NUI Galway
OÉ Gaillimh

Whitaker Institute

A Survey of Domestic Coastal and Marine Tourism and Leisure Activity in Ireland

SEMRU
Socio-Economic Marine Research Unit

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SEMRU

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

Acknowledgments

The authors would like to thank Professor Michael Cuddy for helpful comments on earlier drafts of this report.

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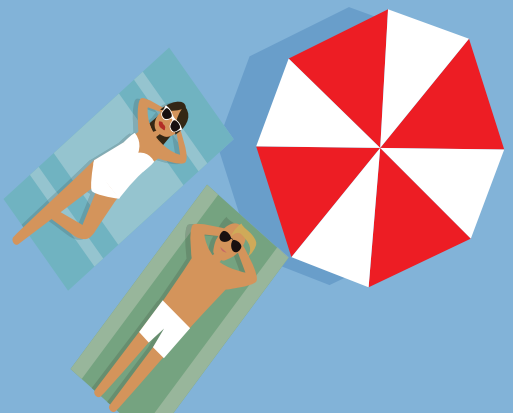


Executive Summary

SEMRU, at NUI Galway, carried out a survey of domestic residents in Ireland in 2019 as part of the Marine Institute's funded project "Valuing and understanding the dynamics of Ireland's Ocean Economy" (PBA/SE/16/01). The purpose of the household survey was to profile the domestic market for single day trips (leisure) and overnight trips (tourism) for coastal and marine related activities in Ireland. The results of the survey are also used to estimate what proportion of an Irish resident's total domestic tourism expenditure is in coastal areas (coastal tourism) and what proportion is spent on undertaking marine related activities (marine tourism). The survey complements SEMRU's overseas marine tourism report published in 2019, where the demand for the same activities as analysed here was also examined amongst overseas visitors to Ireland[1].

IN SUMMARY, THE REPORT AIMS TO:

- Provide statistical information on participation rates amongst domestic residents in 20 marine activities;
- Examine the spatial distribution of domestic tourism participation in marine activities;
- Provide estimates of domestic coastal and marine tourism expenditures;
- Estimate the contribution of coastal and marine based tourism to total tourism revenue by combining the domestic tourism estimates produced here with previously estimated figures for overseas tourism;
- Evaluate the level of satisfaction amongst domestic tourists with coastal and marine activity facilities.

In the final sample of 1,004 Irish residents, 770 individuals (77%) had actively engaged in marine based activities, on either day or overnight trips, during the previous year, 2018. Four hundred and one individuals had participated in water-based activities. The rate of participation in marine activities on just overnight coastal trips was less at 43% and the rate of participation in water-based activities for overnight trips was also less at 24%. The most popular land-based marine related activities are walking/running along the coast/beach/cliffs/etc., beach or seaside trips, and coastal sightseeing. The most popular water-based activities are sea swimming, surfing, recreational boating of different types and sea angling.

[1] Hynes, S., Aymelek, M., Corless, R. and Evers, N. (2019). A Survey of Marine and Coastal Overseas Tourism Activity in Ireland, SEMRU Report Series, http://www.nuigalway.ie/media/researchsites/semru/files/SEMRU-Overseas-Marine-Tourism-Report_Final1.pdf

Domestic Tourism Market (Holiday trips or visiting friends/family) (Fáilte Ireland, 2019)

9,082,000 trips

€1,585.5m

Domestic tourism in coastal areas

3,905,000 trips

€698m

Domestic marine tourism

1,523,000 trips

€381m

The average expenditure per coastal day trip in 2018 was calculated at €95. The equivalent for coastal overnight trips was €310. The estimated water-based activity expenditure per person per trip across the sample was €56 rising to €73 for the subsample that actually undertake water-based activities on their coastal visits. The results also indicate that domestic tourists undertake the majority of their marine activities on the West and South coasts of Ireland and that there are notable differences in participation rates across age groupings, social classes and by family make up.

A domestic tourist is defined in this report as a person who spends at least one night away from home on their trip. Total expenditure by domestic tourists in coastal areas was estimated to be €698 million in 2018, which represents 35% of the total expenditure by domestic tourists (using the broader Fáilte Ireland measure for domestic tourists that includes business trips equating to 10.92 million in total trips and €2,006 million in total revenue). The marine related activity expenditure, or what might truly be referred to as domestic marine tourism, is estimated to generate revenue of €381 million with €172 million being spent on water-based activities. Marine tourism makes up an estimated 19% of total domestic tourism expenditure.

The analysis presented in the report on the domestic coastal and marine tourism market and the marine related activities undertaken by Irish residents should provide useful information to both public and private bodies with an interest in marine based tourism, sports and leisure activities. The information should also assist policy makers in developing a sustainable long-term strategy for domestic marine tourism in Ireland. Coupled with the spatial analysis from the previous overseas marine tourism report the equivalent analysis presented here for domestic tourism should also be useful in the ongoing development of the National Marine Planning Framework.

Glossary of key terms

A **tourist** is defined as a visitor whose trip includes an overnight stay away from their usual place of residence

A **day trip** involves the pursuit of a coastal or marine leisure activity away from home but where the individual returns to their place of residence that same night (no overnight stay involved). A day trip could for example be anything from a one hour visit to a local beach to go for a swim to a full day spent sightseeing along the coast

Domestic tourism refers to overnight trips away from home by Irish residents where the visit is to somewhere else in the Republic of Ireland

Domestic tourism in coastal areas (or sometimes *domestic coastal tourism*) refers to overnight trips away from home by Irish residents where the visit is to a coastal area in the Republic of Ireland. It refers to any tourism activity that takes place in the coastal area, whether connected to the sea or not. The final decision as to whether the area where their activities were undertaken was coastal or not was left to the respondent.

Domestic marine tourism refers to overnight trips away from home by Irish residents where the visit is to a coastal area in the Republic of Ireland and where the visit involves sea-based activities such as swimming, surfing, boating, yachting, cruising, sea kayaking, diving and other nautical sports, or coastal land-based activities, including beach activities, sun bathing, marine related sight-seeing and other coastal recreation activities taking place on the coast for which proximity to the sea is a necessity.

A **coastal trip maker** is someone who actually undertook a day or overnight coastal trip during the year

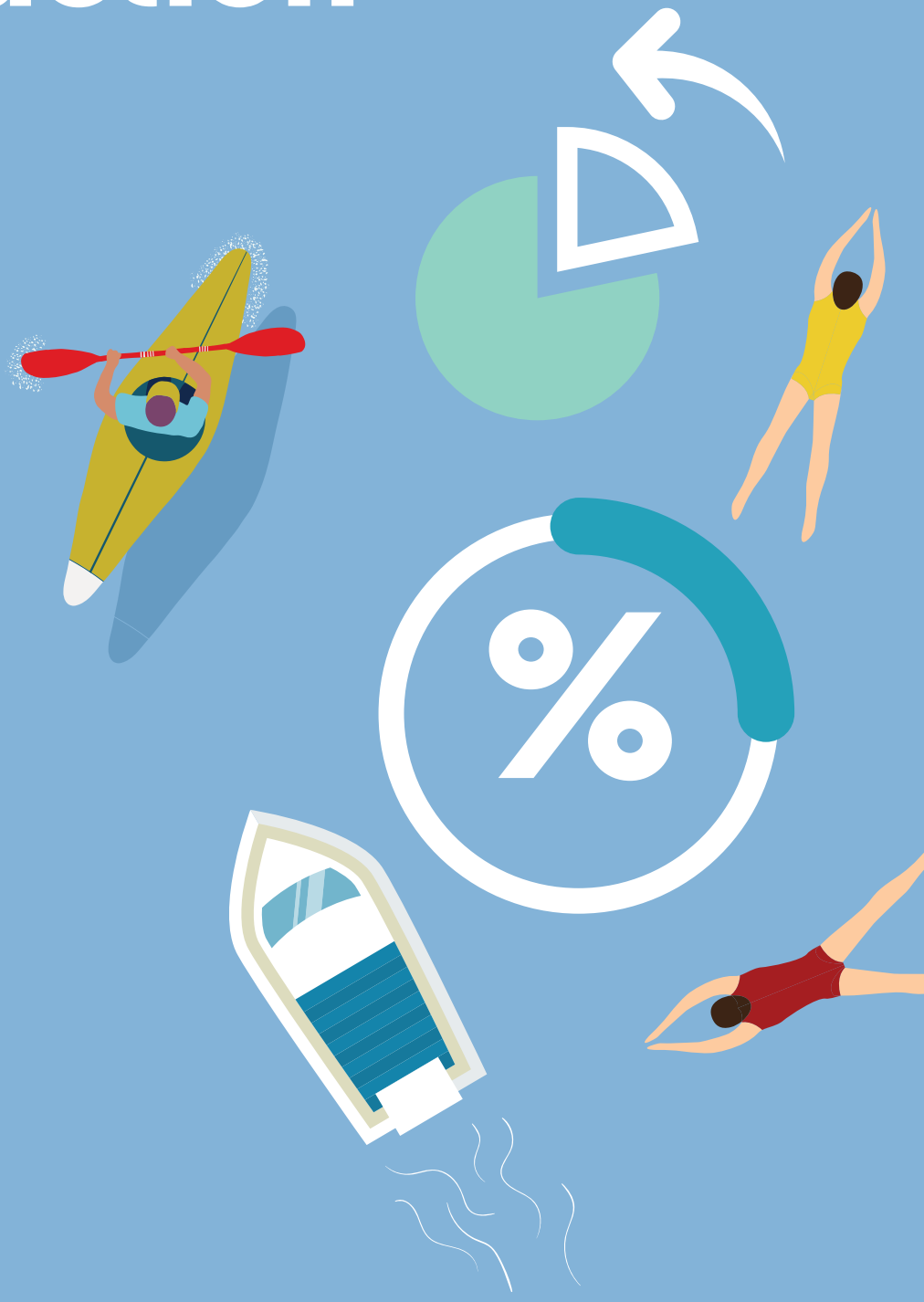
A **coastal area** is defined for this study as a coastal city, town, village or rural area adjacent to the sea. The final decision as to whether the area where they visited was coastal or not was left to the respondent.

Marine activities refers to sea-based activities such as swimming, surfing, boating, yachting, cruising, sea kayaking, diving and other nautical sports, as well as land-based activities, including beach activities, sun bathing, marine related sight-seeing and other coastal recreation activities taking place on the coast for which proximity to the sea is a necessity (see Table 2 for further breakdown).

Water-based activities are a subset of the activities in the marine activities category. They refer specifically to sea-based activities where there is direct contact between the participant and the water (see Table 2 for further breakdown).

Total expenditure by domestic tourists in coastal areas was estimated to be **€698 million** in 2018

01
Introduction



According to the latest figures from Fáilte Ireland (FI), Ireland's main tourism development body, expenditure by tourists visiting Ireland was approximately €5.6 billion[2] in 2018, which was 6% up on 2017[3]. Combining the expenditure by overseas and Northern Irish tourists with the money spent by Irish residents taking trips at home and receipts paid to Irish carriers by foreign visitors, total tourism expenditure in 2018 was estimated by FI to be €9.4 billion.

Tourism is an important economic activity in Ireland, and it is particularly important for the country's maritime and coastal regions and the offshore inhabited islands. Visitors consume tourism products where they are available and Ireland's coastal landscape, promoted by initiatives like the Wild Atlantic Way (WAW), is a key attraction for many tourists. Consequently, marine and coastal tourism have a significant regional distributive effect in providing economic activity in areas that often may not have many other income earning opportunities. Figures from SEMRU's latest ocean economy report suggest that tourism and leisure in marine and coastal areas is one of the key industries contributing to Ireland's ocean and coastal economy. It supports approximately 50% of all jobs in the ocean economy and is the second most important sector in the ocean economy, behind shipping and maritime transport, in terms of turnover and gross value added[4].

In 2019 SEMRU produced estimates of the value of coastal and marine *overseas* tourism activities in Ireland in 2018, which was based on information provided by overseas visitors in a survey conducted in August and September 2018[5]. Those results highlighted the important contribution that marine related activities make to both local coastal economies and to the national economy. The analysis indicated that total overseas coastal tourism expenditure was approximately €1.9 billion in 2018, while overseas marine tourism generated €650 million. To complete the picture from a demand

[2] This figure excludes receipts paid to Irish carriers by foreign visitors.

[3] Fáilte Ireland (2019). Key tourism facts 2018, Fáilte Ireland Publication, Dublin https://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3_Research_Insights/Key-Tourism-Facts-2018.pdf?ext=.pdf

[4] Tsakiridis, A., Aymelek, M., Norton, D., Burger, R., O'Leary, J., Corless, R. & Hynes, S. (2019). Ireland's Ocean Economy Report 2019, Ireland's Ocean Economy, SEMRU Report Series, http://www.nuigalway.ie/media/researchsites/semru/files/Irelands-Ocean-Economy-Report_for-web_final.pdf

[5] Hynes, S., Aymelek, M., Corless, R. and Evers, N. (2019). A Survey of Marine and Coastal Overseas Tourism Activity in Ireland, SEMRU Report Series, http://www.nuigalway.ie/media/researchsites/semru/files/SEMRU-Overseas-Marine-Tourism-Report-Final1.pdf

perspective, it is, also, important to consider the marine and coastal leisure and tourism activity of domestic residents in Ireland. It is essential for national and regional marine tourism policy formulation to have detailed information on the total economic significance of marine related tourism, which requires an analysis of domestic resident marine and coastal tourism activities similar to that conducted for overseas visitors.

Within this report, domestic coastal and marine tourism expenditure is estimated using the results of a survey of 1,014 residents in Ireland (final sample used was 1,004). The survey instrument was developed by SEMRU following best practice and a survey company, RedC, was employed to collect the data from households in the Republic of Ireland. This report adds to the body of work described above by examining the spatial distribution of domestic tourists' marine activity in Ireland and by estimating the contribution of the 'marine' to total domestic leisure and tourism expenditure. Furthermore, there is a distinction made between coastal and marine tourism.

As was the case in the overseas tourism survey and report, the definitions used for coastal tourism, marine tourism and water-based activity tourism in the domestic survey instrument presented to households were:

TOURISM IN COASTAL AREAS

or coastal tourism, refers to any tourism activity that takes place in a coastal city, town, village or rural area close to the sea. The final decision as to whether the area where their activities were undertaken was coastal or not was left to the respondent.

MARINE TOURISM

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

WATER BASED ACTIVITY TOURISM

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

To be defined as a **tourist** the individual must have spent at least one night away from home on their trip, as holidaymakers or for the purpose of visiting family/friends. The report does however also report on day trips for leisure under the above categories (coastal, marine and water-based) and total expenditure per activity per day or overnight trip.

The remainder of the report is laid out as follows: A summary of previous research on domestic marine leisure and tourism is presented in section 2; the study methodology, the questionnaire design, data collection and the analysis process are outlined and reviewed in Section 3; the results of the survey are presented and analysed in Section 4; and some limitations of the survey, policy recommendations and final conclusions are set out in Section 5.

Total tourism expenditure in 2018 was estimated by Fáilte Ireland to be **€9.4 billion**

02

Domestic Tourism in Ireland

The main sources of data on domestic tourism numbers and activities in Ireland are FI's annual reports and the Central Statistics Office's (CSO) Household Travel Survey (HTS). The HTS measures domestic and foreign travel patterns of Irish residents, including overnight stays and associated details (expenditure, purpose of trip, type of accommodation used, average length of stay)[6]. The most recent FI report[7], which relies on the CSO HTS results, demonstrates the important contribution that domestic tourism makes to the total tourism revenue in Ireland:

- 10.92 million domestic tourism trips (including those on business) took place in Ireland in 2018, representing a growth of 13% on 2017;
- Total domestic tourism expenditure also grew by an estimated 7% to €2,006 million;
- Every €1 million of tourist expenditure helps to support 27 tourism jobs;
- For every €1 spent on tourism (domestic and overseas), 23 cent is generated in tax.

Holidaymakers, and domestic tourists classified as visiting family/friends in 2018 generated 9.08 million domestic tourism trips and €1,585.5 million in expenditure (The remainder of the 10.92 million domestic tourism trips (1.84 million) are classified as 'Business' and 'Other' by FI). Only 19% of holiday trips were for 4 nights or longer in duration. The majority of holiday trips (81%) were for shorter breaks of 1-3 nights. In terms of accommodation FI estimates suggest that the majority of holiday makers appear to stay in hotels (37%) followed by holiday homes (21%) self-catering (19%) and caravan/camping (10%).

As can be seen in Figure 1, there has been steady growth in domestic tourism since 2012. The rate of growth in total trips was, however, greater than the growth in total expenditure in the 2017 to 2018 period. Note, it is not possible to directly compare pre and post 2012 HTS statistics as there were revisions to the way that domestic travel data was calculated from 2012 onwards as a result of a change to the weighting methodology used. Nevertheless, from earlier CSO HTS reports it can be seen that there was a fall in both the number of total domestic tourism trips and total domestic expenditure from 2008 to 2012 before a recovery thereafter. This general growth pattern was similar for overseas tourism in the same periods.

