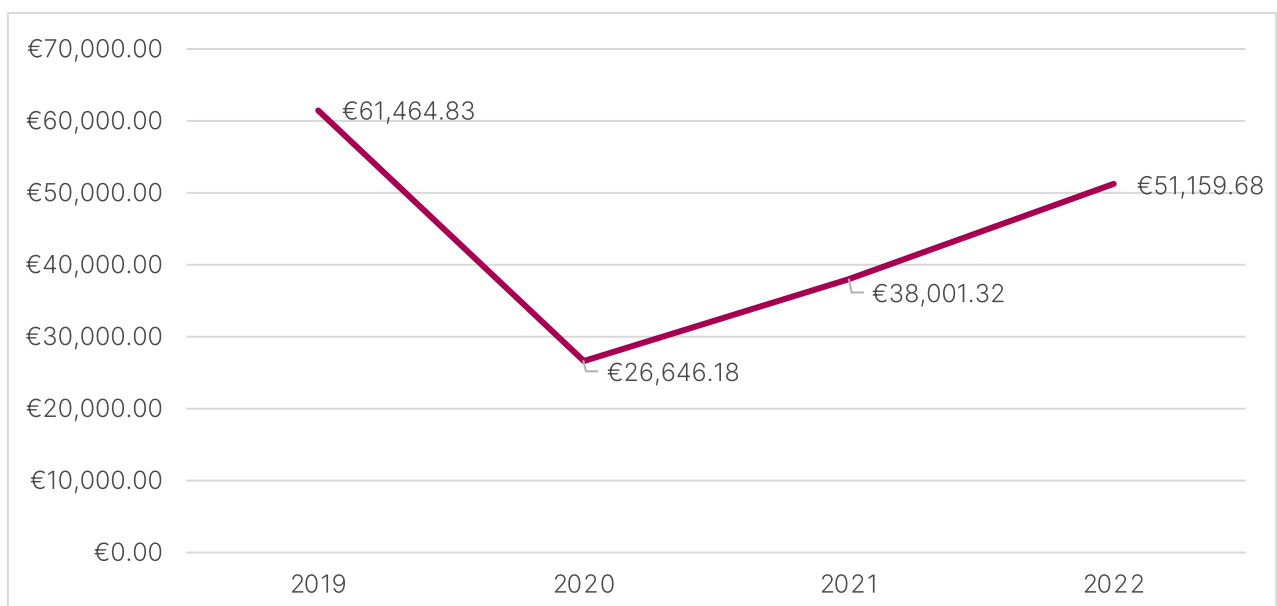
**Figure 25:** Average Labour Costs by Year

n=35



In addition to the questions asked of the respondents, an estimate of operating profit has been calculated (Figure 26). This value was calculated as turnover minus labour and operating costs. Operating profit was highest in 2019 at €61,465 approximately €10,000 higher than in 2022 when operating profits were €51,160. As the previous figures indicate, this is a result of turnover not returning to pre-COVID-19 levels as rapidly as expenses. After adjusting for inflation, the difference between the operating profit in 2022 compared to 2019 becomes more extreme. The real operating profit is approximately €45,240, which is 36% lower than in 2019 in real terms. This indicates that these businesses were substantially worse off in 2022 than they were in 2019. Overall, the estimate of operating profit suggests that the deepest effects of the COVID-19 pandemic were felt over a two-year period and continued into 2022.

