

2003

A National Survey of Water-Based
Leisure Activities in Ireland 2003



Marine Institute
Foras na Mara

A National Survey of Water-based Leisure Activities 2003

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Executive Summary

This survey profiles the domestic market for water-based tourism, sport and leisure in Ireland. The data provides up-to-date statistical information on 18 water-based leisure activities broadly grouped under the following categories: Seaside/Resort trips; Angling; Coastal and Inland Boating; and Watersports. The objective of the survey is to demonstrate the significant contribution of marine leisure activity to the national economy, and to highlight emerging trends and the potential for development of our water-based leisure resources.

A key finding of the survey, conducted by the ESRI in 2003, is that marine leisure activity based on Ireland's marine and freshwater resources generates €434 million in expenditure by Irish residents, and approximately 5,100 jobs are supported by this level of expenditure. A comparison of the domestic tourism market and the water-based tourism domestic market further highlights the value of the sector. In 2003, water-based tourism accounted for 22 per cent of the domestic tourism market and generated 45 per cent of domestic tourism revenue.

	Participants (000's)	Revenue (€M)	Employment (000's)
Domestic Tourism Market	6,657	€970.9	22,300
Water-based Domestic Market	1,475	€433.6	5,100

Our seaside resorts, beaches, inland waterways and rivers provide the resource for a wide range of water-based tourism recreation, sport and leisure activities. The survey results show that 1.48 million persons, representing 49 per cent of the adult population participated in some form of water-based activity during the survey period. Although overall satisfaction with facilities was high, a further 10 per cent of the adult population (294,100) said they would take up some marine leisure activity if facilities were better. This demonstrates the potential and scope for development in the sector.

Seaside/Resort Trips

The combined effect of the two most popular marine leisure activities of trips to the beach/seaside and swimming in the sea generated €278 million in domestic tourism revenue, supporting the equivalent of 3,200 jobs in coastal communities.

The survey results show that while there has been no substantial change in participation rates across most activities (when compared to a similar survey conducted in 1996), the exception to this trend is for swimming in the sea. A comparison between the two surveys shows that in 1996 an estimated 538,800 participated in this activity compared to 353,500 in 2003. While environmental concerns about 'pollution' featured strongly as a negative comment and was cited by almost a third of beach visitors and 19 per cent of swimmers, 'lack of facilities' was seen as the most negative issue and this was reflected across all respondents engaging in water-based activities. Almost 71,000 beach users and 37,000 swimmers said they would increase their participation if facilities were better.

Angling

Angling continues to hold a strong position in the Irish marine leisure activity sector. Over 218,000 people undertook 3 million day trips and 112,000 overnight trips involving angling. This activity generated the equivalent of €59 million in domestic tourism revenue and supported over 733 jobs. The highest revenue-generating angling activity is freshwater game angling and the greatest proportion of expenditure on angling activity is on equipment.

The most significant fact to emerge from this survey's data is that there appears to be a halt in the declining numbers of those engaging in angling as an activity (190,000 in 1996). The degree of change recorded is encouraging in that, for example, although the total per cent of adults involved in any angling activity remained constant, the total for those involved in sea angling from the shore and from a boat have both demonstrated an increase. The issue of 'pollution' featured strongly among coarse anglers and 'poor fish stock' was mentioned by 15 per cent of game and seashore anglers. A significant 39,000 survey respondents said they would take up angling if relevant facilities were improved.

Coastal and Inland Boating

Domestic spend on boating at sea and on inland waterways generated almost €50 million, supporting the equivalent of 661 jobs. Boating activity accounted for almost 1.5 million day trips and 148,500 overnight trips during 2003. An estimated 142,800 adults engaged in some form of boating activity ranging from sailing/boating at sea to cruising on inland waterways. The most popular boating activity was sailing at sea, which accounted for an estimated 606,000 day trips and 82,500 overnight trips, generating domestic revenue of €24.7 million.

Participation in boating/sailing shows a marked decline between different age groups, from 7.3 per cent among 16-29 year olds to 3.4 per cent among 50-60 year olds. When the data for boating activity in 2003 is compared to the data collected in 1996, we can see that, while the overall number of participants remains constant, the per cent of the adult population engaging in boating/sailing fell from 5.5 per cent (1996) to 4.7 per cent (2003).