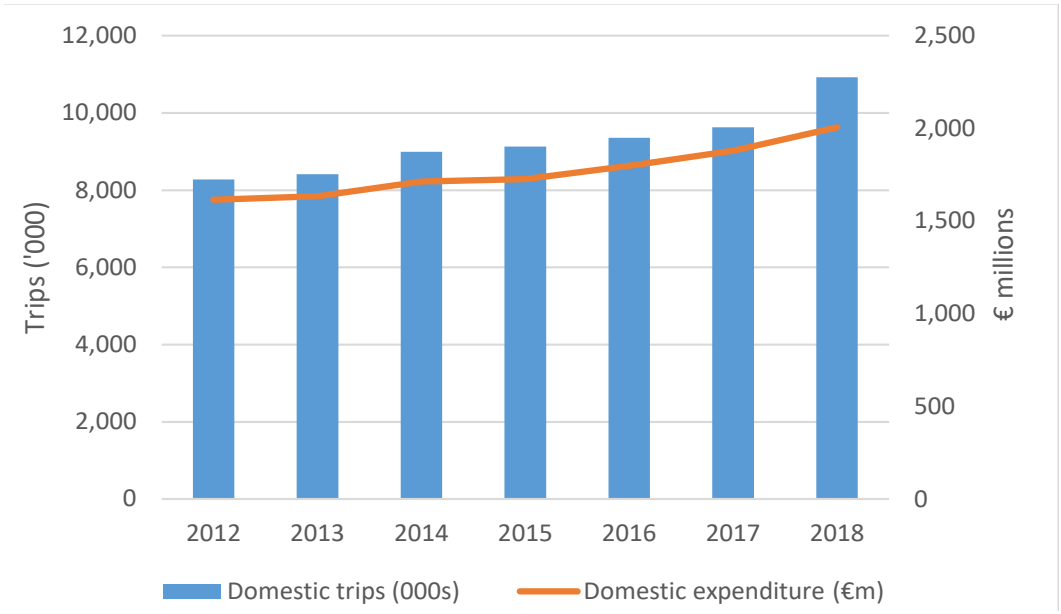
While annual figures and reports are produced by the CSO and FI for the overall domestic tourism market, information on marine and coastal specific domestic tourism activity is more difficult to obtain. SEMRU produces biennial estimates for *tourism and leisure in coastal and marine areas* but these figures do not distinguish between domestic and foreign visitors. According to SEMRU's latest ocean economy report[8], the estimated turnover generated by *tourism and leisure in coastal and marine areas* in 2018 was €1,254 million. The corresponding gross value added (GVA) was €648 million and the sector employed 18,107 full time equivalent individuals.

[6] Data for the HTS is collected via a postal survey which is conducted on a monthly basis. Every month, over 4,600 households (or approximately 0.3% of all private households) are randomly selected from the Electoral Register, where the selection is stratified by District Electoral Division.

[7] Fáilte Ireland (2019). Key Tourism Facts 2018, September 2019 Issue. https://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3_Research_Insights/Key-Tourism-Facts-2018.pdf?ext=.pdf

[8] Tsakiridis, A., Aymelek, M., Norton, D., Burger, R., O'Leary, J., Corless, R. & Hynes, S. (2019). Ireland's Ocean Economy Report 2019, Ireland's Ocean Economy, SEMRU Report Series, http://www.nuigalway.ie/media/researchsites/semru/files/Irelands-Ocean-Economy-Report_for-web_final.pdf

Figure 1. Total Domestic Trips and Total Domestic Expenditure



(Source: CSO Household Travel Survey, various years. Includes all domestic overnight trips; holiday makers, visiting friend/ family, business and other reasons for travel)

A limited number of other reports have been carried out in Ireland that specifically examined domestic resident's use of the marine environment for leisure activities. Early work by Whelan (1997)[9] examined national participation rates for a range of water-based pursuits. The ERSI (2004)[10] also focused on water-based (both marine and freshwater) recreational activities and found that approximately 1,475,000 people participated in water-based recreational activities in 2003. That study found that the most popular activity was trips to the seaside/beach (1,134,000 participants) followed by swimming in the sea (353,000 participants). Sport Ireland also produces regular 'Irish Sports Monitor Reports' that monitor and track adult participation in sport in Ireland. While there is not a great deal of marine related activities recorded in these reports, the most recent report[11] indicates that 9.3% of all recreational walking takes place at beaches or seafronts. It also highlights swimming as the second most popular form of sporting activity undertaken by Irish residents but does not distinguish between indoor and outdoor swimming.

A more recent survey by SEMRU of the Irish population's coastal and marine based recreational activities was carried out in 2012. A total of 812 people, aged 18 and over, were surveyed. Respondents were asked a number of questions related to visits to the Irish coastline during the previous year. The survey found that during the previous 12 months, 73% of respondents visited the coastline at least once and 38% visited the coastline more than ten times. Norton et al. (2018)[12] compared the results of the 2012 study with previous research on marine activity participation rates

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

[10] ESRI (2004). A National Survey of Water-based Leisure Activities in Ireland in 2003. ESRI Report, Dublin.[Available online: https://www.esri.ie/pubs/BKMNEXT62.pdf]

[11] Sport Ireland (2019). 2017 Irish Sports Monitor survey, Sport Ireland Publication, https://assets.gov.

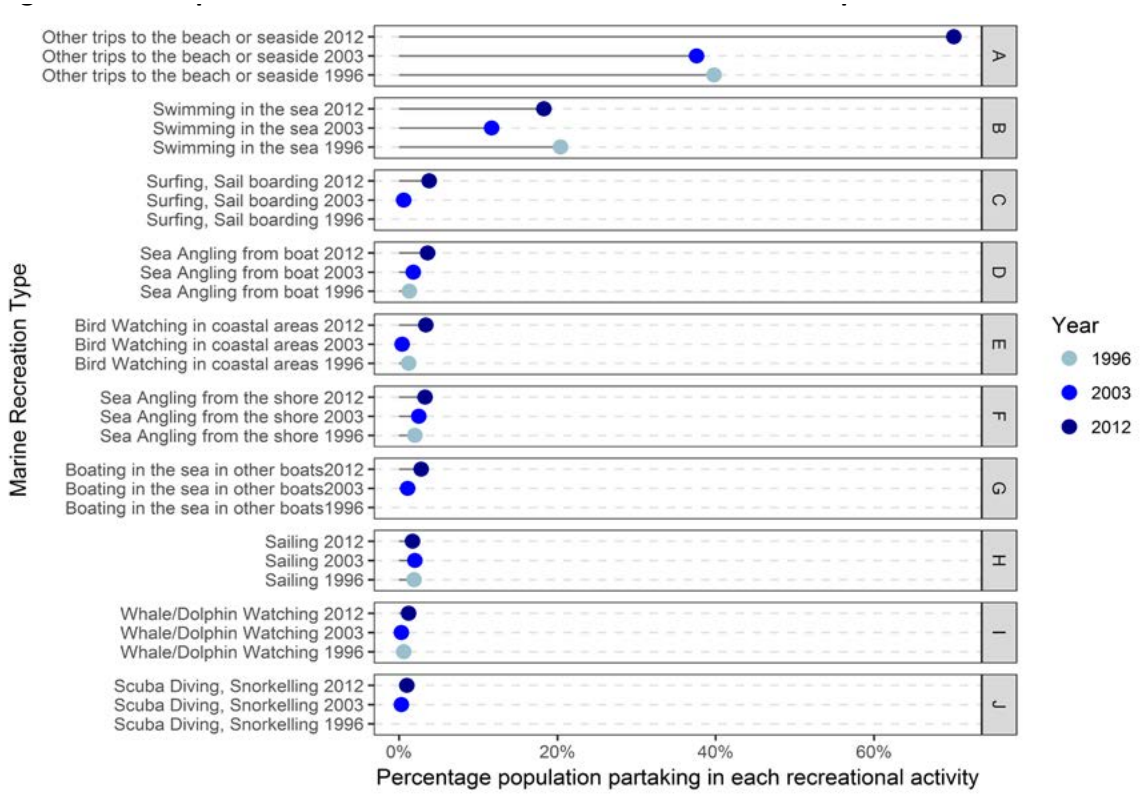
[12] Norton, D., Hynes, S. and Boyd, J. (2018). EPA Research Report No 239: Valuing Ireland's Coastal, Marine and Estuarine Ecosystem Services, EPA Publications, Wexford. http://www.epa.ie/pubs/reports/research/water/research239.html ie/16014/3abf58a4a5af41b9ab66065de65e15a3.pdf

carried out by the ERSI in 1996 (Whelan, 1997) and 2003 (ESRI, 2004; William and Ryan, 2004)[13]. Comparisons in participation rates per activity in the respective years are reproduced below (Figure 2).

As noted by Norton et al. (2018) the participation rates for most of the marine related recreation activities are comparable across all three years but there was a significant increase in the number of the population participating in the general category of "other trips to the seaside or beach" in 2012. The authors speculated that this may be due to an observed reduction in gym membership and an accompanying increase in the number of people "undertaking 'free' outdoor recreation following the onset of the great recession in late 2007". This fact was also noted in the Irish Sports Monitor Report, 2009.

Based on the 2012 survey results, Norton et al. (2018) estimated the annual aggregate recreational welfare value obtained by Irish society from Ireland's marine resources at €1.7 billion. The per trip welfare estimates were established from the literature and calculations from a marine recreation value meta-analysis[14].

Figure 2. Participation rates in marine recreation in Ireland from 3 previous studies



Source: Reproduced with permission from Norton et al. (2018).

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

[14] Hynes, S., Ghermandi, A., Norton, D. and Williams, H. (2018). Marine Recreational Ecosystem Service Value Estimation: A Meta-Analysis with Cultural Considerations. Ecosystem Services, 31, 410-419.

Considerable research has been carried out in recent years on recreational angling. Studies in Ireland have analysed angler numbers and expenditure patterns using surveys (e.g. various Inland Fisheries Ireland (IFI) reports; Whelan and Marsh, 1988[15]) or have estimated demand functions for recreational fishing (e.g. Curtis, 2002; Hynes el al., 2015; Grilli et al. 2018a)[16]. While all of these studies have focused on freshwater angling, a number of recent studies have also examined participation in, and value of, sea angling. The latter include Grilli et al. (2018b) and Grilli et al. (2019)[17], focussing on sea bass angling, while a study by Hynes et al. (2017)[18] estimated a demand function for sea angling in Irish marine waters. The previously mentioned IFI (2013) report (see footnote 15) also reviewed sea angling as one of the angling categories. It highlighted, in particular, the fact that bass anglers had the second highest expenditure per trip across seven different angler categories.

In related research, a number of studies have examined the supply side of marine tourism products and services. The Marine Institute, for example, carried out an audit of water-based tourism and leisure activity products in 2006 (Marine Institute, 2006)[19]. The audit provided an assessment of the quantity and quality of Ireland's water-based tourism and leisure products. It identified a number of product gaps and opportunities at local, regional and national levels, with a view to informing policy and investment decisions. Also, Ginty (2010)[20] carried out an assessment of the contribution of the marine tourism sector in the West of Ireland to the regional economy and made a number of recommendations to develop and grow the sector.

Finally, in 2010 and 2014, Waterways Ireland commissioned surveys to obtain information on the socio-demographic profile of recreationalists using Irish inland waterways, in order to ascertain satisfaction levels with available facilities and to measure the level of awareness of Waterways Ireland as the management authority. The surveys were undertaken at 24 sites in the Republic of Ireland and Northern Ireland and the results were published in a number of reports. These contained summary information on recreational activity at the surveyed sites[21]. Curtis and Hynes (2017) subsequently used the same survey data to determine how water-based recreational activities in Ireland are affected by differences in water quality across recreational sites[22].

This study adds to the literature reviewed above by providing an in-depth profile of domestic marine and coastal tourism and leisure activities in Ireland. It also makes a distinction between marine and coastal tourism by domestic residents. Whereas, all tourism activity in a coastal area is considered coastal tourism, marine tourism relates only to the marine related activities of coastal tourists. This report generates numbers and expenditure estimates from participation in domestic coastal tourism, marine tourism and water-based tourism.

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[15] For full list of IFI publications see https://www.fisheriesireland.ie/publications/publications.html; IFI (2013). Socio-Economic Study of Recreational Angling in Ireland. Inland Fisheries Ireland Report, Dublin; Whelan, B., March, G. (1988). An Economic Evaluation of Irish Angling. A report prepared for the Central Fisheries Board by the Economic and Social Research Institute (ESRI), Dublin;

[16] Curtis, J. (2002). Estimating the Demand for Salmon Angling in Ireland. The Economic and Social Review, 33 (3), 319-332; Grilli, G. Curtis, J., Hynes, S. (2018a). A travel cost evaluation of the benefits of two destination salmon rivers in Ireland. Journal of Outdoor Recreation and Tourism, 23, 1-7; Hynes, S., O'Reilly, P. and Corless, R. (2015). An on-site versus a household survey approach to modelling the demand for recreational angling: Do welfare estimates differ? Ecosystem Services, 16: 136–145.

[17] Grilli, G. Curtis, J., Hynes, S. (2018b). Sea bass angling in Ireland: a structural equation model of catch and effort. Ecological Economics, 149, 285–293; Grilli, G., Curtis, J., Hynes, S. and O'Reilly P. (2019). Anglers' views on stock conservation: Sea bass angling in Ireland, Marine Policy, 99, 34-41;

[18] Hynes, S., Gaeven, R. and O'Reilly, P. (2017). Estimating a Total Demand Function for Sea Angling Pursuits. Ecological Economics, 134, 73–81

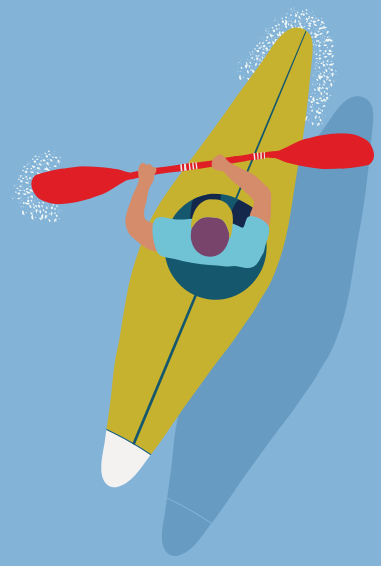
[19] Marine Institute (2006). Tourism and Leisure Product Audit. Marine Institute Publication, Galway.

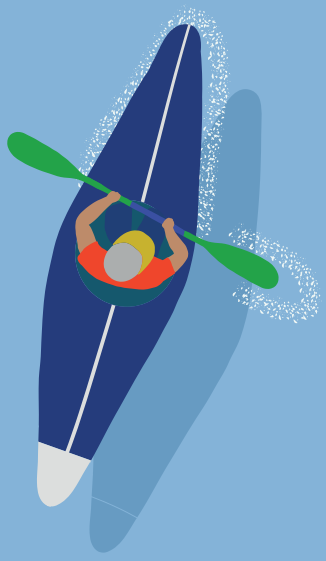
[20] Ginty, C. (2010). An examination of the Marine Tourism Business Sector in the West of Ireland: Capabilities, Performance and Contribution to the Regional Economy, PhD Thesis, Galway Mayo Institute of Technology.

[21] Amárach Research (2014). Waterway Users 2014. Waterways Ireland. Available online: https://www.waterwaysireland.org/Documents/Research/Waterway%20Users%20Research%20Report%202014.pdf and Ipsos MRBI, 2010. Waterway Users Research 2010. Waterways Ireland.

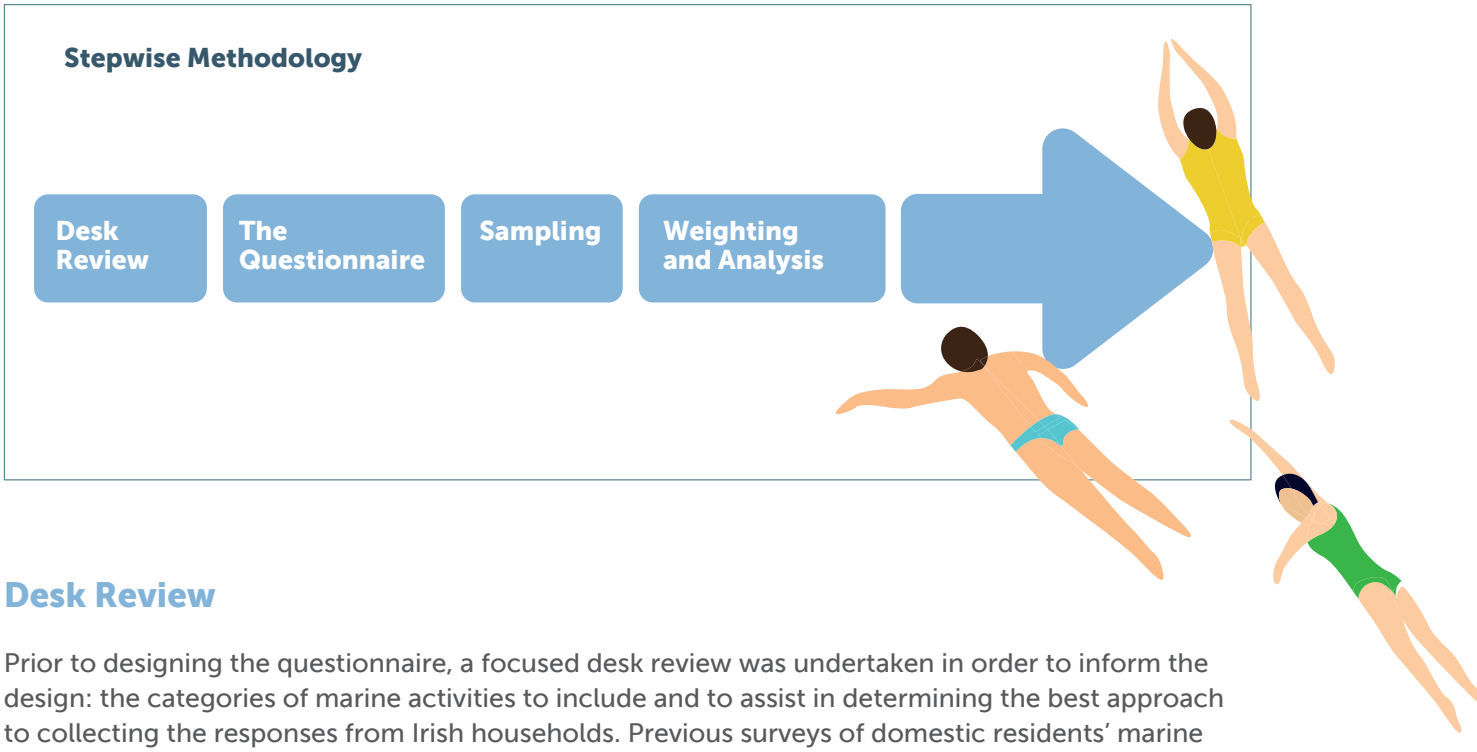
[22] Curtis, J. and Hynes, S. (2017). Demand for Water-Based Leisure Activity: the Benefits of Good Water Quality, EPA Research Report (2015-SE-DS-6), EPA Publication, Wexford. http://www.epa.ie/pubs/reports/research/water/research232.html

03
Methodology





The survey methodology was shaped with the objective of recording Irish residents' coastal and marine tourism and leisure participation and their associated expenditure. A comprehensive survey questionnaire was developed and data was collected using face-to-face interviews with selected Irish residents in their own homes. The collected sample consisted of 1,014 respondents and each survey involved an interview of approximately 10 minutes duration.