**Figure 26:** Average Operating Profit by Year

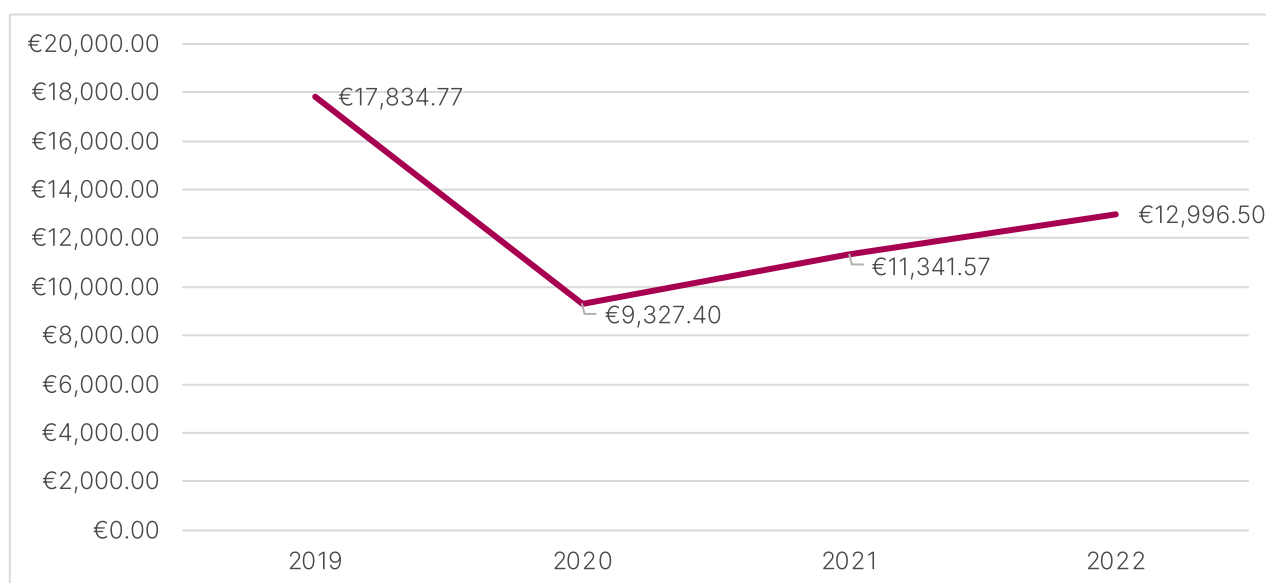


**Note:** no n value is given here as these values are calculated using the means of turnover, opportunity costs and labour costs.



For comparison, Figure 27 shows the operating profit after the removal of businesses that earned over €300,000 in any year between 2019 and 2022. For these businesses, operating profit is down in comparison to 2019 by 27%. After accounting for inflation, the operating profit is €11,492.59 suggesting a 36% loss. Once these relatively large operators are removed, labour costs between 2019 and 2022 increase by 5% and operating costs increase by 2%. Both are lower than would be expected given the level of inflation during that period, but, unlike the full sample where the change in labour costs and operating costs is negative between 2019 and 2022, the change for the restricted sample is positive for these same costs. However, as seen by comparison between Figures 21 and 22, the larger businesses are taking longer to return to 2019 levels of turnover in comparison to the sample without the relatively large operators. In totality, this suggests that the comparative loss between 2019 and 2022 is felt equally by the larger and smaller businesses.