In addition to information on boating activity, data was collected on boat ownership and the type of vessels normally used by participants. The profile of leisure boating which emerged provides sound statistical data for planning to meet the development needs of this high value sector. Over 60 per cent or 30,000 of those who go sailing/boating at sea claim to own their own boat. This compares to 14,000 or 38 per cent ownership amongst those who go sailing/boating on inland waterways.

'Lack of facilities' was the most frequently quoted criticism amongst boating enthusiasts with 'poor access' being an issue among those who use small craft such as row boats and canoes. Almost 13,200 of those who currently engage in sailing/boating at sea and 8,400 who go boating/sailing on inland waterways indicated they would increase their level of participation if facilities were improved. More significantly, a further 68,000 indicated their intention to take up some form of boating at sea activity and 11,800 would take up inland cruising activity if facilities improved.

Watersports

For the purpose of this survey, watersports activity was categorised into four groups namely: Water skiing/jet skiing; Surfing/sail boarding; Scuba diving/Snorkelling; and "Other Sea Sports". The survey results show both an overall increase in numbers engaging in watersports in general and in the corresponding domestic tourism spend. Watersport enthusiasts generated over €35 million in revenue, more than half of which was spent on equipment. A total of 483,200 day trips and 37,000 overnight trips were recorded for 2003. Over 90 per cent of the total number of overnights attributable to watersports activity were accounted for by those involved in both surfing/sail boarding and scuba diving/snorkelling.

Although concern about 'pollution' was expressed, 'lack of facilities' was seen to be more of an issue and was mentioned by 70 per cent of surfers, and 45 per cent of water/jet skiers. As further proof of the growing interest in and awareness of watersports, over 89,000 adults expressed an interest in taking up some watersport activity if facilities improved and a further 9,500 said they would participate more frequently, given good facilities.

Nature-related Coastal Activities

While not easy markets to target, these are nevertheless niche tourism markets and include activities such as visiting nature reserves in coastal areas; whale/dolphin watching and bird watching in coastal areas. During 2003 this type of marine leisure accounted for 316,000 day trips and 39,400 overnight trips, thereby generating €12.3 million in domestic revenue. The survey shows that 33,000 people visited islands, spending 51,000 overnights in this activity. There appears to be a decline in the numbers who go whale watching and bird watching. In terms of potential for development, a high per cent of those who go whale/dolphin watching were dissatisfied with the facilities, and those who visit the islands and go bird watching also cited 'lack of facilities' as an issue.

Conclusion

There is a considerable amount of information in this report which profiles water-based tourism and leisure activities. The public and private sectors with an interest in any aspect of water-based tourism, sport and leisure can utilise the report's data to gain a better understanding of the overall development needs and growth potential areas.

There is evidence that, despite a strong domestic economy, water-based tourism and leisure activities in Ireland are not demonstrating positive growth trends. There is also evidence of a fall-off amongst participants in the 16-29 age group, and this has significant implications for the sustainability of the sector. A key finding of the survey suggests that improved facilities would result in increased levels of participation and new opportunities for revenue generation. There is a clear demand for improved and appropriate facilities at beaches and seaside resorts, for small boats activity, and for popular watersports such as surfing and water/jet skiing.

If the sector is to achieve its true development potential, priority must be given to investment in infrastructure and innovative development which is aimed at increasing participation of youth and young adults in water-based sport and leisure activities, and which meets modern day water-based tourism expectations.

Anne Wilkinson

1 Introduction

Origin and Objectives

In March 2003, the Marine Institute commissioned the ESRI to conduct a follow-up study of the 1996 national survey of water-based leisure activities in Ireland. The 1996 report provided a profile of the domestic market for marine leisure activities at that time and highlighted the important economic contribution of the sector, which was estimated at €303 million per annum.