Desk Review

Prior to designing the questionnaire, a focused desk review was undertaken in order to inform the design: the categories of marine activities to include and to assist in determining the best approach to collecting the responses from Irish households. Previous surveys of domestic residents' marine activities conducted by the ESRI in 1996[23] and 2003[24] were particularly useful. A more recent survey by SEMRU of the Irish population's participation in coastal and marine based recreational activities, carried out in 2012, was also reviewed[25]. The 2015 Scottish Marine Recreation and Tourism Survey Report[26] was also consulted and provided further guidance in terms of survey design. The annual reports from FI of general domestic tourism numbers were also used to determine aggregate values. Finally, the companion survey and report to this one, "A survey of marine and coastal overseas tourism activity in Ireland" was carried out prior to the domestic resident survey and provided a basis for the definition of coastal and marine tourism and the specific activities to be included. This allows for direct comparison across both reports in terms of activities and expenditures and also facilitates aggregation to estimate the total demand value of marine and coastal tourism in Ireland, for both domestic and foreign participants.

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

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

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

[26] Marine Scotland (2016). Scottish Marine Recreation and Tourism Survey 2015 Final Report. Marine Scotland Publication, https://www2.gov.scot/Resource/0049/00497904.pdf

The Questionnaire

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

- **Screening:** In this section, data on area of residence, gender, social class and age of participants was collected. These questions allowed the survey company to ensure that certain quotas for key demographic characteristics were met.

- **General tourism and leisure questions:** This section of the survey was aimed at collecting data on coastal day and overnight trip profiles and general spending patterns on day and overnight trips. The duration of trips in coastal areas was also recorded for the overnight trips, together with respondent's awareness of the WAW and its contribution to their trip plans.

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

- **Demographic Background information:** Finally, some other important demographic data on respondents, not collected in the screening section, such as working status, income levels, marital status, etc. were also collected.

The questionnaire was tested using focus groups and further discussions with the survey company, RedC, led to some final refinements of the survey instrument. The final survey instrument used can be downloaded from http://www.nuigalway.ie/media/researchsites/semru/Domestic_Marine_Tourist_Questionnaire.pdf.

Sampling

In total, 1,014 face-to-face household interviews were conducted with Irish residents during the months of February and March 2019. A quota controlled sampling procedure was followed to ensure that the survey was nationally representative for the population aged 18 years and older. The quotas used here were based on known population distribution figures for age, sex, social class and region of residence based on the most up to date CSO projections for 2018.

Interviews were spread across different days of the week and across different times of day to ensure all population sub groups had an equal chance of being interviewed. A total of 81 sampling points were selected nationally from the Electoral Register. Within each of these sampling points approximately 12 households were interviewed (at 4 more densely populated sampling points the number of households sampled were doubled to 24 households). The households chosen to undertake the survey within each sampling point were selected at random.

Weighting and Analysis

As previously outlined, respondents interviewed were required to conform to quota controls to insure representativeness at a national level. In aggregating the participation and expenditure data from the sample to the total population of domestic tourists, aggregate estimates provided by the CSO for total number of domestic tourists in Ireland, (from the "Holiday" or "Visiting friends/relatives" categories of the quarterly Household Travel Survey) was used to weight the sample.

Data was collected using a computer-assisted personal interviewing (CAPI) approach where the interviewer uses an electronic device (tablets) to show the questions and record answers. This also facilitated instant upload to the database. All data was handled in compliance with confidentiality and General Data Protection Regulation (GDPR) regulations. The data was analysed using Microsoft Excel and the statistical software package STATA.

75% of the sample engaged in at least 1 marine activity in 2018

04

Survey findings: Domestic Coastal and Marine Tourism in Ireland

Overview of the Sample

The number of participants in the survey was 1,014. Ten observations were identified as outliers due to extreme values for number of trips taken and/or expenditure and were removed from the sample. The profile of the remaining survey participants is presented in Table 1. The average age of the 1,004 remaining respondents was 46, with the minimum age allowed by the sampling strategy being 18 and the maximum age of participant being interviewed being 89. The gender distribution of the participants was 50% male and 50% female. Fifty five percent of respondents were married and 42% had some form of third level education. Seventeen per cent were retired, 55% were full time employed and 7% were currently students. These figures are in line with Census of Population summary statistics for the Republic of Ireland. The summary statistics for the sample are given in Table 1, below.

Eight hundred and nine individuals in the sample (81%) indicated that they made either a day or overnight trip to a coastal area[27] in Ireland in 2018. Seventy three percent of the sample took at least 1 day trip within the Republic of Ireland for the purpose of marine leisure in 2018, while 43% took at least one overnight trip to a coastal area. In total, 770 individuals undertook marine related leisure activities and 401 of these undertook at least one water-based activity (Water-based activities are a sub set of the marine activities. The activities belonging in both categories are presented in Table 2 below). Individuals in the sample took on average 5 coastal day trips and 1.25 overnight trips in 2018. Participants who indicated that they took an overnight trip in a coastal area stayed, on average, 3.6 nights but this varied within a range of 1 to 15. Forty nine individuals in the sample (5%) took 5 overnight trips or more to coastal areas in Ireland during 2018. The average travelling party size was 2.5 adults and 1.05 children.

It was also observed that 91% of participants were aware of the WAW route and 38% of the entire sample had purposefully spend some time travelling the WAW route in 2018. Those who indicated that they had spent time travelling on the WAW spent an average number of 4.42 days on the route in 2018. A breakdown of the marine activities undertaken by participants in the sample and their expenditure patterns are presented in the following sections.

[27] Respondents were informed that "a coastal area is defined for this study as a coastal city, town, village or rural area adjacent to the sea. A trip could be anything from a weekend break at a coastal town, to a day out at the beach, to a day's walk along a coastal path, etc." It was therefore left up to the respondents themselves to decide for example whether a trip to Cork city was a coastal trip or an urban experience trip.

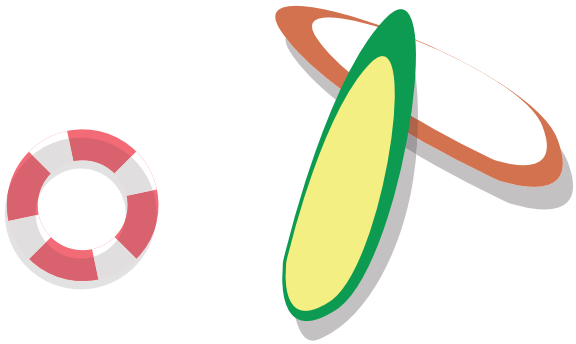
Table 1. Summary Statistics for Sample

	Mean	Std. Dev.	Min	Max
Age	46.27	16.39	18	89
Proportion male	0.50	0.50	0	1
Proportion with third level education	0.42	0.49	0	1
Proportion homemaker	0.07	0.25	0	1
Proportion retired	0.17	0.38	0	1
Proportion students	0.07	0.25	0	1
Proportion full time employed	0.55	0.50	0	1
Proportion homemaker	0.07	0.25	0	1
Proportion married	0.55	0.50	0	1
Number of adults usually in travelling party	2.53	2.10	1	11
Number of children usually in travelling party	1.05	1.28	0	6
Number of coastal day trips	5.07	9.43	0	100
Number of coastal overnight trips	1.34	2.30	0	15
Number of nights spent per overnight trip	3.59	2.60	0	15
% of all overnight trips taken that are to coastal areas	63.55	34.22	0	100
Proportion aware of Wild Atlantic Way	0.91	0.29	0	1
Proportion who purposefully took a trip on Wild Atlantic Way (WAW)	0.38	0.49	0	1
Days spent on WAW if trip taken purposefully on WAW	4.42	6.70	1	100

Marine activities undertaken by the sample

This section presents an overview of the coastal and marine activities that the sample of domestic residents participated in during 2018. All 20 activities used in the survey instrument are listed in Table 2. The activities are also grouped into two higher levels of classification to facilitate mapping of activities by county and to examine differences between those undertaking activities that require direct contact with marine waters and those that do not. The groups of activities contained within these higher level classifications are shown in the final two columns.

Seventy five percent of the sample engaged in at least 1 marine activity in 2018. The rate of participation in marine activities on overnight trips is less at 39%. Respondents on average took part in 2.2 of the marine activities listed in Table 2 during the year. For active participants (taking part in at least 1 activity) the average number of marine activities undertaken was 2.9. This rose to 4.3 marine activities for the 394 respondents who stated that they participated in an activity that involved direct contact with the marine environment (the first category in Grouping 2, Table 2, and henceforth referred to as *water-based activities*). This latter group also undertook on average 1.02 of these water-based activities during the year.



Across the entire sample approximately 40% reported that they had participated in at least one water-based activity during the previous year. This is higher than the 20% figure that FI reported for domestic tourists, but in the FI report "watersports" excludes swimming. In the survey conducted for this study, swimming represents the second most important activity overall and the most important water-based activity[28]. If swimming is excluded then the corresponding participation figure in this survey for the remaining water sports activities is 25% which is close to the FI estimate. Similar to marine activities, the rate of participation in water-based activities for overnight trips is also less at just 24%.

Table 2. Marine activity classification

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

[28] Fáilte Ireland (2019). Key tourism facts 2018, Fáilte Ireland Publication, Dublin https://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3_Research_Insights/Key-Tourism-Facts-2018.pdf?ext=.pdf

The participation numbers in each of the 20 activities are presented in Figure 3. As was the case for overseas tourists, coastal land-based activities rather than water-based activities were more popular amongst domestic residents. *Walking/running along the coast/beach/cliffs/etc*. was the activity most undertaken in the sample (564), followed by swimming (276), followed by *Other trips* to the beach or seaside (242) and *Any other sightseeing trip where the proximity to the sea was a necessity*[29] (148). Cycling along the coast and visiting nature reserves along the coast were also popular activities amongst respondents (139 and 94 participants respectively).

While fewer respondents participated in the majority of the water-based activities, swimming in the sea was the second most popular activity overall. The surfing category (88) and different forms of boating/sailing activities (177)[30] were also relatively popular amongst respondents. Ninety six respondents indicated that they participated in sea angling either from the shore or from a boat with 9 of these indicating they participated in both forms. If one compares the water-based activity participation rates observed here to those from previous studies highlighted in Figure 2, it can be seen that participation rates in activities such as angling from shore, angling from a boat, sailing, whale watching, and diving have remained constant over all studies. Sea swimming would appear to continue to grow in popularity with 27% indicating in the current study that they swam at some point in 2018. Surfing is another activity that would appear to have grown in participation rates across the study years with 9% in the current study indicating they had undertaken this activity in 2018.

The breakdown of participation numbers in each activity by day trip, overnight trip, and both day and overnight trip is shown in Figure A1 in the appendix. It is interesting to note that many of the land based activities, such as cycling and walking along the shore, sea angling from shore trips to the beach or trips for sightseeing, are more likely to be undertaken via day trips while the more specialised water-based activities such as boating, sailing, diving, surfing, whale watching and sea fishing from a boat are most likely to be undertaken via overnight trips. Swimming is the only exception to this general pattern where the majority of participation is via day trips.

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

[30] The 177 figure combines the categories: 1. Sailing in the sea; 2. Boating in the sea in rowing boats, kayaks, canoes, etc. and 3. Boating, cruising in the sea in power-boats, rigid inflatable boats or boats with in-board engine. This is the Boating/Sailing category from Grouping 1 in Table 2.

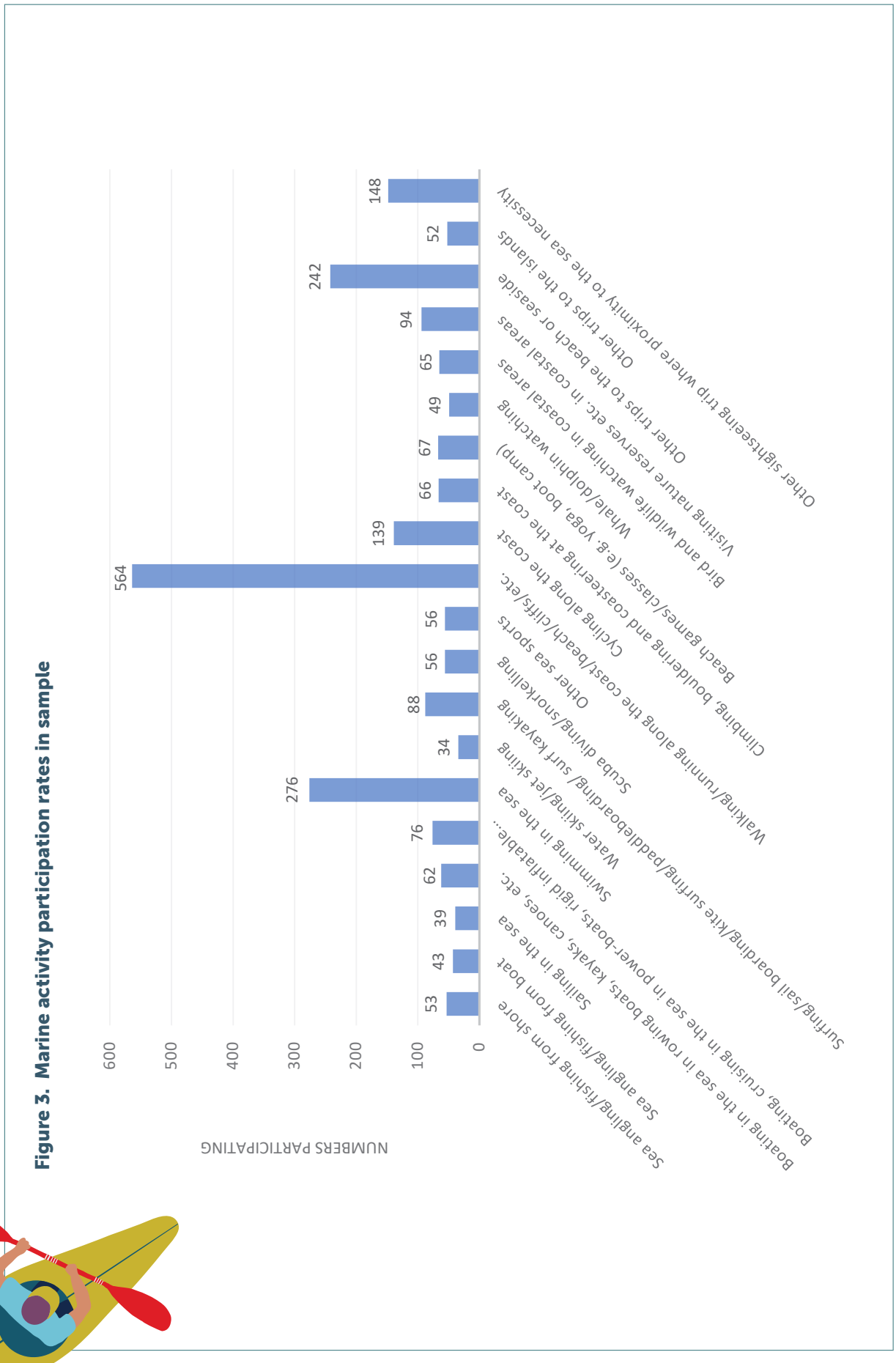
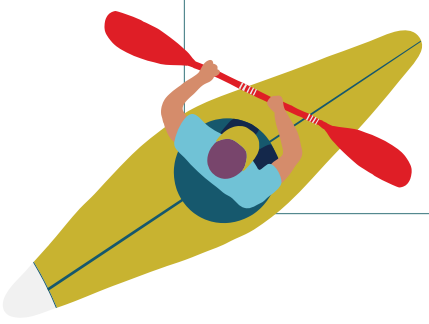


Figure 3. Marine activity participation rates in sample
NUMBERS PARTICIPATING
0
100
200
300
400
500
600
53
43
39
62
76
276
34
88
56
56
564
139
66
67
49
65
94
242
52
148
Sea angling/fishing from shore
Sea angling/fishing from boat
Sailing in the sea
Boating in the sea in rowing boats, kayaks, canoes, etc.
Boating, cruising in the sea in power-boats, rigid inflatable...
Swimming in the sea
Water skiing/jet skiing
Surfing/sail boarding/kite surfing/paddleboarding/ surf kayaking
Scuba diving/snorkelling
Other sea sports
Walking/running along the coast/beach/cliffs/etc.
Cycling along the coast
Climbing, bouldering and coasteering at the coast
Beach games/classes (e.g. yoga, boot camp)
Whale/dolphin watching
Bird and wildlife watching in coastal areas
Visiting nature reserves etc. in coastal areas
Other trips to the beach or seaside
Other trips to the islands
Other sightseeing trip where proximity to the sea necessity



Further details in relation to the number of day and overnight trips for active participants in each activity and the average number of days per overnight trip spent on each activity is shown in Table 3. The highest average number of day trips taken for any activity is for bird and wildlife watching in coastal areas. In this case 42 active participants take on average 7.52 day trips to undertake this activity. This is closely followed by sea angling/fishing from shore (7.19 day trips for 42 individuals) and visiting nature reserves etc. in coastal areas (6.19 day trips for 58 individuals). Visiting nature reserves etc. in coastal areas also sees the highest frequency of overnight trips per year amongst active participants with an average of 4.19 overnight trips taken amongst the 53 individuals undertaking overnight trips for this activity. The high standard deviation associated with this activity for both day and overnight trip frequencies should however be noted. Visits to the islands seems to be an almost one off event for participants with the lowest frequency of any activity for both day and overnight trips (1.94 and 1.05, respectively). While climbing, bouldering and coasteering at the coast sees one of the lowest frequencies of overnight trips, this activity is associated with the highest number of days per overnight trip at 3.13 days (final column in Table 3).