**Figure 27:** Operating Profit by Year Excluding Relatively Large Operators

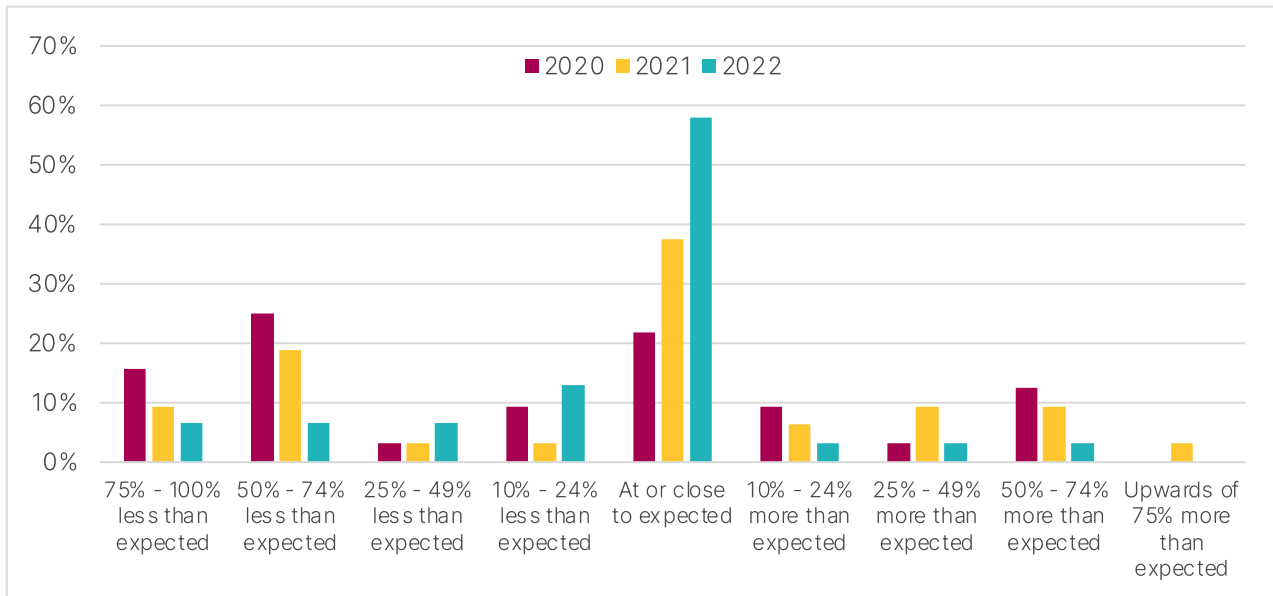


**Note:** no n value is given here as these values are calculated using the means of turnover, opportunity costs and labour costs.

The respondents were also asked what their turnover was in comparison to their expectations between the years 2020 and 2022 (Figure 28). This gives some indication of the number of businesses that felt they did better or worse than expected specifically during the COVID-19 pandemic. Of course, most businesses were worse off in 2020 than they had expected in 2019. However, a quarter were better off due to increased domestic demand. In 2021, there were nearly as many businesses that were worse off as there were businesses that were better off. However, in 2022, in terms of turnover nearly a third of all businesses were worse off than they had expected in 2019. This does not necessarily mean that these businesses' turnover had not returned to 2019 levels, rather for some businesses they no longer enjoyed the growth they had in previous years.

**Figure 28:** Comparisons of Real Turnover to Expected Turnover 2020 – 2022

n=33



Respondents were also asked direct questions concerning the impact of COVID-19 on their business. The first of these questions was simply, whether their business was in danger of permanently shutting down due to the pandemic. There was an almost equal “Yes” (49%) to “No” (51%) response split in relation to this question. In discussions with respondents who said their business was in danger of shutting down, they often mentioned that if COVID-19 related restrictions had continued it might have caused their business to close. As a reminder, only one business that closed because of the pandemic and one business that altered its business model completed the survey. Consequently, the results of this section as a whole only reflect those that survived the COVID-19 related restrictions, and, as such may present a more favourable representation of the impact of the COVID-19 pandemic than is truly accurate. This should be noted for the following COVID-19 related questions.

Nearly 60% of the respondents reported that they received some government assistance in relation to the COVID-19 pandemic. Thirty-seven percent received financial aid from a single initiative, the most popular of which was the “Fáilte Ireland’s Tourism Business Continuity Schemes” (Table 3). The remainder of the sample received between two and four forms of financial assistance from the government.

**Table 3:** Respondents in Receipt of Government Assistance Scheme

(n=54)

Government assistance schemes	Percentage of respondents in receipt
Fáilte Ireland’s Tourism Business Continuity Schemes	30%
Covid Restrictions Support Scheme	19%
Employment Wage Subsidy Scheme	28%
Outdoor Dining Enhancement Scheme	9%
Small Business Assistance Scheme for Covid	2%
Other	11%
None	41%

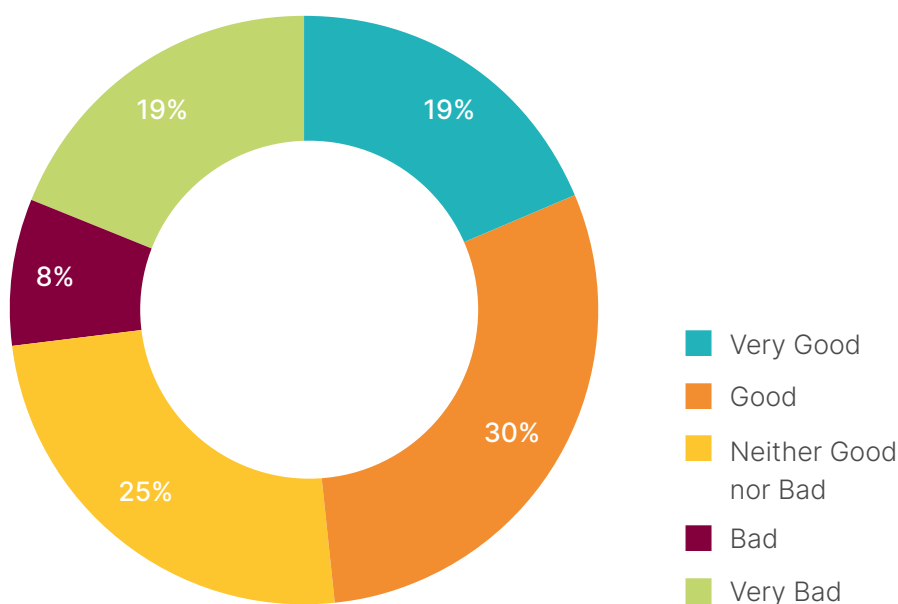
**Note:** totals exceed 100% because some businesses received assistance from more than one scheme.