The objective of the 2003 study was to provide an evaluation of the marine leisure sector and to benchmark performance of the sector since the initial survey was undertaken in 1996. The study provides a broad indication of current participation levels in water-based leisure activities by Irish residents and expenditures involved. Water-based leisure activities have been categorised in this report as follows:

Angling	
1	Freshwater angling for coarse fish (pike, bream, roach, perch etc.)
2	Freshwater angling for game fish (trout, salmon, sea trout)
3	Sea angling from the shore
4	Sea angling from boat
Sailing/Boating	
5	Sailing at sea.
6	Boating at sea in rowing boats, canoes etc. (with or without out-board engine)
7	Boating, cruising at sea in power-boats, rigid inflatable boats (RIBS) or boats with in-board engine.
8	Cruising/boating on inland waterways.
Seaside/Resort Trips	
9	Swimming in the sea
10	Whale/dolphin watching
11	Bird watching in coastal areas
12	Visiting Nature Reserves in coastal areas
13	Other trips to the beach or seaside
14	Other trips to the Islands
Watersports	
15	Water skiing/jet skiing
16	Surfing, Sail Boarding
17	Scuba Diving, Snorkelling
18	Other Sea Sports

An analysis of the current domestic marine leisure market will provide relevant data to identify performance indicators for the sector. The report will also be utilised for determining a long-term development strategy for the marine leisure sector and for future policy decisions. This report is presented in two parts as follows:

- Part A** Sections 1 – 6 give an overall evaluation of the domestic market for water-based leisure activities.
- Part B** Sections 7-10 give a summary evaluation of the domestic market for angling; coastal and inland boating; watersports; and seaside/resort trips.

2 Methodology

Introduction

The survey methodology was designed to ensure that, as far as feasible, survey results were comparable with the earlier 1996 report. The objective was to record participants' attitudes and behaviour, and to draw comparisons with the 1996 survey to benchmark the performance of the domestic water-based leisure market.

The Questionnaire

The survey was conducted by adding a module of questions to the on-going monthly Consumer Sentiment Survey, conducted by the ESRI on behalf of the European Commission. The questions asked of all respondents to the Consumer Survey are shown in Appendix A. Each respondent was asked whether or not he/she had participated in any of the 18 specified water-based leisure activities during the period 2002/3 (from April 2002 to June 2003), the number of day and overnight trips involving the activity and the costs associated with day trips such as equipment, supplies and average expenditure. Details of the nature and ownership of vessels principally used by those who went sailing/boating were collected. Respondents were also queried about their level of satisfaction with facilities in Ireland for each activity engaged in. We also enquired if respondents would have participated more, or would have started to participate in any of the activities, if facilities in Ireland were better. Finally, comments or criticisms relating to facilities or the marine environment in general were sought and information was collected about overnight trips - their purpose, duration, cost and the numbers of people involved.

Standard demographic details such as age, gender, and occupation were collected as part of the main Consumer Survey.

Sampling

The water-based leisure questionnaire was undertaken by telephone in conjunction with the Consumer Survey in the months of April, May, June and July 2003. Each month, the survey sample is an independent random sample of persons selected in two stages. First, a total of 50 sampling points are selected nationally from the Electoral Register. Within each sampling point, 100 telephone numbers are generated at random, and interviewers are required to complete 25 questionnaires from these numbers. The respondents interviewed are required to conform to controls based on age, sex and employment status of members of the household aged 16 years or over. This results each month in a random sample of approximately 1,200 persons being interviewed. All completed forms were returned to the ESRI for validation, checking, coding, data entry and analysis. The total number of completed interviews in each month was as follows:

Table 2.1: Total Interviews Completed

Month	Completed Consumer Survey	Completed Marine Leisure Survey
April	2,098	1,109
May	2,091	1,113
June	1,946	1,060
July	2,062	1,118
Total	8,197	4,400

Weighting and Sampling Errors

The objective of the present study is to make statements about the behaviour and opinions of the population aged 16 and over in relation to water-based leisure activities, and draw comparisons with the earlier study carried out in 1996.