Table 3. Number of Day and Overnight trips per active participant and average number of days spent at activity on overnight trip

	Day Trips		Overnight Trips		Days per overnight trip
	Mean	Std. Dev.	Mean	Std. Dev.	Mean
Sea angling/fishing from shore	7.19	11.98	1.58	1.22	2.74
Sea angling/fishing from boat	3.50	4.85	1.26	0.44	1.45
Sailing in the sea	1.95	1.30	1.35	0.75	1.58
Boating in the sea in rowing boats, kayaks, canoes, etc.	3.10	3.74	1.34	1.29	1.93
Boating, cruising in the sea in power-boats, rigid inflatable boats or boats with in-board engine	2.97	5.96	1.37	1.28	1.90
Swimming in the sea	4.19	5.33	2.13	1.80	2.40
Water skiing/jet skiing	3.07	2.67	1.20	0.52	1.30
Surfing/sail boarding/kite surfing/ paddleboarding/ surf kayaking	2.41	2.86	1.30	0.93	1.82
Scuba diving/snorkelling	2.35	3.99	1.07	0.22	1.23
Other sea sports	2.45	5.26	1.06	0.19	1.18
Walking/running along the coast/beach/ cliffs/etc.	5.22	8.72	2.41	2.31	2.65
Cycling along the coast	3.45	5.79	1.67	1.83	2.73
Climbing, bouldering and coasteering at the coast	3.56	5.23	1.43	1.19	3.13
Beach games/classes (e.g. yoga, boot camp)	3.42	4.01	1.17	0.45	1.37
Whale/dolphin watching	3.00	5.45	1.14	0.56	1.35
Bird and wildlife watching in coastal areas	7.52	30.72	1.23	0.63	1.47
Visiting nature reserves etc. in coastal areas	6.19	26.19	4.19	20.43	2.00
Other trips to the beach or seaside	4.51	8.39	1.80	2.30	1.74
Other trips to the islands	1.94	2.22	1.05	0.22	1.46
Other sightseeing trip where proximity to the sea necessity	2.93	3.76	2.19	3.46	2.09

It is interesting to note that the more specialised the activity is, the more likely it is to have been the main purpose for undertaking the overnight trips. This is a similar finding to the overseas coastal tourism report where the more specialised the activity was, the more likely it was to have been the main purpose for undertaking the trip to Ireland. It can be seen from Figure 4 that activities such as sailing, boating in powered and unpowered crafts, sea-angling from a boat, board sports and water/jet-skiing were the main purpose of the trip for approximately 75-80% of the participants in each case. Land-based coastal activities are more likely or just as likely to be "an important part of the trip" for the domestic tourist. Bird and wildlife watching in coastal areas appear to be activities that respondents participate in on a secondary basis, with approximately 40% of those undertaking these two activities indicating that they were 'just incidental' to their overnight trips.

Figure 4. Importance of marine activity in terms of the overnight trip taken* (%)

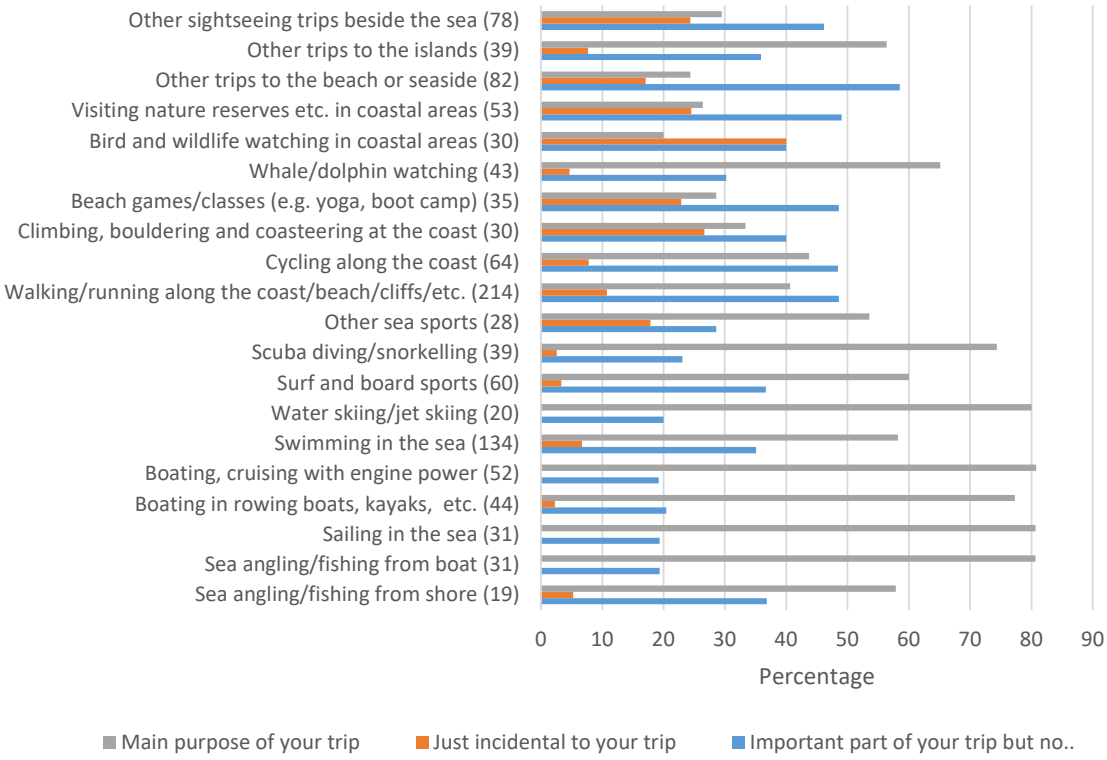
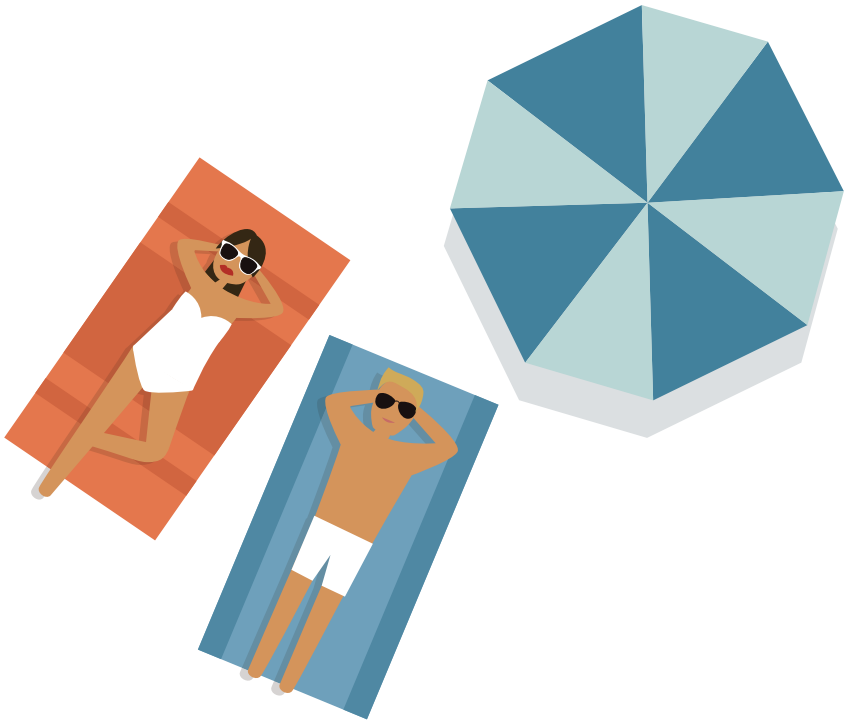


*Figure in brackets is the number of participants who undertook the activity during an overnight trip

An important objective of the study was to discover where along the Irish coast domestic tourists undertook their marine activities. Accordingly, following the question on activity participation, respondents who had undertaken the activities on overnight trips, were then asked to indicate in what counties the activities had taken place. As shown in Figure 5, the results indicate that domestic tourists undertake the majority of their marine activities on the West and South coasts of Ireland. The size of the circles in each case show the county's share in total participation numbers. Unlike the overseas tourism market, where the majority of the activity was found to have been in the southern half of the western sea board, the distribution of marine activities along the West and Southern coasts is much more evenly spread out for the domestic tourism market.

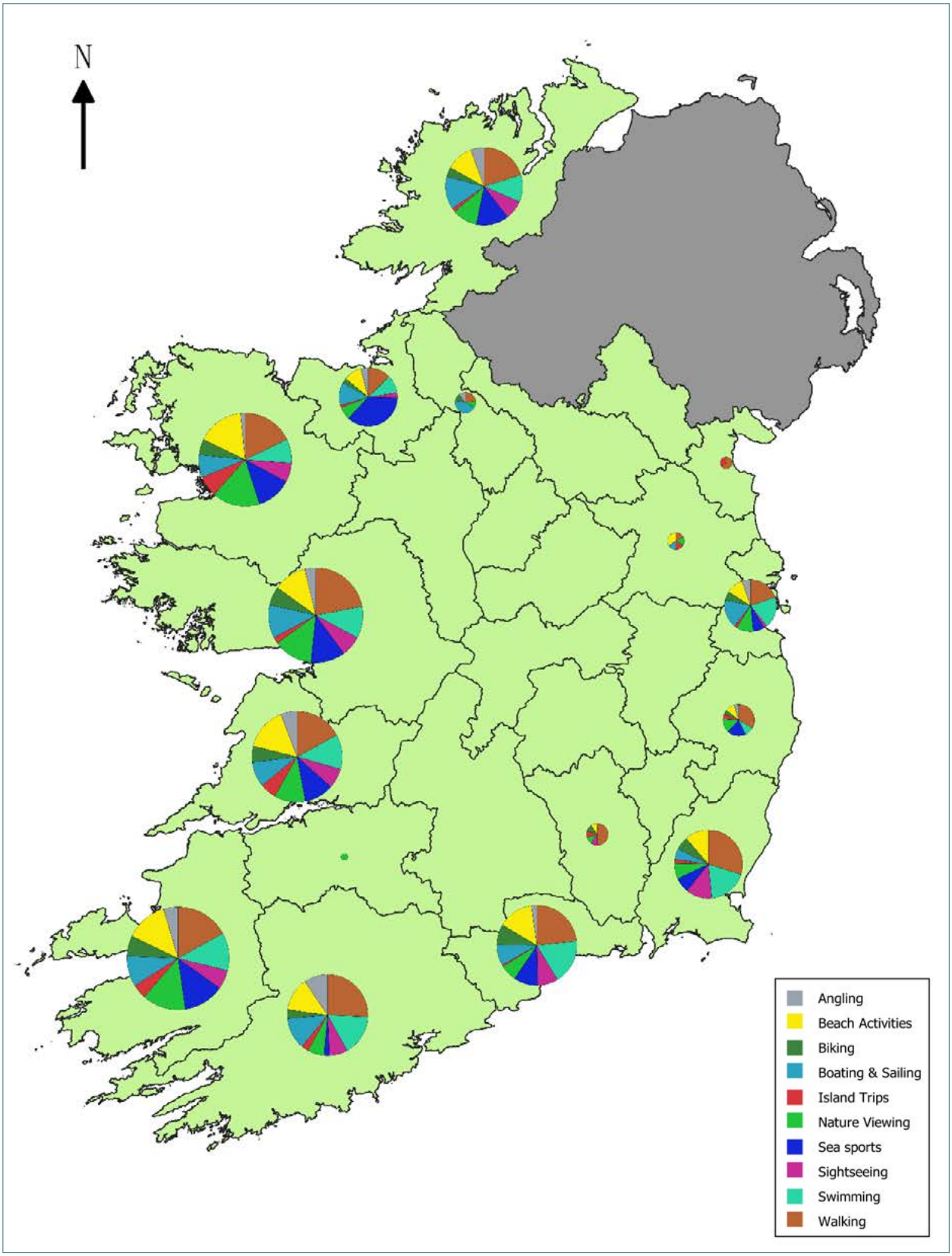
Similar to the overseas tourism study, Galway, Kerry, and Clare were the leading counties, in that order, for participation in marine tourism activities. In the domestic tourism case however, a substantial share of total marine activity is also taking place in Mayo, Waterford and Donegal. Counties Louth and Limerick see the lowest participation rates in marine activities across the sample.

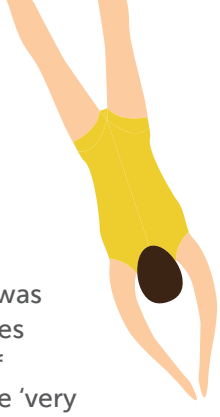
County performance figures for general domestic tourism from FI would suggest that Dublin is the most visited coastal county in Ireland, followed by Cork, Galway, Kerry, Mayo and Clare[31]. Figures here would suggest that counties such as Clare, Waterford and Donegal rank much higher for domestic coastal and marine related tourism than for general domestic tourism. This is probably a reflection of the quality of the seascapes and marine amenities in these counties and road access along the coastal margin. A more detailed breakdown of respondent numbers participating in marine activity at the county level can be found in Table A3 in the Appendix.



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

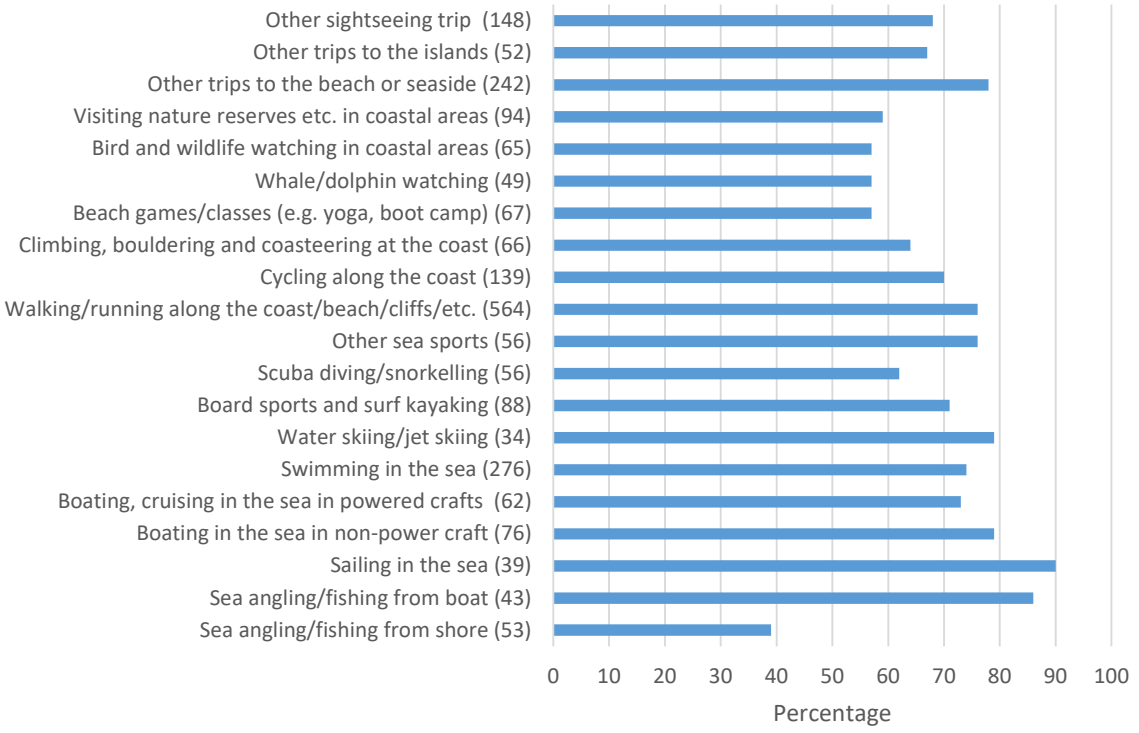
Figure 5. Domestic marine related activities at county level

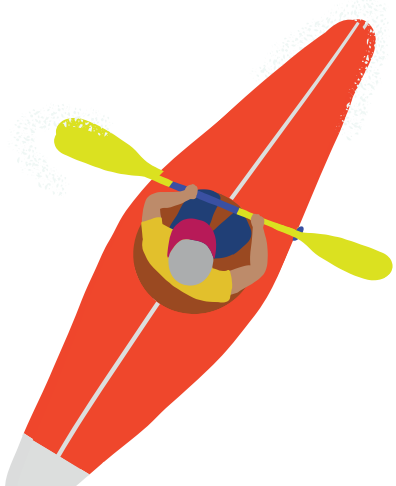




Satisfaction levels with the facilities associated with the marine activities in Ireland were also analysed. This question was asked of all active participants regardless of whether the activity was undertaken on day or overnight trips. As illustrated in Figure 6, overall satisfaction with facilities for the various activities was high (10 activities had a 'very satisfied' rating from at least 70% of participants, while only one activity had less than 50% of participants indicating that they were 'very satisfied' (sea angling from shore)). The highest levels of overall satisfaction with facilities were recorded for sailing and sea-angling from a boat although it should be noted that the numbers in the sample involved in these two activities are the second and third lowest of any of the activities recorded. The dominant activity category of 'Walking/running along the coast/beach/cliffs/etc. also achieves a 'very satisfied' rating of 76% amongst respondents active in this category.