In discussion with the respondents, they noted difficulty obtaining grants. This can be broadly broken into two categories. Firstly, some people found it difficult to deal with the bureaucracy of getting a grant. Some respondents discussed having difficulties filling out grant application forms and understanding the impacts of the grants after restrictions had been lifted. Eligibility for schemes was the second issue. The eligibility issue most often discussed was the turnover threshold of €50,000 that needed to be met before a business could receive the “Fáilte Ireland’s Tourism Business Continuity Schemes”. Several respondents did not meet this threshold limit. As such, they felt they were unable to receive any government assistance. Additionally, some respondents did receive Pandemic Unemployment Payment (PUP) but for many respondents, as previously mentioned, their business is a second job, which meant they were not able to receive any form of assistance.

As can be seen in Figure 29, respondents were also asked to rate the government’s handling of the pandemic in relation to their business. It was made explicit to respondents that the answer should only refer to their business and not their opinion on the handling of the pandemic more generally. The responses ran the full range of the scale. About 49% rated the government’s handling as “good” or “very good”, 25% as “neither good nor bad” and 26% as “bad” or “very bad”. In discussion with respondents many noted the very difficult situation the government was in, some spoke about the restrictions possibly going too far with no real benefit, e.g. excessive cleaning of equipment or proximity requirements for outdoor activities like boat tours. Others suggested that countries like the United Kingdom had more favourable (less stringent) restrictions for marine and coastal recreational businesses.

**Figure 29:** Rating of the Government’s Handling of the Pandemic in Relation to Tourism Supports

n=53



### Outlook for the future of marine and coastal recreation tourism businesses

In the final section of the survey, respondents were asked a series of questions concerning their outlook for the future of the sector (Table 4). In the first of these questions, respondents were asked what impact they expect several issues may have on their business over the next 12 months. The respondents were given a scale of possible responses ranging from “large negative impact” to “large positive impact”. There was also a “not applicable” option. The first two of these items referred to the reintroduction of COVID-19 related restrictions. In relation to the reintroduction of COVID-19 travel restrictions, about 35% of respondents selected “no impact” or “not applicable”. In both cases these respondents did not believe COVID-19 related restrictions would be reintroduced. The respondents

who selected other options were also doubtful that restrictions would be reintroduced but answered the question under the condition that the restrictions were reintroduced. In those cases, about 47% of the respondents believed it would have a “large negative impact” and 16% said it would have a “small negative impact”. One person selected a “large positive impact” reflecting that their business did better during the COVID-19 pandemic than it had in any other period.

**Table 4:** Impact of Issues on the Respondent’s Business over the next 12 Months

n=54

	Large Negative Impact	Small Negative Impact	No Impact	Small Positive Impact	Large Positive Impact	Not Applicable
Reintroduction of COVID-19 travel restrictions	47%	16%	27%	0%	2%	9%
Reduced overseas tourist demand related to the COVID-19	47%	27%	18%	0%	2%	7%
Reduced domestic tourism demand due rising cost of living	72%	21%	8%	0%	0%	0%
Difficulty getting staff	30%	23%	32%	0%	0%	15%
Difficulty getting adequately trained staff	32%	30%	26%	0%	0%	11%
Difficulty retaining staff	25%	19%	38%	0%	0%	19%
Higher cost of labour	37%	35%	15%	0%	0%	13%
Difficulty getting stock	9%	15%	40%	2%	0%	34%
Higher cost of stock	21%	30%	17%	0%	0%	32%
Fuel costs	43%	49%	8%	0%	0%	0%
Insurance costs	49%	34%	15%	2%	0%	0%
Availability of accommodation for clients	46%	24%	18%	0%	0%	12%
Cost of leasing	13%	11%	34%	0%	0%	42%

Respondents were next asked their opinion on what impact overseas travel restrictions to Ireland might have on their business. Like the previous item, 47% of the respondents thought this would have a large negative impact on their business. However, discussion with respondents suggested that the impact would not be as drastic as a restriction on domestic travel due to many businesses reliance on domestic tourism.