In order to allow for the effects of differential non-response during interviewing, the data collected had to be weighted or statistically adjusted prior to analysis. The purpose of this re-weighting procedure is to compensate for any biases in the distribution of characteristics in the completed sample as compared to the population of interest – in this case the population of persons aged 16 years or more living in private households. To re-weight the collected data, the distributional characteristics of the sample were adjusted in line with important analytical variables. This involved comparing the socio-economic characteristics of the sample with external population controls (from the Quarterly National Household Survey Q2 2002 and Q2 2003). Re-weighting the data means

that the figures shown in the tables represent our best estimates of the population total in various categories. The total population in question is approximately 3.01 million persons.

As shown opposite in Table 2.1, the sample comprises 4,400 interviews. The estimates are therefore subject to errors due to sampling fluctuations. To provide an indication of the likely orders of magnitude of these errors, we have calculated the confidence intervals for a number of percentages for the total sample and sub-samples of 3,000, 1,000 and 500 (See Table 2.2).

The first row of this table shows that if the full sample of 4,400 is used and the observed percentage of some variable (say Jet skiing) was 50 per cent, the margin of error or so-called “confidence interval” would be ± 2.22 percentage points. This means that the true value of the observed percentage in the population would lie between 50 ± 2.2 (i.e. between 47.8 and 52.2 per cent). If, however, the sample size were to fall dramatically to, say 500, the confidence interval around an observed percentage of 50 per cent would be ± 6.57 percentage points (i.e. 43.43 – 56.57). A similar interpretation applies to the other rows in the table. The smaller the number of cases for analysis, the wider the confidence interval (or potential margin of error) will be.

Table 2.2: 95% confidence intervals for various observed percentages based on samples of varying size from 4,400 to 500.

Observed percentage	Sample Sizes			
	4,400	3,000	1,000	500
50%	2.22	2.68	4.65	6.57
40%	2.17	2.63	4.55	6.44
30%	2.03	2.46	4.26	6.03
20%	1.77	2.15	3.72	5.26
10%	1.33	1.61	2.79	3.94
5%	0.97	1.17	2.03	2.87

Note: Figures based on 95% confidence level assuming a Simple Random Sample taking a design effect of 1.5 to account for the two stage sampling procedure used in the sample design.

3 Participation Levels

Introduction

This section analyses participation in all categories of water-based leisure activities during 2002/3, as recorded for the 18 pre-coded water-based leisure activities in the questionnaire. For each of these activities overall levels of participation are described. Participation levels are classified by gender, age, occupation, education and by the presence of children in the household.

Overall Participation

Table 3.1: Number of respondents participating in each leisure activity.

Activity	2003 Total Participants (000's)	1996 Total Participants (000's)
ANGLING		
Freshwater Angling for coarse fish	66.5	66.2
Freshwater Angling for game fish	80.5	76.4
Sea Angling from the shore	74.1	53.6
Sea Angling from boat	53.0	34.3
Any type of Angling	218.0	190.0
COASTAL & INLAND BOATING		
Sailing at sea	58.8	49.9
Boating at sea in row boats, canoes etc.	32.1	*
Boating in power boats etc. at sea	24.6	*
Cruising/boating on inland waterways	42.8	30.1
Any type of Boating or Sailing	142.8	143.9
WATERSPORTS		
Water Skiing, Jet Skiing	19.2	*
Surfing, Sail boarding	17.8	*
Scuba Diving, Snorkelling	9.1	*
Other Sea Sports	7.3	*
SEASIDE/RESORT TRIPS		
Swimming in the sea	353.5	538.8
Whale/Dolphin Watching	9.6	15.9
Bird Watching in coastal areas	12.4	31.2
Visiting Nature Reserves etc. in coastal areas	43.5	84.6
Other trips to the beach or seaside	1,134.6	1,047.8
Other trips to the islands	33.2	*
Any of the above water-based leisure activities	1,475.8	1,468.2
All Adults in the population	3,013.6	2,634.0

*Comparable figures for these activities are not available from the 1996 survey. In the 1996 survey boating at sea in row boats, canoes etc. were not identified separately. Neither were watersports, such as water skiing, jet skiing; surfing; sail boarding; scuba diving; snorkelling; other sea sports and trips to the islands.