Figure 6. Percentage of participants who were 'very satisfied' with the facilities for the marine activities in Ireland



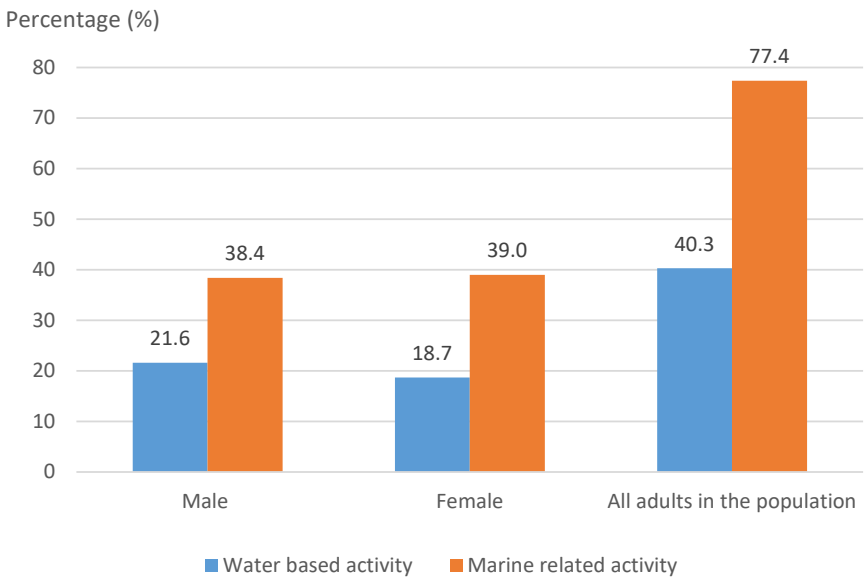


Demographic Profile of Participants

This section analyses participation in the marine related activities generally, and the water-based activities by Irish residents across a range of socio-demographic characteristics: gender, age, education, social class and presence of children in the household.

As shown in Figure 7, 77% of the sample reported having participated in at least one of the 20 marine related activities from Table 2. As was observed in previous national surveys of marine and water-based activities in Ireland[32], participation levels across the sexes is almost equally balanced. Participation in the water-based activities is lower at 21.6% for males and 18.7% for females (as a % of the total sample, both male and female) compared to the more general marine related activities category where the participation rates are 38% and 39% for males and females respectively.

Figure 7. Percentage of respondents participating in marine and water-based activity by gender



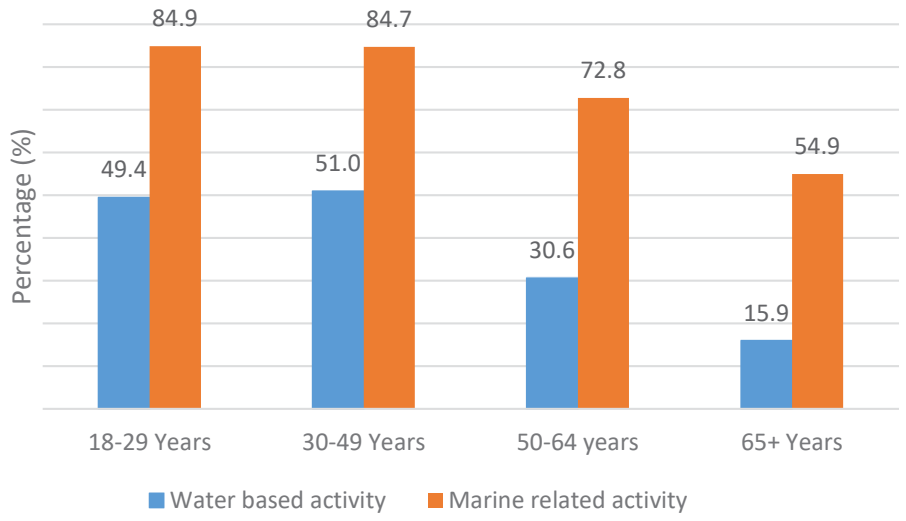
In general, it can be seen from Figure 8 that participation in marine related and water-based activities declines with increasing age. However, participation in any marine related activity is still above 50% across all age brackets. Participation in any water-based activity is lower and declines faster with age than the general marine related activities category. Participation in any water-based activity is approximately 50% for those aged in the 18 to 29 and 30 to 49 age brackets. Beyond that participation declines to 31% for those aged 50 to 64 and to just 16% for those aged over 65. The more sharply declining activity rates for the water-based activities most likely reflect the fact that they represent the more physically demanding pursuits.

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

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

Across the sample an average of 2.26 marine related activities were participated in per person during the year 2018. This ranged from 0 to 18 across the sample. For those actively participating the average rises to 4.27 marine related pursuits engaged in per person per year. Respondents took part in less than one (0.89) water-based activity on average over the year. This ranged from 0 to 11 across the sample. For those actively participating in any water-based activity, the average number of water-based pursuits rises to 2.23 marine related pursuits engaged in per person per year. There was no statistical difference in the number of activities undertaken in any category across the genders.

Figure 8. Percentage of respondents participating in any marine and water-based activity by age category

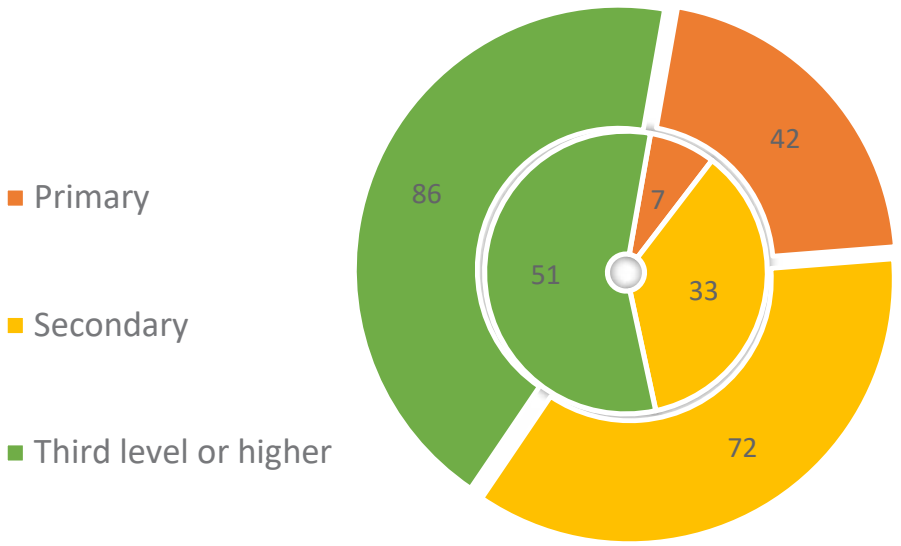


To ascertain if there are statistical differences between groupings t-tests were undertaken. Results from the tests suggest that the differences in means of percentages of respondents participating in marine related and water-based tourism activities are statistically significant within each age category[33]. Tests also indicated that the percentage means of marine related activities are not statistically different across the age brackets of 18-29 and 30-49 years. However, the percentage means of marine related activities are statistically different between the age groups 18-29 and 50-64 years. The percentage means of marine related activities also differ between the groups 18-29 years and 65+ years. The percentage means of water-based activities also differ across the age groups 30-49 and 50-64 years, 30-49 and 65+ years, and 50-64 and 65+ years.

It is also evident that participation in marine related and water-based activities increases with higher levels of education completion (Figure 9). Only 7% of those with primary level education participate in water-based activities although this rises to 42% for marine based activities. The equivalent figures for those with third level education are 51% and 86% for water-based and marine related categories of activities, respectively. Results from t-tests suggest that the difference in means of percentages of respondents participating in water-based tourism activities is statistically significant across the education categories. The difference in means of percentages of respondents participating in marine related tourism activities is also statistically significant. Interestingly, there was no statistical difference found in terms of percentage participating in marine related or water-based activities amongst those who are currently third level students and those that are not.

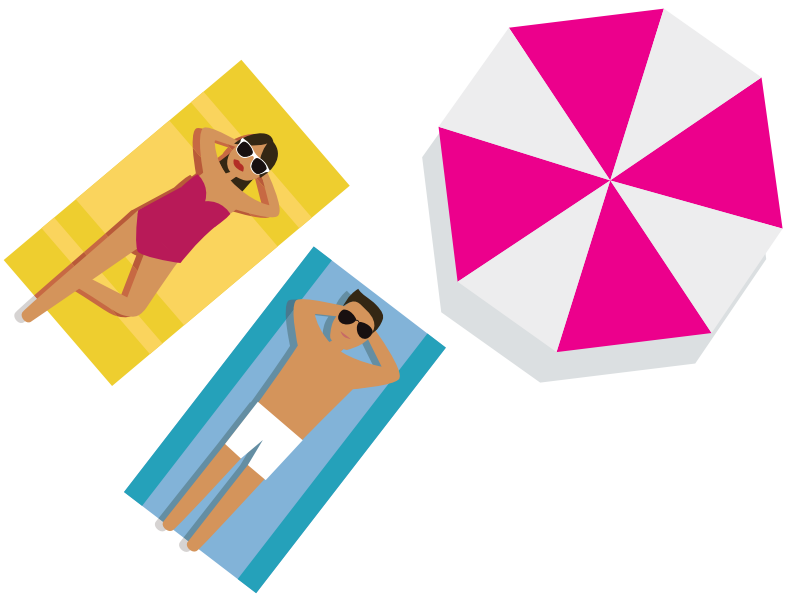
[33] Statistical significance is tested for throughout this section at the 5% level unless otherwise stated.

Figure 9. Percentage of respondents participating in water-based and marine related activities by type of education



Inner circle: Water-based activity participation
Outer circle: Marine related activity participation

Those with higher levels of education attainment are also likely to participate in a higher number of different marine related and water-based activities as shown in Figure 10. Results from t-tests also suggest that the difference in percentage means of the number (intensity) of water-based tourism activities undertaken by the respondents is statistically significant across the education categories. It should be noted however that education level attainment is generally closely linked with age. In the sample the proportion of persons who have left education at the lower levels is higher amongst older age brackets. Once the age bracket is controlled for, education has a statistically significant (and positive) influence on the probability of participation in marine related activities for those with a third level qualification. It is insignificant for those with lower levels of education attainment.



Respondents from households with children are more likely to participate in **water-based activities**

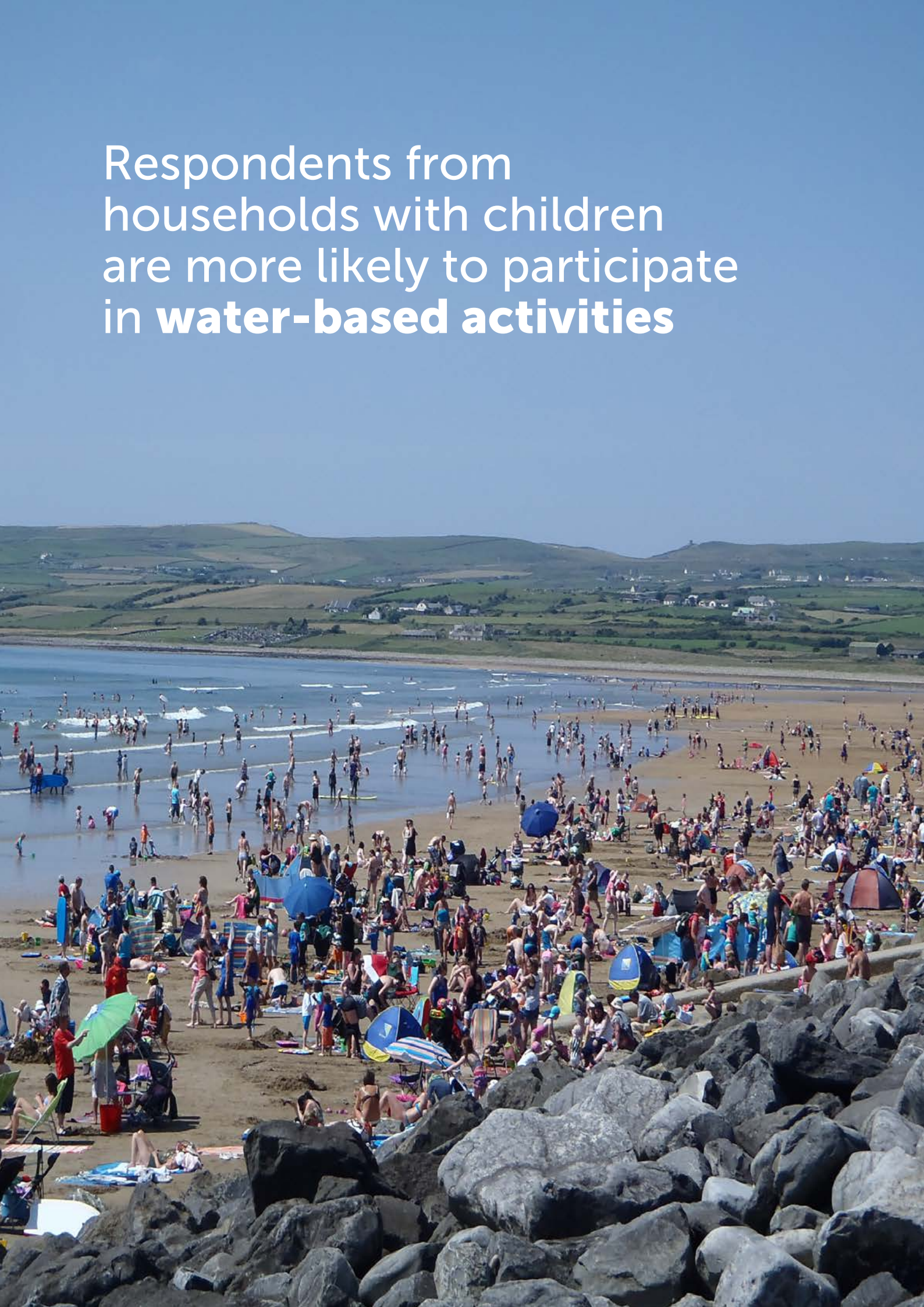
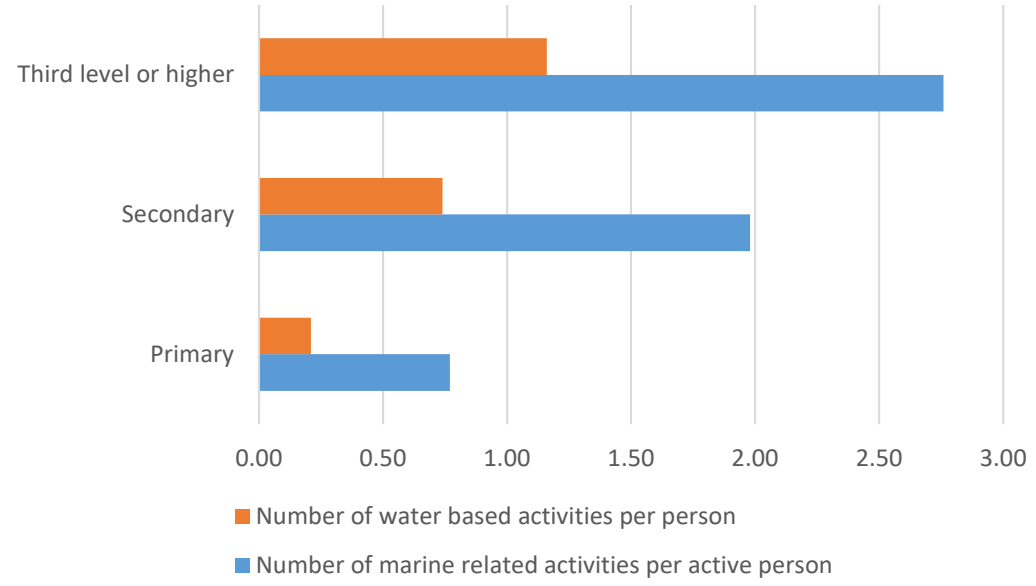
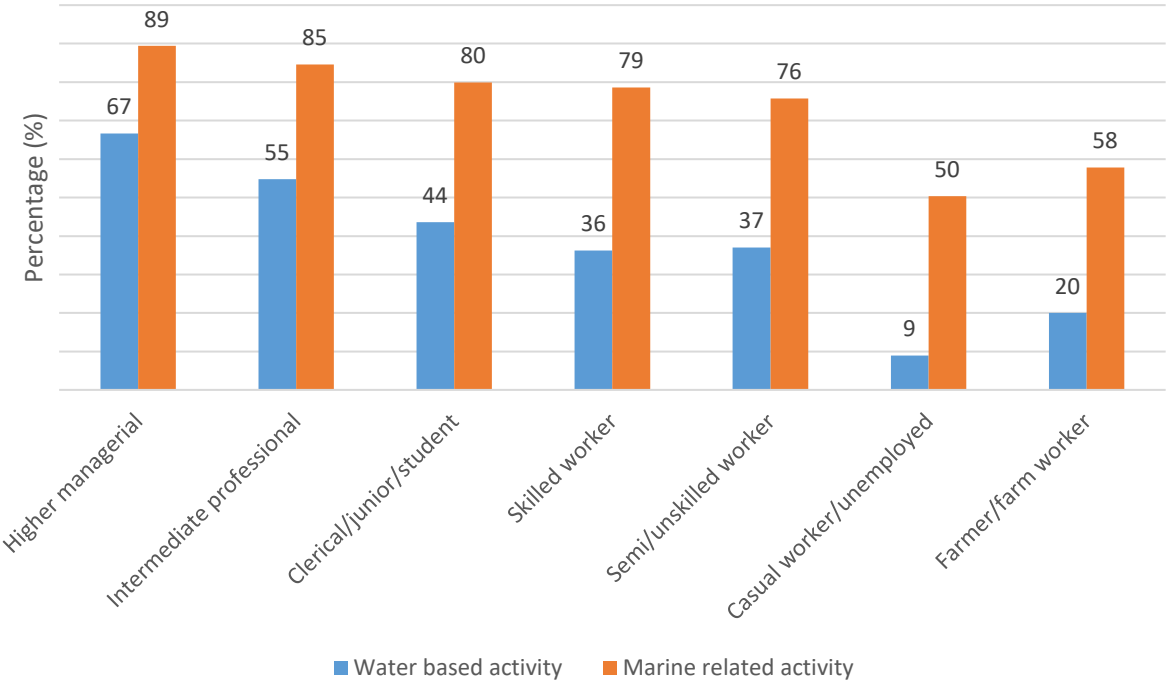