Unlike the COVID-19 related items, reduced domestic demand due to the rising cost of living was viewed by some as a serious current impediment to their business. Some respondents who were contacted after the summer period discussed the impact of the rising cost of living on domestic tourism in 2023. However, they often noted that other factors affected domestic tourism in 2023, in particular the poor weather in July and August. In any case, 93% stated they believed the rising cost of living would have either a large negative or small negative impact on their business over the next 12 months.

Only 53% of respondents believed difficulty getting staff would have a negative impact on their business over the next 12 months. In part, this is due to several businesses being run and operated by one individual with no plans to employ other staff. As discussed previously, there are several issues related to staffing facing marine and coastal recreation tourism businesses. When discussing staffing during this section, respondents often mentioned how the accommodation crisis has affected their ability to get staff as there is either no accommodation in their location or no affordable accommodation.

Difficulty retaining staff was seen as less of a problem than getting staff with 44% thinking it would have a large or small negative impact on their business. Many respondents said that their staff, once hired, would tend to stay with them for a few seasons. As such, retaining staff is seen as less of an issue than hiring staff. Some respondents still found it difficult, however, given the rising costs associated with working in popular tourist locations.

Higher cost of labour was rated negatively by 72% of the respondents. These types of jobs are often filled by minimum wage staff. Consequently, the increase in the minimum wage has directly affected many of the respondents. Some respondents also indicated that a rise in the minimum wage meant that other staff earning more than the minimum wage were also given an equivalent pay increase. Consequently, staffing costs went up for most employees not solely those on the minimum wage.

The stock related items<sup>4</sup>; difficulty getting stock and higher cost of stock, often provoked comments about Brexit and its impact on the industry. For businesses that tended to acquire stock from Britain, Brexit and the associated change in customs duties and the flow of items coming in from Britain is viewed as an ongoing concern. However, many recreation tourism businesses did not purchase stock or get stock extremely infrequently and, as such, changes in the cost of these items had little effect on their businesses.

Fuel costs were viewed as having an ongoing negative impact on the businesses of the respondents. This is of little surprise given the high cost of fuel in 2022 and 2023 in comparison to previous years. As might be expected, those affected most severely are the businesses that use the largest amounts of fuel, in particular boat tour operators.

Insurance costs were expected to have a negative effect by 83% of respondents. Some respondents stated that their insurance costs had remained the same as the previous year, with one respondent indicating the insurance cost for their business had fallen. However, this is not to suggest that insurance costs are viewed as acceptable, just that the rate of increase has slowed. Many respondents reported a very high cost of insurance and even a large increase in the cost of insurance with others indicating that the inability to get insurance for certain activities has affected the growth of their business.

Seventy percent of the respondents thought the availability of accommodation would have a negative impact on their business over the next 12 months. As may be expected, respondents discussed the lack of availability of accommodation as a consequence of the recent influx of those seeking emergency accommodation. Likewise, respondents discussed the cost of accommodation. In many cases, where there is accommodation, costs have become prohibitive for many potential customers.

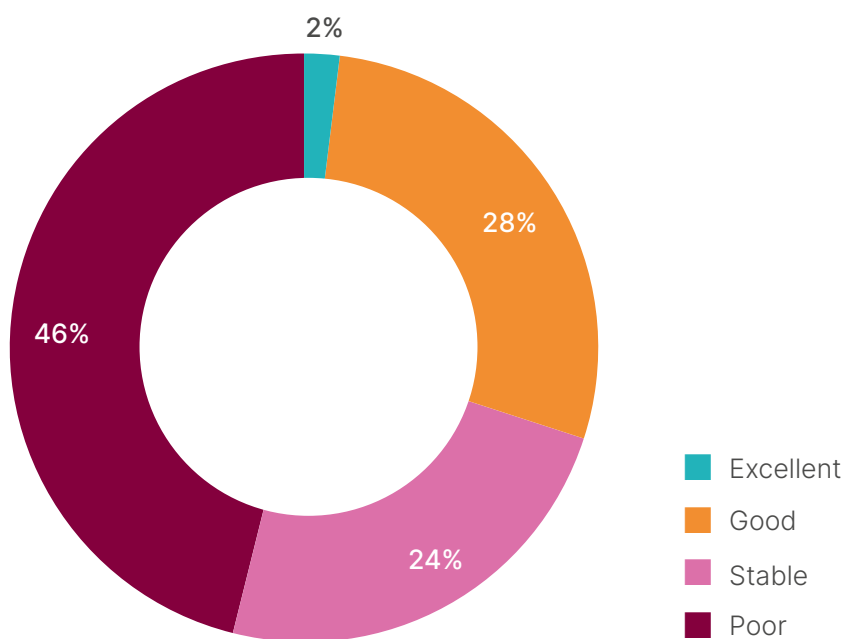
4. For most businesses stock refers to equipment and specialist items they sell to customers.