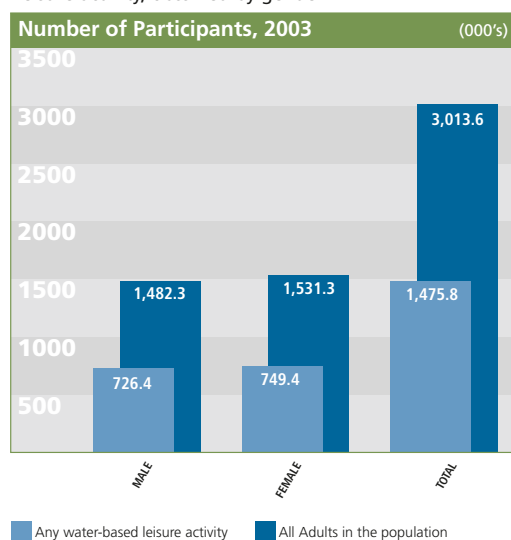
Just under half (49 per cent) of the adult population aged 16 years or over report having participated in some form of water-based leisure activity in the year preceding the survey (Table A3.1, Appendix B). This represents 1.48 million adults of the total adult population of 3.014 million in the country. It should be noted that there was a fairly substantial increase in the national population of persons aged 16 years and over in the period 1996 to 2003. The adult population grew by 379,600 persons over the period in question rising from 2.634 million persons in 1996 to 3.014 million in 2003. In interpreting the results it should be noted that the different figures given in the tables are not mutually exclusive. The same respondent can, and does, take part in different activities. For example, a person could be both a game and coarse angler, hence the numbers involved in all types of angling are lower than the sum of the numbers involved in different forms of angling. This applies equally to all categories of activities.

A comparison between the 2002/3 participation levels and those of 1996 shows that overall participation in any marine-based leisure activity fell by 7 percentage points. While the degree of change across most categories of activities is not excessive, the exception to this trend is found in swimming in the sea. Here there was quite a substantial fall in participation rates from 20.4 per cent in 1996 to 11.7 per cent in 2003¹, a fall-off of almost 9 percentage points.

Gender

Overall participation in water-based leisure activities is equally balanced between the sexes. Approximately 49 per cent of both men and women participated in some form of water-based leisure activity in the year preceding the survey (Table A3.3, Appendix B).

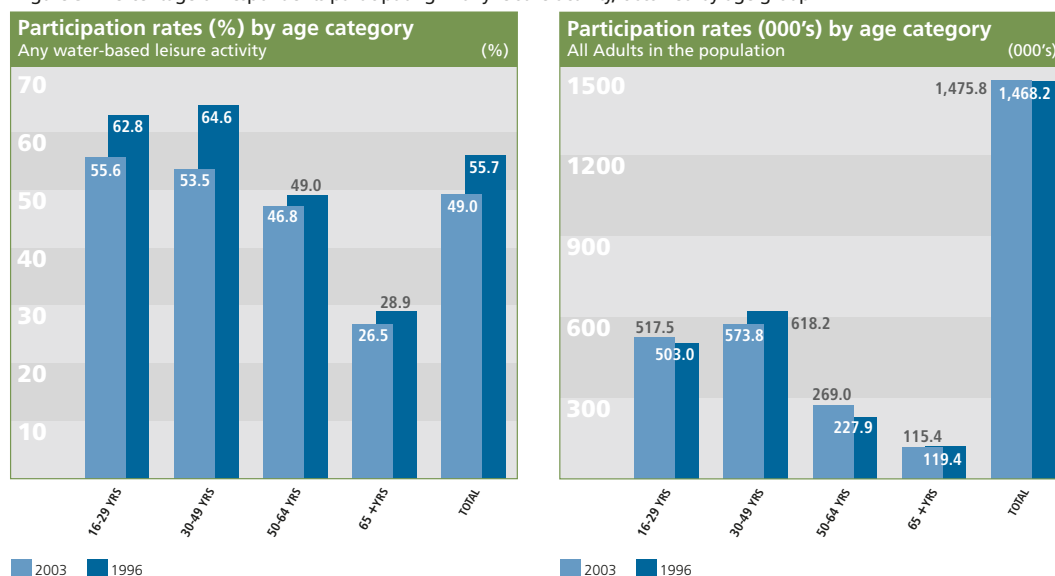
Figure 3.1 Number of respondents participating in any leisure activity, classified by gender.