Figure 10. Number of different marine related and water-based activities undertaken per person per year, classified by education level



There is also variation in participation rates across the social classes. The social classes are defined by an individual's type of occupation. As shown in Figure 11, higher managerial roles or professional occupations have the highest levels of marine related and water-based participation. In contrast, casual worker/unemployed or farmer/farm worker class have the lowest levels of participation. By conducting a t-test it was found that the difference in means of percentages of respondents participating in marine related and water-based tourism activities is statistically significant within each social class. There are also a number of statistically significant differences in means of percentages of respondents participating in marine related and water-based tourism activities across the social classes. These are broken down in Tables A1 and A2 in the appendix.

Figure 11. Percentage of respondents participating in marine and water-based tourism activities by social class



As shown in Figure 12, respondents from households with children were found to be more likely to participate in water-based activities, than those from households with adults only. Fifty six percent of respondents from two children households participate in water-based activities compared to just 34% from households with adults only. This falls to 42% and 39% for respondents from three or more children households, and one child households, respectively. Once again tests of significance indicate that the difference in means of percentages of respondents participating in marine related and water-based tourism activities is statistically significant within each group according to the presence and number of children in the household.

The means of percentages of respondents participating in marine related activities do not statistically differ across household groups based on the number of children. However the means of percentages of respondents participating in water-based activities differ between households with no children and households with two children. The same holds for differences between households with one child and households with two children. Furthermore, the means of percentages of respondents participating in water-based activities differ between households with two children and households with three or more children.

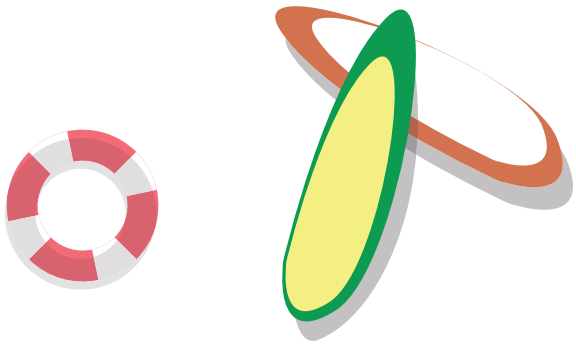
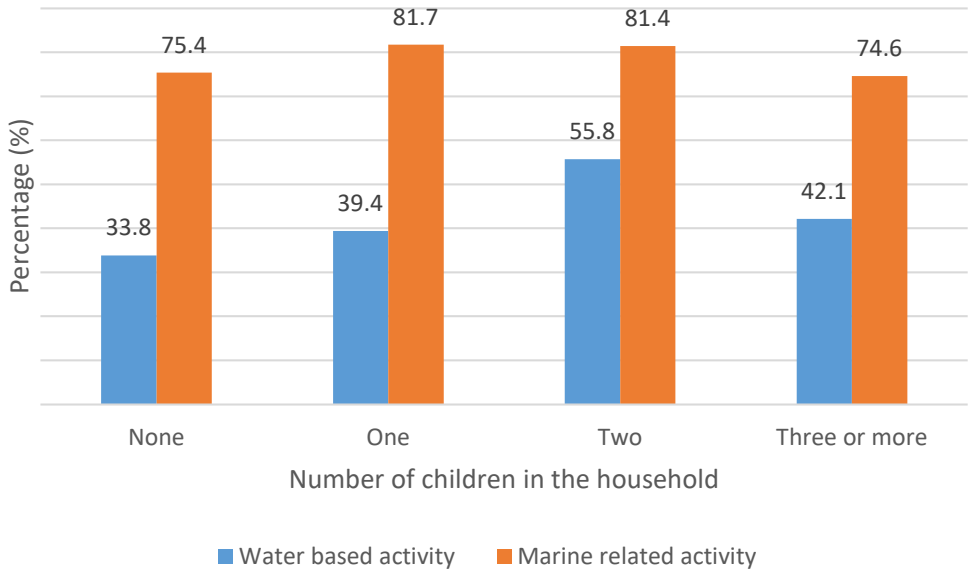


Figure 12. Percentage of respondents participating in marine and water-based tourism activities classified by the presence of children



Expenditure Profile

Average marine and coastal tourism and leisure expenditure

Expenditure data on domestic day and overnight trips was collected in the survey and tabulated (Table 4). A flowchart of the expenditure calculations for this section is also provided in Appendix A4. The average total expenditure per coastal day trip in the sample was €106.45. Eating out/socialising makes up the largest proportion, 39%, of the total average expenditure per coastal day trip. Coastal day trippers also spend a significant proportion of their budget on fuel in getting to and from their chosen destinations (24%), and on food and groceries (10%).

The average expenditure per coastal overnight trip (overnight trips lasted on average 3.6 nights) was €593.74. Given each overnight trip involved 2.5 adults on average, expenditure per person per coastal night trip is estimated to be €237.20. Accommodation makes up the largest proportion, 47%, of the total average expenditure per coastal overnight trip. Similar to the coastal day trippers, those taking overnight coastal trips also spend a relatively large proportion of their budget on eating out/socialising (23%) and on fuel (10%). The proportional expenditure on the different items for the average overnight coastal trip is presented in Figure 13. Respondents were next asked for an estimate of the % of their recorded average day and overnight trip expenditure that was on marine related activities in the coastal areas[34]. For those who had taken day and overnight trips the average was 33% and 34% respectively.

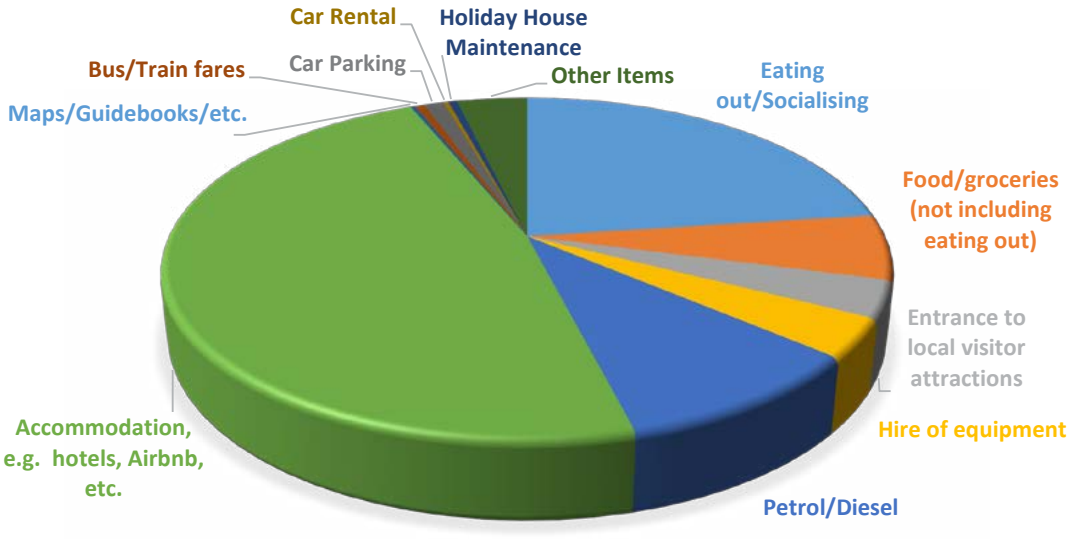
[34] At this point in the survey respondents were given the definition of marine related activity, i.e. Marine related activities refers to sea-based activities such as *swimming, surfing, boating, yachting, cruising, sea kayaking, diving and other nautical sports as well as land-based activities including, beach activities, sun bathing, marine related sight-seeing and other coastal recreation activities taking place on the coast for which the proximity to the sea is a necessity.* The list of marine related activities was then presented to respondents along with all the question asked relevant to participation rates, as reported on in the previous section. Individual activity expenditure estimates were also recorded.

Table 4. Estimated expenditure per day and per overnight trip in coastal areas on accommodation, meals, travel and other items.

Expenditure item (€ per person)	Coastal Day Trip (726 observations)	Coastal Overnight Trip* (431 observations)
	Mean (Std. Dev.)	Mean (Std. Dev.)
Eating out/Socialising	41.85 (43.10)	138.37 (130.93)
Food/groceries, i.e. self-catering, snacks, etc. (not including eating out)	10.42 (30.23)	37.28 (75.33)
Entrance to local visitor attractions	8.99 (15.77)	21.21 (40.04)
Hire of equipment, e.g. tents, sports equipment, etc.	7.08 (17.61)	22.33 (52.58)
Petrol/Diesel	25.74 (25.60)	60.24 (62.49)
Accommodation, e.g. hotels, Airbnb, etc.	-	278.93 (292)
Maps/Guidebooks/Leaflets	0.54 (3.19)	1.45 (5.01)
Bus/Train fares	1.68 (6.67)	3.19 (13.29)
Car Parking	2.52 (4.90)	4.08 (8.54)
Car rental	0.44 (5.51)	1.65 (24.06)
Holiday House Maintenance	0.12 (1.83)	2.76 (19.87)
Other items	7.06 (12.65)	22.21 (42.87)
Total expenditure per trip and travelling party	106.45 (92.52)	593.73 (478)

* The average coastal overnight trip lasts 3.6 nights and the average number of overnight trips taken per annum was 1.25 across the entire sample, rising to 2.9 trips for those who actually take coastal overnight trips.

Figure 13. Expenditure distribution by category of domestic tourists (overnight trips)



Respondents who indicated that they were participating in any of the 20 designated activities in the survey instrument were asked how much they personally spent in total on each of those separate activities during the year 2018 (across all day and overnight trips). Respondents were asked to consider expenditure on equipment for these activities and other trip related expenditure separately. Average expenditure per annum per person per activity and average equipment expenditure per annum per person per activity is shown in Tables 5 and 6, respectively.

The average, non-equipment related expenditure (Table 5) on any of the boating related activities and sea angling activities are significantly higher on average than for the other activities. As discussed previously these activities are also often the main purpose of the trips taken which suggest that participation in these activities are, by and large, responsible for the resulting direct and indirect economic impacts of the coastal trips taken. At the other end of the scale the generic categories of beach games, and other sea sports would appear to be the least costly marine activities undertaken. Swimming also has low associated annual expenditure (€13.66).

Table 5. Average Expenditure per Annum per Person per Activity (excluding equipment)

€ per person per annum	Obs.	Mean (€)	Std. Dev. (€)
Sea angling/fishing from shore	53	90.89	180.04
Sea angling/fishing from boat	43	70.05	96.57
Sailing in the sea	39	46.82	78.30
Boating in the sea in rowing boats, kayaks, canoes, etc.	76	39.03	71.23
Boating, cruising in the sea in power-boats, rigid inflatable boats or boats with in-board engine	62	106.94	243.40
Swimming in the sea	276	13.66	58.52
Water skiing/jet skiing	34	23.50	26.34
Surfing/sail boarding/kite surfing/ paddleboarding/ surf kayaking	88	42.93	67.22
Scuba diving/snorkelling	56	60.41	45.42
Other sea sports	56	8.39	30.91
Walking/running along the coast/beach/cliffs/ etc.	564	28.69	114.93
Cycling along the coast	139	30.11	84.56
Climbing, bouldering and coasteering at the coast	66	15.21	42.79
Beach games/classes (e.g. yoga, boot camp)	67	14.63	30.80
Whale/dolphin watching	49	54.20	156.06
Bird and wildlife watching in coastal areas	65	20.77	59.32
Visiting nature reserves etc. in coastal areas	94	28.88	39.39
Other trips to the beach or seaside	242	57.63	96.87
Other trips to the islands	52	58.12	86.43
Other sightseeing trip where proximity to the sea necessity	148	35.66	77.21

The average annual expenditure on equipment (Table 6) used in the various activities is highest in relation to some of the water sports activities. These tend to require more specialised equipment. The highest equipment costs are associated with sea-angling, sailing/boating, surfing and water skiing/jet skiing. The two activities associated with the highest participation rates, walking/running along the coast/beach/cliffs/etc. and swimming in the sea are also associated with the lowest per capita equipment expenditures, €4.02 and €3.14 respectively.

Table 6. Average Equipment Expenditure per Annum per Person per Activity

€ per person per annum	Obs.	Mean (€)	Std. Dev. (€)
Sea angling/fishing from shore	53	62.92	112.64
Sea angling/fishing from boat	43	65.81	61.15
Sailing in the sea	39	58.59	73.27
Boating in the sea in rowing boats, kayaks, canoes, etc.	62	62.60	82.27
Boating, cruising in the sea in power-boats, rigid inflatable boats or boats with in-board engine	76	53.70	65.85
Swimming in the sea	276	3.14	9.92
Water skiing/jet skiing	34	37.65	39.08
Surfing/sail boarding/kite surfing/ paddleboarding/ surf kayaking	88	43.93	71.38
Scuba diving/snorkelling	56	33.29	23.15
Other sea sports	56	8.41	25.37
Walking/running along the coast/beach/cliffs/ etc.	564	4.02	16.85
Cycling along the coast	139	20.01	33.37
Climbing, bouldering and coasteering at the coast	66	7.83	34.72
Beach games/classes (e.g. yoga, boot camp)	67	4.81	11.91
Whale/dolphin watching	49	12.67	27.83
Bird and wildlife watching in coastal areas	65	14.54	40.64
Visiting nature reserves etc. in coastal areas	94	12.57	21.51
Other trips to the beach or seaside	242	15.75	32.51
Other trips to the islands	52	27.92	46.26
Other sightseeing trip where proximity to the sea necessity	148	6.84	20.83

Table 7 presents the breakdown of per trip and annual expenditure for different categories within the sample. The average expenditure per person per coastal day trip across the entire sample (including those that did not undertake a trip) was calculated at €77. The equivalent for coastal overnight trips was €252. This rises to €95 and €310 respectively, for those 809 individuals who actually undertook a day or overnight coastal trip during the year (Coastal trip maker in Table 8). Those 770 individuals in the sample who actively engaged in marine activities during their coastal day or overnight trips have a similar spend per trip to the general coastal visitor. This is to be expected given the significant overlap of individuals in these two categories.

The marine activity active visitors do however have a statistically significant higher coastal spend per person compared to the average person across the entire sample. They also have a higher coastal and water-based spend per trip than the sample average. The average coastal expenditure for water-based activity active person group is even higher at €118 per person per day trip and €449 per person per overnight trip. The 401 individuals who indicated that they were participating in water activities also display a statistically significant higher marine activity expenditure per trip and annual coastal tourism expenditure, than any of the other groupings.

Table 7. Average Expenditure by Category of Individual

	Full Sample	Coastal Trip Maker*	Marine Activity Active**	Water-based Activity Active^
Number in Sample	1,004	809	770	401
Average total expenditure per coastal day trip (€)	77	95	94	118
Average total expenditure per coastal night trip (€)	252	310	316	449
Estimated marine activity expenditure per person per trip (€)	116	140	152	210
Estimated on water activity expenditure per person per trip (€)	56	68	73	142

* A coastal trip maker is someone who actually undertook a day or overnight coastal trip during the year.

** Marine activity active individuals refers to those in the sample who actively engaged in marine based activities during their coastal day or overnight trips

^ Water-based activity active individuals refers to those in the sample who actively engaged in activities that involve direct contact with the water during their coastal day or overnight trips

Average marine and coastal tourism and leisure expenditure

As shown in Table 8, the estimated total national expenditure on equipment, day trips and overnight trips[35] across all marine activities is €449 million, of which €144 million relates to equipment and €304 million relates to associated day and overnight trip expenditure. The highest proportions of total expenditure are attributed to 'walking/running along the coast/beach/cliffs/etc.' (14.97%) and the generic 'other trips to the beach or seaside' (14.41%). Boating, cruising in the sea in power-boats, rigid inflatable boats or boats with in-board engine accounts for just under 10% of total national marine activity expenditure.