This may have the effect of altering the demographics of tourists who visit marine locations. As such, this could result in less family adventure-oriented tourism and larger numbers of older tourists looking for more leisurely tourism experiences. This may not be a negative for the tourism sector as a whole but may have an impact on adventure tourism or specific marine recreation businesses.

The cost of leasing did not seem to affect the sample too negatively. In most cases, the respondent owned the land, buildings and equipment they used or they did not operate from a fixed premise. However, for some, the cost of leasing has become a new problem. The creation of surf centres has been beneficial in some ways but has also brought with them a large financial cost in comparison to operating a surf school without a fixed premises. Consequently, these businesses need to attract more customers than before to break even. This may affect some businesses if new customers cannot be attracted.

Finally, the respondents were asked two questions about the sector. Firstly, they were asked “What is their expected growth for the sector as a whole in 2023?” (Figure 30). The responses overall were fairly negative. Approximately 70% of the sample stated that they expected poor or stable growth for the sector, leaving the remaining 30% with an expectation of good or excellent growth. As a reminder, data collection took place both before the summer of 2023 and after the summer of 2023. Splitting the sample into a before summer group and an after summer group, as presented in Figure 31, may give a better understanding of how many respondents viewed the summer months of 2023.

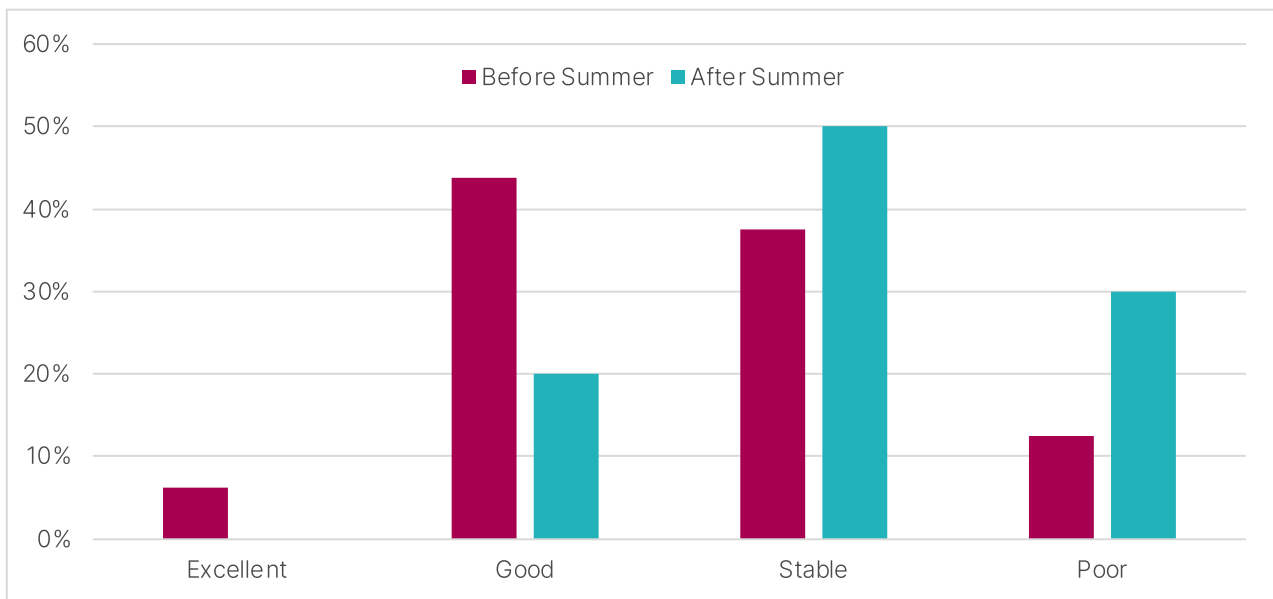
**Figure 30:** Expected Growth of the Marine and Coastal Recreational Tourism Sector for 2023 *n*=46