¹ Given the sample sizes involved in both rounds of the survey (i.e. in 1996 and 2003) the magnitude of this fall indicates a statistically significant and real change in behaviour patterns. Appendix B, Table A3.2 provides details on confidence intervals around the estimated number of participants in each activity in both 1996 and 2003.

Age

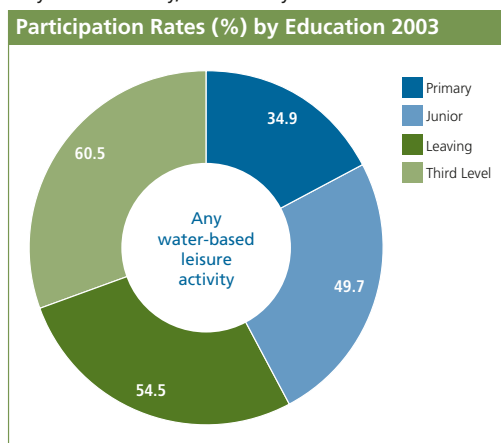
Figure 3.2 Percentage of respondents participating in any leisure activity, classified by age group.



In general, participation in marine leisure declines with age and the more physically demanding the activity, the more sharply participation rates decline. Overall, participation in any water-based activity exceeded 50 per cent for those aged under 50, fell to almost 47 per cent for those aged 50-64, and to approximately 27 per cent for persons aged 65 or more. However, comparisons with levels of activity in 1996 indicate that participation rates for each of the age cohorts are somewhat lower across all age categories (Table A3.4, Appendix B).

Education

Figure 3.3 Percentage of respondents participating in any leisure activity, classified by education level.



It is evident that participation in marine leisure activity increases very strongly with increases in the highest level of education completed. However, in interpreting these figures it must be noted that there is a strong link between the highest level of education completed and the age of the respondent. The proportions of persons leaving education at the lower levels are much higher among older age groups than younger groups. When controls for age of respondent were applied, it was found that education does not seem to impact substantially on the likelihood of participation among young persons aged 16-29 (Figure 3.3 and Table A3.5, Appendix B).

Social Class

The social class category used refers to the person's current or former occupation. If he/she never worked, the occupation of the main earner in the household is used. Participation in water-based leisure activities is highest among the professional/managerial group and lowest amongst the farming sector and skilled and unskilled manual workers (Table A3.6, Appendix B).

Figure 3.4 Percentage of respondents participating in any leisure activity, classified by social class.

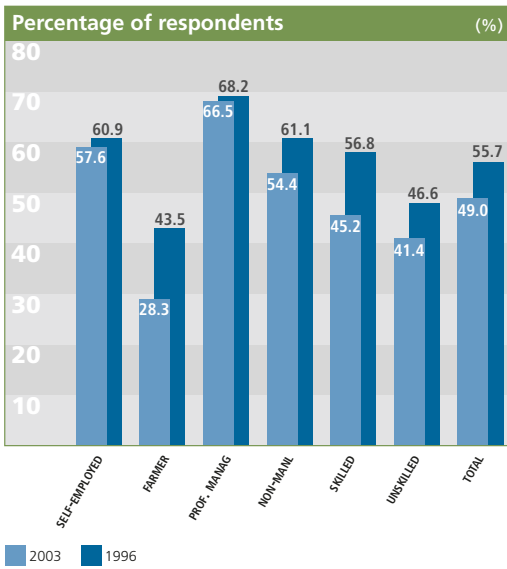
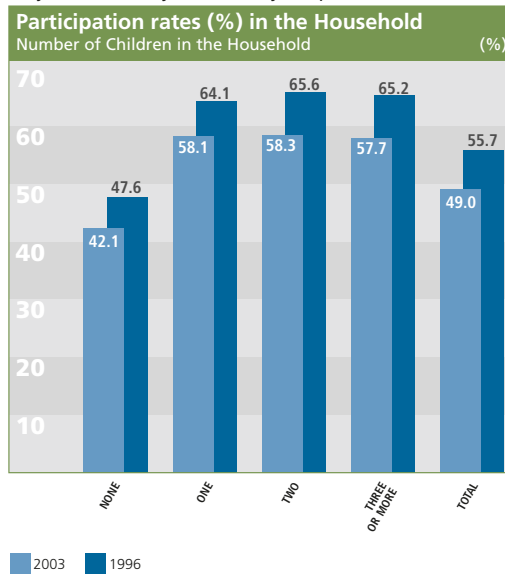