When combined with the non-power boating category and sailing category it can be seen that boating generally accounts for 18.35% of national marine related activity expenditure. The two types of sea angling account for 11.35% of the total activity expenditure. The high proportional share for boating and sea angling is being driven by the higher per person expenditure patterns associated with these activities. In contrast it is high participation rates rather than per person expenditure that is driving the higher aggregated proportions associated with 'walking/running along the coast/beach/cliffs/etc.' and 'other trips to the beach or seaside'. Climbing, bouldering and coasteering at the coast has the lowest proportional share of total expenditure at just over 1%.

The estimated total national expenditure on equipment, day trips and overnight trips of €449 million

[35] These figures are calculated by multiplying the per person estimates in Tables 5 and 6, by the proportion of the sample involved in each activity, by the population of adults in the country aged 18 plus.

is very similar in magnitude to the combined total expenditure on equipment and supplies, day trips and overnight trips of €433.6 million reported for domestic residents in 2003 by the ESRI (2004)[36]. Adjusting to take account of consumer price inflation (CPI) over the period suggests that there was a slight decrease, in real terms, in the amount being spend by domestic residents on marine activities in Ireland.

Table 8. Estimated total national expenditure per activity (includes day and night trips)

	Equipment (€m)	Expenditure (excl. equipment) (€m)	Total (€m)
Sea angling/fishing from shore	12.15	17.55	29.71
Sea angling/fishing from boat	10.31	10.98	21.29
Sailing in the sea	8.33	6.65	14.98
Boating in the sea in rowing boats, kayaks, canoes, etc.	14.14	8.82	22.96
Boating, cruising in the sea in power-boats, rigid inflatable boats or boats with in-board engine	14.87	29.62	44.49
Swimming in the sea	3.16	13.74	16.90
Water skiing/jet skiing	4.66	2.91	7.58
Surfing/sail boarding/kite surfing/ paddleboarding/ surf kayaking	14.09	13.77	27.86
Scuba diving/snorkelling	6.79	12.33	19.12
Other sea sports	1.72	1.71	3.43
Walking/running along the coast/beach/cliffs/ etc.	8.27	58.96	67.23
Cycling along the coast	10.13	15.25	25.38
Climbing, bouldering and coasteering at the coast	1.88	3.18	5.06
Beach games/classes (e.g. yoga, boot camp)	1.17	3.57	4.74
Whale/dolphin watching	2.26	9.68	11.94
Bird and wildlife watching in coastal areas	3.44	4.92	8.36
Visiting nature reserves etc. in coastal areas	4.31	9.89	14.20
Other trips to the beach or seaside	13.89	50.82	64.71
Other trips to the islands	5.29	11.01	16.30
Other sightseeing trip where proximity to the sea necessity	3.69	19.23	22.92
Total	144.57	304.60	449.17

[36] ESRI (2004). A National Survey of Water-based Leisure Activities in Ireland in 2003. ESRI Report, Dublin.[Available online: https://www.esri.ie/pubs/BKMNEXT62.pdf]

Finally, in this section we generate aggregate estimates of total coastal, marine and water-based tourism expenditures for domestic residents (Table 9). Given a tourist is defined as a visitor whose trip includes an overnight stay, a focus on domestic tourism expenditure requires just examining those individuals taking overnight trips. Total expenditure on an estimated 9,082,000 domestic coastal tourism trips by holiday makers or those visiting friend/relatives in 2018 amounted to €1.585 billion according to the latest CSO HTS results[37]. The CSO HTS trip figures also includes trips taken by individuals aged 0-19 (approximately 26% of the total)[38]. Adjusting for this fact and taking into account that the observed rate of participation in the sample in coastal overnight trips was 43% (431 out of 1,004), total domestic tourism trips taken by adults to the coast in 2018 is estimated to have been 2,943,333. Based on this figure and the average total expenditure per person per coastal night trip (€237.20), €698 million is estimated to be the total expenditure in coastal areas by domestic residents on overnight stays, i.e. *domestic tourism in coastal areas.* This may still be an underestimate of the true total domestic tourism in coastal areas given it was left up to the individuals themselves to decide if there trips were to coastal areas. As observed in SEMRU's overseas tourism report the domestic respondents may not recognise some of their urban experiences, for example a weekend city break to Dublin or Cork, as a coastal trip.

As shown in Table 8, the estimated total national expenditure on marine activities was €449 million. The overnight expenditure share of this total, or what might truly be referred to as domestic marine tourism, is estimated to be worth €381 million[39]. Marine tourism therefore makes up an estimated 19% of total domestic tourism expenditure (using the broader FI measure for domestic tourism equating to €2,006 million in total revenue). It is estimated that €172 million of this was spend by domestic tourists on the water-based activities listed in Table 2.

Table 9. Estimated Aggregate Expenditure of Domestic Tourists by Category*

	Estimated totals
Total domestic overnight trips to coast for holiday trips or visiting friends/ family	3,905,260
Estimated total tourism expenditure in coastal areas (€m)	698
Estimated total marine tourism expenditure (€m)	381
Estimated total water activity expenditure by domestic tourists (€m)	172

*based on results of CSO Household Travel Survey estimates for 2018. As per FI definition tourist means at least one night spend away from home.

[37] CSO (2019). Household Travel Survey CSO statistical release, 19th June, CSO Publication, Cork

[38] https://statbank.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=HTA02&PLanguage=0

[39] In order to work out the share of overnight expenditure in the total (which was needed to calculate the marine activity tourism and water activity tourism aggregate figures) the ratio of overnight coastal expenditure to coastal day trip expenditure from Table 4 was used.

05
Conclusions

This report presents estimates of the value of coastal and marine domestic tourism and leisure activities, based on information provided by households in face to face interviews conducted in February and March 2019. The results highlight the important contribution that Ireland's marine and coastal resources make to the leisure experiences of the general population and the importance of the domestic tourism market to local coastal economies. The analysis indicates that domestic coastal tourism expenditure was approximately €698 million in 2018, while domestic marine tourism generated €381 million. Activities such as walking/running along the coast, swimming and beach visitations are among the most popular activities for domestic visitors on both day and overnight trips. While participation rates in pursuits such as bird and wildlife watching in coastal areas and visiting nature reserves, etc. in coastal areas were lower, these activities did see the highest frequency of both day and overnight trips for those active in these activities. Satisfaction with the available marine related leisure facilities was also found to be very high across all activities.

A number of issues affecting overseas marine tourism development were pointed out by SEMRU (2019)[40]. Many of these issues are also relevant for the development of the domestic marine tourism market. These included limited access to the coastline and marine environment; lack of adequate pier/harbour facilities for recreationalists; uncertainty with insurance cover for marine leisure activity operators in terms of availability and being accessible at a reasonable price for existing, as well as potentially new marine leisure operators; increased pressures on the marine environment that increased marine active tourist numbers could bring. The overseas marine tourism report also pointed to the fact that a complex marine planning process has also acted as a barrier to marine tourism developments in the past but with a draft National Marine Planning Framework now in place this situation is improving[41].

A number of other policy issues unique to the domestic tourism and leisure market are also evident based on the results of this report. A growing body of research has pointed out that people receive many benefits by interacting with high-quality marine environments, which can lead to improvements in their mental and physical health and well-being, particularly of socio-economically deprived individuals[42]. The results here suggest that individuals with higher managerial roles or professional occupations have the highest levels of marine related and water-based participation, while those in the social class casual worker/unemployed or farmer/farm worker have the lowest levels of participation. The latter class are thus losing out on the benefits to be gained by participation in these activities. It was also evident that participation in marine related and water-based activities increased with higher levels of education completion.

This is not a unique finding with Britton (2019)[43] pointing out that social norms and class is often found to persist around water-sport activities and can leave some people from lower-income backgrounds feeling socially and culturally excluded. The higher equipment costs observed for a number of the more specialised marine related activities will also act as a barrier to participation

[40] Hynes, S., Aymelek, M., Corless, R. and Evers, N. (2019). A Survey of Marine and Coastal Overseas Tourism Activity in Ireland, SEMRU Report Series, http://www.nuigalway.ie/media/researchsites/semru/files/SEMRU-Overseas-Marine-Tourism-Report-Final1.pdf

[41] DHPLG (2019). Marine Planning Policy Statement, Government of Ireland Publication, Dublin.

[42] Fleming, L., Maycock, B., White M., Depledge, M. (2019). Fostering human health through ocean sustainability in the 21st century. People and Nature; 1-8, doi:10.1002/pan3.10038.

[43] Britton, E. (2019). Blue Care: The healing power and potential of the deep blue sea. https://www.thejournal.ie/readme/blue-care-the-healing-power-and-potential-of-the-deep-blue-sea-4589768-Apr2019/

for lower income households. Ensuring that all classes of society have the opportunity to access the well-being benefit inducing marine related activities is therefore a worthy policy objective. The current plan to develop a white water centre in the Dublin Docklands could facilitate the introduction of communities from less well-off parts of the city to the well-being benefits of moving water in familiar (and local) surroundings, if proper policies are put in place to ensure that time on site and proper training is made available to such groups. Such interventions have been shown to result in significant long term positive effects on psycho-social wellbeing for these often vulnerable groups in society (Britton et al., 2018)[44].

The spatial pattern observed for domestic resident participation in marine related activities is also interesting from a marine spatial planning perspective. Unlike the overseas tourism market, where the majority of the activity was found to have been in the southern half of the western sea board, the distribution of marine activities is much more evenly spread out for the domestic tourism market. The patterns observed suggest that marine spatial policy makers may need to be more aware of conflicts between domestic recreational users of the marine environment and other user groups given the more diverse spatial pattern of these activities, while at the same time recognising the heavy use of certain coastal waters by overseas visitors at particular times of the year. The Department of Housing, Planning and Local Government should also take special note of the spatial pattern of marine tourism activity as it brings forward its planned legislation to designate Marine Protected Areas in 2020. Sustainable forms of marine tourism should still be possible in protected areas and their designation can actually lead to increases in tourism activity in a region.

The spatial patterns observed also have important implications for potential investment in infrastructure. If the policy objective is aimed at increasing the participation of residents in marine activities or increasing the connection of the population to the marine environment from the perspective of improved well-being, then ensuring easy access to the coast in all areas, to as broad a range of persons as possible, would seem like a worthwhile endeavour. However, if the policy objective is aimed at encouraging an increase in the higher spending marine active overseas tourists, then ensuring investment in specific marine related activity facilities in already popular locations along the west coast may be a more worthwhile target.

Given its potential for further growth across the regions, coastal and marine tourism in Ireland deserves further research attention and policy focus. While the overseas market is often the main focus of the tourism development agencies, the domestic market also offers significant opportunities for growth, and innovations in delivering new visitor experiences for this market should be examined. Ireland has a long and interesting maritime history that may not be as well-known as it should be amongst the general public. This is a broad subject area that could allow for the development of new visitor attractions and events aimed at the domestic market in particular. The Irish government's National Marine Research & Innovation Strategy 2017–2021 noted that research in the area of marine tourism is "Ad-hoc" and suggested that other topics worthy of further research are performance and destination development benchmarking, consumer research and trends, citizen/community engagement and awareness and a national maritime interpretation strategy.

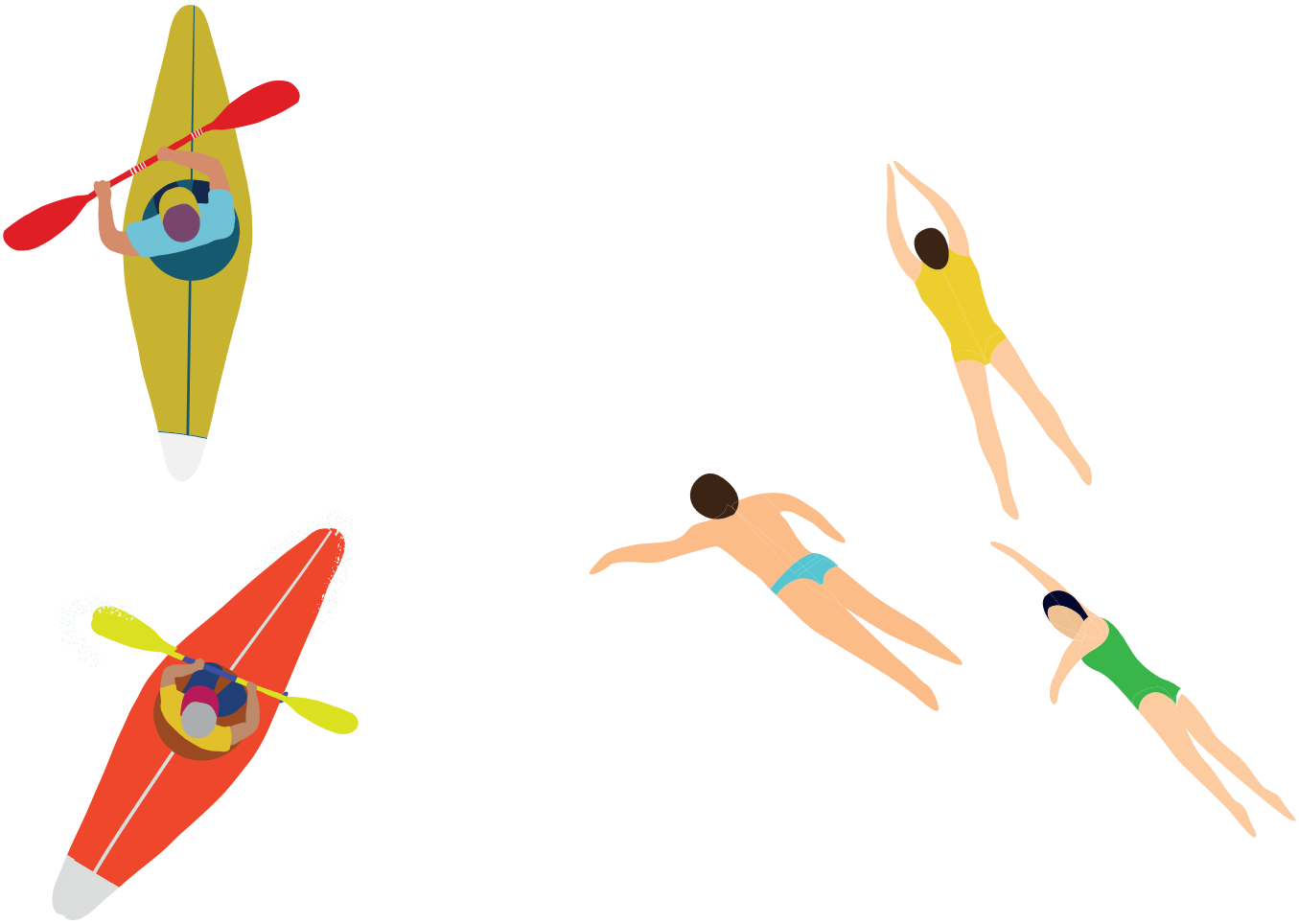
According to the Interreg Europe Policy Learning Platform on Environment and Resource Efficiency (2018), one of the main challenges for developing any form of sustainable tourism around cultural and natural heritage assets is striking the right balance between engaging in profitable activities and at the same time not damaging the assets – "Finding this balance requires high level of awareness among citizens and policy makers of the vulnerability of the assets and the careful approach which goes with it". In the case of sustainable tourism and recreation in marine and coastal areas, this balancing act suggests the need to increase awareness amongst the public and policy

[44] Britton, E., Kindermann, G., Domegan, C., and Carlin, C. (2018). Blue care: a systematic review of blue space interventions for health and wellbeing Health Promotion International, 1–20, doi: 10.1093/heapro/day103

Marine tourism represents **19%** of total domestic tourism spend

makers of the link between marine cultural and natural assets and potential new innovative marine tourism products. This link can already be seen in such initiatives as the Great Lighthouses of Ireland, the Loop Head Coastal Walk and the cruise tours to the Cliffs of Moher in Co. Clare and to Siabh Liag in Co. Donegal.

Finally, the expenditure estimates produced here for domestic coastal and marine tourism along with the expenditure estimates from the overseas tourism report carried out by SEMRU in 2019 allows for the calculation of total marine and coastal tourism expenditure in Ireland. Combining both the total overseas tourism estimates from SEMRU (2019) with the estimates generated in this report suggests that the total coastal tourism expenditure was approximately €2.63 billion in 2018, while total marine tourism generated €1,031 million. This latter figure represents 13% of total tourism revenue (excluding carrier receipts) (€7,664.9m), calculated by FI for 2018 and demonstrates the key contribution that vibrant coastal communities and a healthy marine environment makes to one of Ireland's most important indigenous industries.