Nearly 50% of the before summer group were expecting good or excellent growth for 2023 while only 20% of the after summer group were expecting good growth (Figure 31). Not one respondent expected excellent growth. It is likely that the after summer cohort is more reflective of the actual growth expectation for 2023, simply because they had more information than the before summer group. This would suggest that growth for marine and coastal recreational tourism sector may be poor for 2023. The final question asked of the respondents was “How likely is your business to survive the next 12 months.” The average response was 8.8 out of 10. It would seem, despite the challenges these businesses face most expect to survive at least another year.

**Figure 31:** Expected Growth Comparing Responses Collected Before Summer and After Summer

n=46



Respondents were also given the opportunity to add any further comments to the survey about any issues that had not already been raised. Most of the respondents discussed issues as they went through the survey with the interviewer (these opinions have been shared throughout this report) so when it came to this final open ended question they often had nothing left to add. However, there is a final issue that was brought up that has not been discussed thoroughly to this point.

Many respondents discussed a clear and visible reduction in the quantity and diversity of wildlife species in comparison to previous years. They discussed having to travel further to see wildlife that would normally be seen closer to mainland Ireland. In many cases, respondents did not indicate a clear reason for the absence of wildlife. However, in relation to some geographic locations respondents suggested a link between the overfishing of sprat and a reduction in whale and other wildlife sightings near the coast. These respondents were of the opinion that sprat overfishing has been allowed to be conducted despite the environmental and economic damage that is occurring as a direct result. They believe that continued overfishing of sprat will lead to irreversible damage to Ireland's marine wildlife and, as such, needs to be tackled.



## 5. Conclusion

Marine and coastal recreational tourism providers have faced several difficulties over the last number of years. It would seem, from the data collected here, that some of these issues persisted into 2022 including the effects of COVID-19 and the associated restrictions. Most notably, turnover and operating profit were down in both nominal and real terms. Respondents also indicated that 2023 might be another poor year for the sector owing to the accommodation crisis and weather conditions. Although, from the perspective of many, COVID-19 no longer poses an existential risk to their business, there are still many challenges that could prove problematic.

As discussed at great length in the Irish media, the modus operandi of insurance companies in Ireland affects not only the costs of doing business but indeed the tourism product offered by recreational businesses. In comparison to other European countries, Irish businesses pay significantly higher premiums per annum. Several attempts have been made to bring the cost to Irish businesses in-line with continental Europe with limited success. What has been discussed less often is the inability to offer certain activities due to insurance cover being unavailable for those activities. According to the respondents, there is considerable demand for these activities if they could be offered. This suggests that the product provided by Irish tourism providers is not meeting customers' wants as a direct consequence of an inability to get insurance for certain activities. As such, the call for a more competitive insurance market is entirely justified.

Another clear impediment to the development and, indeed, preservation of the sector is the accommodation crisis. The accommodation crisis has two direct and distinct effects on marine and coastal recreational businesses. Firstly, on the demand side, the accommodation crisis has had a direct impact on the number of tourists coming to Ireland as well as the type of customer. Recent Fáilte Ireland statistics have indicated that recreational tourism (all recreational tourism not just marine and coastal) is disproportionately affected by the accommodation crisis and the associated rising cost of a holiday in Ireland. Quite simply, fewer people were undertaking recreational trips in 2023<sup>5</sup>. Fáilte Ireland have also suggested there has been a change in the number of visitors from traditionally strong overseas countries. It is worth considering how these changes will affect the providers of certain activities, given that some activities are undertaken more prominently by tourists from specific nations. For example, the British and European angling scene in Ireland is very strong. A fall in tourists from these countries might, therefore, have a larger impact on providers of sea angling trips in comparison to other recreational tourism providers.