[26] DHPLG (2019). Marine Planning Policy Statement, Government of Ireland Publication, Dublin.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Appendix

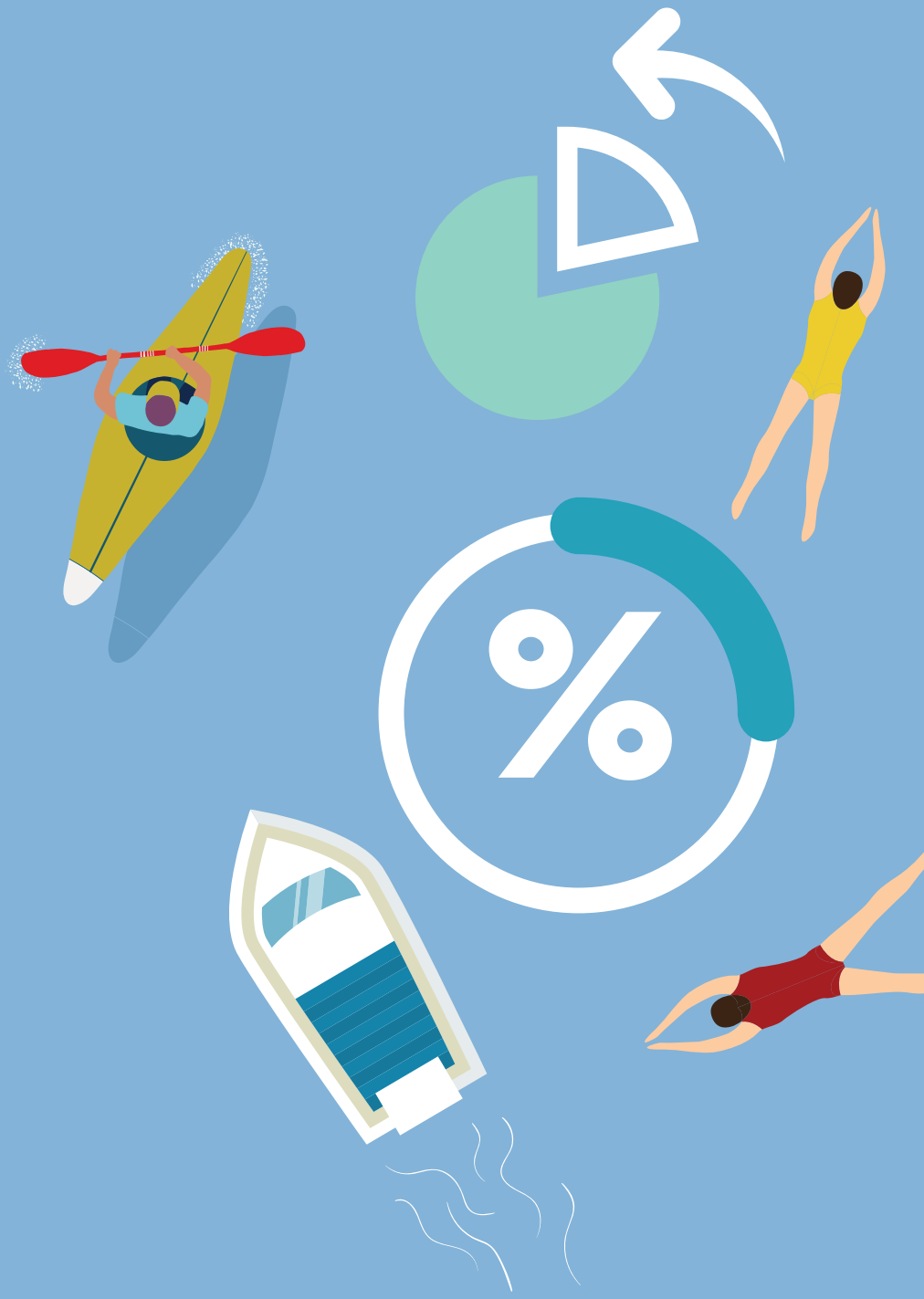


Table A1.
Statistical differences in the percentage of respondents participating in water-based tourism activities across the social classes

Statistically significant mean percentage differences (at 5% level)														
	Higher managerial (1)		Intermed. Professional (2)		Clerical, junior, student (3)		Skilled worker (4)		Semi/ unskilled worker (5)		Casual worker/ unemployed (6)		Farmer/ farm worker (7)	
	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO
1				✓	✓		✓		✓		✓		✓	
2		✓				✓	✓		✓		✓		✓	
3	✓			✓				✓		✓	✓		✓	
4	✓		✓			✓				✓	✓		✓	
5	✓		✓			✓		✓			✓		✓	
6														✓
7	✓		✓		✓		✓		✓			✓		

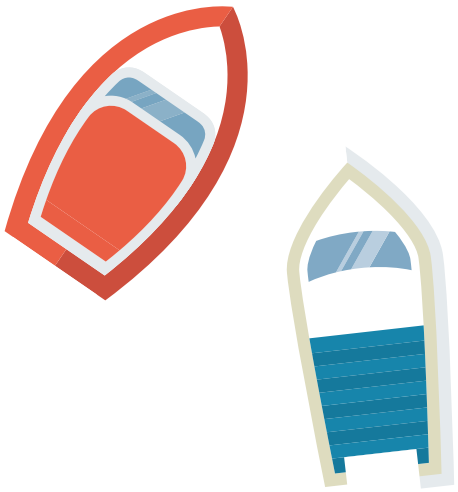
Table A2.
Statistical differences in the percentage of respondents participating in marine related activities across the social classes

Statistically significant mean percentage differences (at 5% level)														
	Higher managerial (1)		Intermed. Professional (2)		Clerical, junior, student (3)		Skilled worker (4)		Semi/ unskilled worker (5)		Casual worker/ unemployed (6)		Farmer/ farm worker (7)	
	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO
1				✓		✓	✓		✓		✓		✓	
2		✓				✓		✓		✓	✓		✓	
3		✓		✓				✓		✓	✓		✓	
4	✓			✓		✓				✓	✓		✓	
5	✓			✓		✓		✓			✓		✓	
6	✓		✓		✓		✓		✓					✓
7	✓		✓		✓		✓		✓			✓		

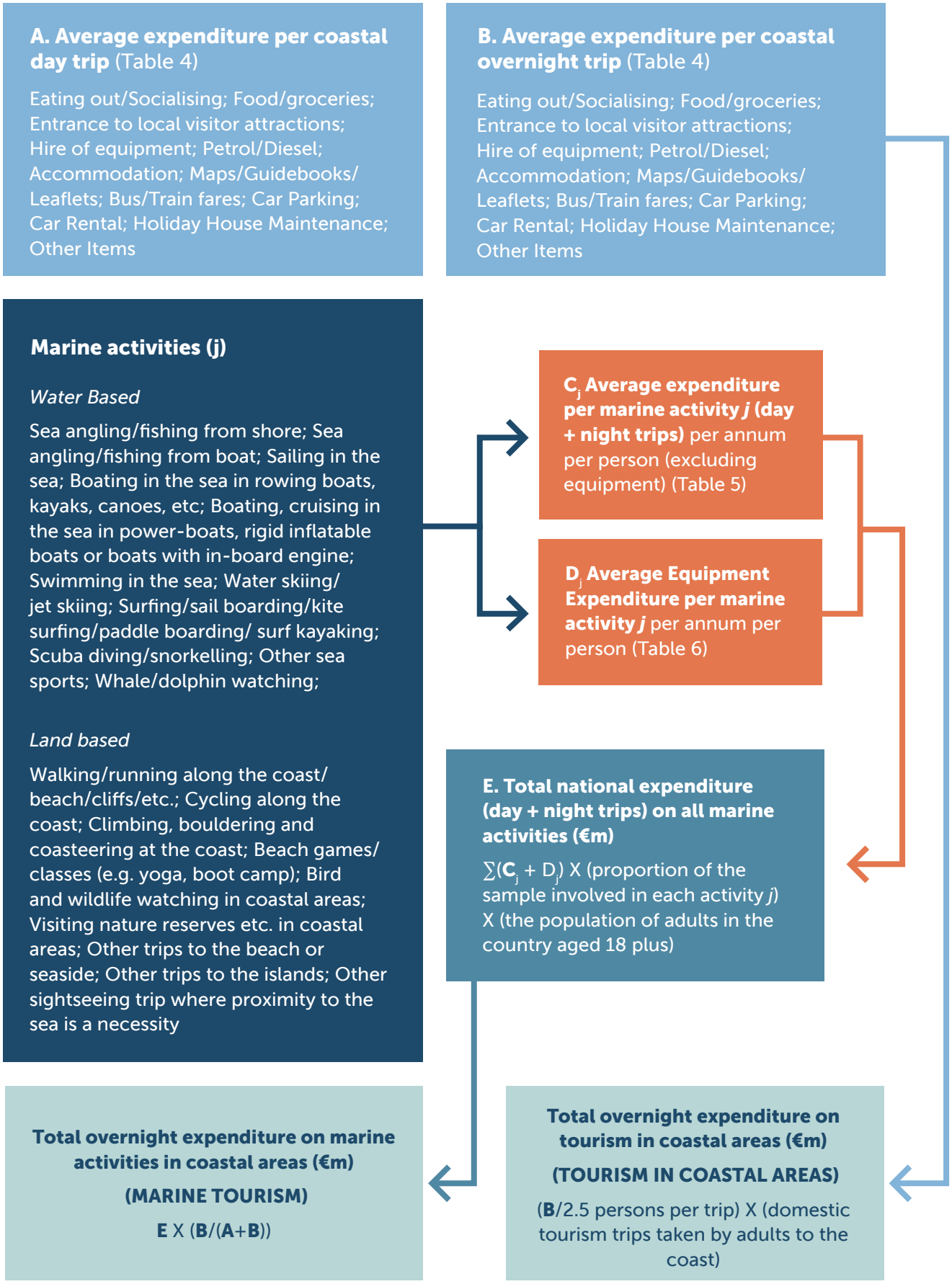
The numbers in the first column of Tables A1 and A2 correspond to numbers associated with each social class shown in second rows.

Table A3.
Marine Activities by Number of Participants by County on Overnight Trips

	Clare	Cork	Donegal	Dublin	Galway	Kerry	Kilkenny	Leitrim	Limerick	Louth	Mayo	Meath	Sligo	Waterford	Wexford	Wicklow	Grand Total
Angling boat	6	7	6	3	4	3	0	1	0	0	2	0	2	0	0	0	34
Angling shore	4	6	1	0	3	7	0	0	0	0	1	0	1	3	0	1	27
Beach games	3	3	2	1	5	4	0	0	0	0	6	0	2	7	3	0	36
Bike	10	5	5	3	12	14	1	1	0	0	10	0	2	11	6	1	81
Boating no power	8	4	4	1	8	9	0	1	0	0	7	1	3	3	2	0	51
Boating power	3	9	9	5	11	4	0	2	0	0	4	0	5	3	0	0	55
Coasteering	4	0	3	0	8	5	0	0	0	0	4	0	2	4	5	3	38
Dive	4	1	4	2	2	9	0	0	0	0	9	0	6	3	0	0	40
Islands trip	10	4	2	1	4	10	1	0	0	1	13	1	1	1	2	1	52
Nature reserve	10	6	2	4	12	9	1	1	1	0	12	1	1	6	5	2	73
Other (beach)	18	13	8	4	13	18	1	0	0	0	15	2	4	10	8	2	116
Other sea sport	5	2	4	1	3	7	0	0	0	0	8	0	1	2	0	0	33
Other sightseeing	12	10	10	1	13	13	1	0	0	0	12	0	2	11	12	0	97
Sailing	4	4	4	4	2	8	0	1	0	0	3	0	1	5	3	0	39
Surfing	9	2	9	2	8	10	0	0	0	0	6	0	12	5	2	1	66
Swim	21	22	14	11	20	26	0	0	0	0	15	0	7	24	18	2	180
Walking	29	35	25	11	41	37	5	2	0	2	32	1	9	31	29	7	296
Water ski	1	0	1	0	4	4	0	0	0	0	3	0	6	1	0	0	20
Whale watch	6	1	7	1	5	14	0	0	0	0	11	0	1	0	0	0	46
Wildlife watch	3	2	4	1	8	7	0	0	0	0	7	0	3	3	2	1	41
Grand Total	170	136	124	56	186	218	10	9	1	3	180	6	71	133	97	21	1421



A4. Methodology
Domestic Coastal and Marine Expenditure Category Flowchart



A note on aggregate domestic tourism trip numbers

A number of considerations should be noted in relation to the tourism trip numbers used to aggregate total expenditure figures.

- Fáilte Ireland's broad definition of domestic tourism that comes from CSO Household Travel Survey (HTS) data includes business and other reasons for taking overnight trips. As shown in the table below this amounts to 10,919 thousand domestic tourism trips in 2018.
- This report used the 9,082 thousand domestic trips that come from the "Holiday" or "Visiting friends/relatives" categories as the relevant domestic market for the purpose of examining coastal and marine tourism.

Number of Domestic Trips by Irish Residents (Thousand) by Reason for Journey 2018

Reason for Trip	Trip Number
Holiday	5,323
Business	473
Sporting events	387
Work/looking for work	130
Education and training	183
Visiting friends/relatives	3,759
Other reasons	664
Total Trips	10,919

Source: CSO HTS https://statbank.cso.ie/px/pxeirestat/Statire/SelectVarVal/saveselections.asp

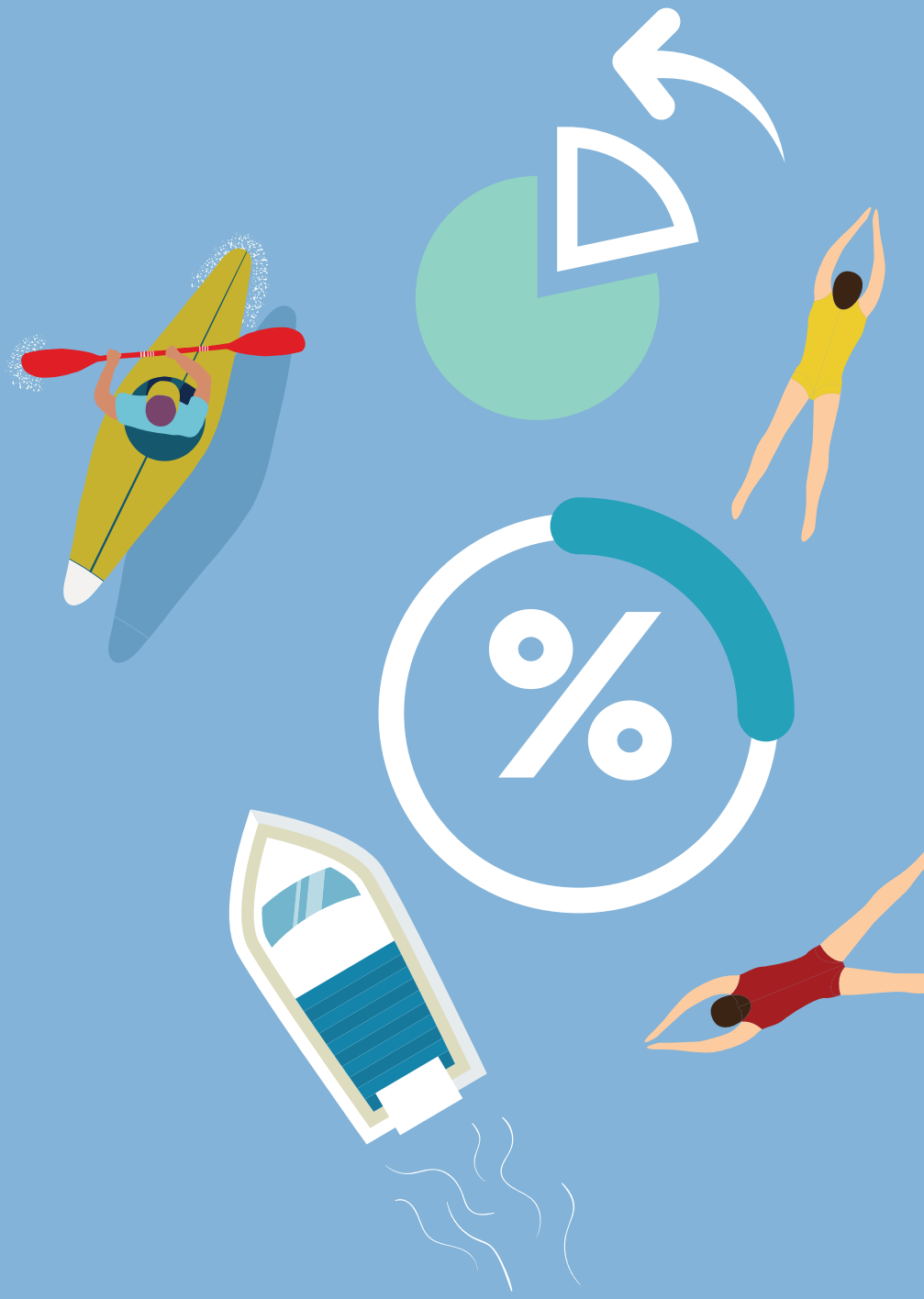
- Based on the fact that 43% of the sample undertook a coastal overnight trip it was estimated that 3,905.26 thousand was the total for domestic coastal tourism trips.
- Given that 39% of those on overnight trips participated in marine activities 1,523 thousand is taken as the estimated number of marine tourism trips.
- The CSO HTS figures also include trips taken by children. 2,869 thousand of the total 10,919 thousand domestic tourism trips are for individuals in the age bracket 0 -19 (26%). https://statbank.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=HTA02&PLanguage=0
- The aggregate expenditure figures for domestic tourism in coastal areas in the report is based on trip total for adults aged 18 plus, i.e. we adjust for the number of children in the estimated 3,905.26 thousand domestic coastal tourism trips. The total domestic overnight trips by adults to coast for holiday trips or visiting friends/family was therefore estimated to be 2,943.33 thousand.
- The aggregate expenditure figures for marine tourism in the report is calculated by multiplying the per person expenditure estimates for each activity by the proportion of the sample involved in each activity, by the population of adults in the country aged 18 plus.

Figure A1. Number of participants across activities by day trips, overnight trips and both day and overnight trips

Notes

NUI Galway
OÉ Gaillimh

SEMRU
Socio-Economic Marine Research Unit



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