Although it is difficult to offer a solution to the shortage of beds in coastal areas over the short term, there are means of increasing marine recreation client numbers. Day-trippers and school tours could be an invaluable source of income for many of these businesses. In particular, day-trippers are to some extent ignored by Irish national tourism strategy as previous targets have focused on an increase in tourist activity which does not include day-trippers (Inter-Departmental Marine Coordination Group 2012). Likewise, Fáilte Ireland's reported tourism figures do not include day-trippers, only those that have spent a night away from their home. The promotion of day-trips for marine recreational pursuits to Irish residents could increase demand for the marine recreation product offerings without increasing demand for bed spaces. State-sponsored school trips to approved businesses could also provide benefits to businesses and pupils alike.

Many young people living in Ireland, despite living on an island, have limited experience with the marine environment. School trips given by marine recreational businesses could provide practical and educational experiences of Ireland's coastal habitats and ecosystems to young people living in Ireland. From the operators' perspective, this would also generate additional business in those vital shoulder months. Additionally, previous research has demonstrated that Irish people who directly engage in marine activities take more trips to the coast and spend more money than those who do not (Hynes

5. Fáilte Ireland also recognises the poor weather during the peak season of 2023.



et al. 2019, 2020). Therefore, early adoption through schools could offer potential long-term benefits to the marine recreation activities businesses.

The second issue related to the accommodation crisis is an inability to house staff. The cost of accommodation in tourist locations now far exceeds the wages that can be offered to employees in the industry. In the current climate, businesses that can offer accommodation to employees on site will have a distinct advantage. Some businesses have been able to purchase caravans to offer as accommodation for their staff but this will not be a viable solution for many. Businesses close to colleges and universities may be able to rent dorms and organise daily buses for seasonal staff. However, this is unlikely to work for more rural businesses, the ones that are often hit hardest, in some senses, by the accommodation crisis. As such, rural businesses are limited to people living in the local area as potential members of staff. This need for staff may be somewhat reduced by offering training through schools in select geographic locations where marine and coastal recreational businesses already exist.

With respect to staff, many respondents also noted the difficulty in getting adequately trained staff. This includes an inability to find staff with basic and more advanced technical skills. As highlighted earlier, most businesses offer some form of training and instruction as part of their services. Therefore, having adequately trained staff is vital. Consequently, greater promotion and availability of not only basic training but also more advanced training that allows businesses to offer a wider range of activities should be made a greater priority. It needs to be recognised that a greater number of new trainees are required than had been in previous years due to a loss of experienced personnel during COVID-19.

In addition to the ability to hire well-trained staff, respondents spoke about the rising cost of labour. Respondents discussed the fact that as the payments to minimum wage staff increases so do the payments to those on higher wages. For example, if minimum wage increases by €1 so too will the payments given to those on higher wages. The rising cost of labour has recently been examined in a report titled "Analysis of government induced costs on tourism & hospitality enterprises" (Power, 2024). Amongst the suggestions made by Power (2024) to tackle increasing labour cost was the reinstatement of the 9% tax rate. A reintroduction of the 9% tax rate may help to alleviate some of the impacts of the rising cost of labour as well as other increasing expenses such as fuel and insurance.

Another issue facing marine and coastal recreational tourism operators is climate change. However, Ireland, although often windy and wet, has not become, nor is it likely to become, extremely inhospitable in any months of the year. As such, Ireland could have a relative advantage over other some other popular European tourism destinations. If climatic conditions continue as are, or worsen, Ireland could see a large influx of people who would have otherwise gone to warmer countries that have become too hot during July and August.

Under current climate change scenarios Ireland is likely to experience an increase in the number of "wet" and "very wet" days (Nolan and Flanagan 2020). As such, a literal "rainy day fund" may be needed for recreational tourism providers to allow them to adapt to wetter and windier summers. For some, the impacts will have a relatively low cost and may be as simple as the ability to offer waterproof gear for a rainy coastal walk. Others may need to be able to offer alternative activities if conditions are bad or they may need improved equipment to brave heavier weather conditions. The needs of these businesses will be almost entirely individual as they will be dependent on the activities the business provides, the location of the business and how they plan to keep their customers happy even during poorer weather conditions. As such, any funds should be distributed based on the demonstrated plans and needs of each business. However, overall, if Ireland can prove that it is a fun and vibrant location for marine recreational pursuits, even on wetter days, then there is a path to future tourism success that most other countries should be envious of.



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