Figure 3.5 Percentage of respondents participating in any leisure activity, classified by the presence of children.



Presence of Children in the Household

For all activities, respondents from households with children are more likely to participate in water-based activities than those from households with adults only (Table A3.7, Appendix B). The participation of households with one child or more is consistently higher across all activities. Among households with children, the most popular activities are angling, swimming in the sea and trips to the beach or seaside.

4 Frequency of Participation

Introduction

In this section we examine the frequency with which respondents reported participating in the various activities during the year preceding the survey. Normally in survey work a year would be considered rather a long recall period. However, given the highly seasonal nature of many of the activities, it was felt advisable to ask respondents about the full 12-month period. The estimates presented below are, of course, subject to any recall errors that may have arisen.

We begin by presenting information on the number of day trips which respondents participated in for the different activities and follow with information on trips involving at least one overnight stay.

Day Trips

Table 4.1: Estimated total day trips, and average number of day trips per participant for each leisure activity.

Activity	2003		1996	
	Total Day Trips (000's)	Average No. of Days per Person	Total Day Trips (000's)	Average No. of Days per Person
ANGLING				
Freshwater Angling for coarse fish	570.8	8.6	807.6	12.2
Freshwater Angling for game fish	1,130.8	14.0	970.3	12.7
Sea Angling from the shore	1,065.3	14.4	627.1	11.7
Sea Angling from boat	338.5	6.4	349.9	10.2
COASTAL & INLAND BOATING				
Sailing at sea	606.4	10.3	638.7	12.8
Boating at sea in row boats, canoes etc.	373.2	11.7	*	*
Boating in power boats etc. at sea	211.6	8.6	*	*
Cruising/boating on inland waterways	276.7	6.4	192.6	6.4
WATERSPORTS				
Water Skiing, Jet Skiing	160.1	8.3	*	*
Surfing, Sail boarding	179.8	10.1	*	*
Scuba Diving, Snorkelling	117.4	12.7	*	*
Other Sea Sports	25.9	3.6	*	*
SEASIDE/RESORT TRIPS				
Swimming in the sea	2,779.2	7.9	7,381.6	13.7
Whale/Dolphin Watching	17.4	1.8	52.5	3.3
Bird Watching in coastal areas	123.5	9.7	421.2	13.5
Visiting Nature Reserves etc. in coastal areas	122.4	2.8	448.4	5.3
Other trips to the beach or seaside	21,279.9	18.8	15,717.0	15.0
Other trips to the islands	52.3	1.6	*	*
All Adults in the population	29,431.2		28,812.1	

*Comparable figures not available from 1996 survey.

Table 4.1 details the total number of day trips per annum and the annual average frequency with which respondents engaged in each of the activities. An estimated total of 29.4 million day trips were generated by those engaged in marine leisure activity. The greatest number of day trips arose from the relatively generic other trips to the beach/seaside, and swimming in the sea, which accounted for 21.3 million and 2.8 million day trips respectively. Other activities generating more than 500,000 day trips included most angling activities, and sailing at sea. Overall, the number of day trips generated declined progressively with increasing specialisation of the leisure activity involved, with the smallest number being associated with whale/dolphin watching. The annual average frequency with which respondents engaged in each of the activities on a day trip basis ranged from 1.6 for trips to the islands to 18.8 for trips to the seaside. This latter category would include all trips to the seashore.

Overnight Trips

Participation during holidays or on other overnight trips is more difficult to evaluate than day trips. In the course of the survey respondents were asked to record the number of trips involving at least one overnight made in connection with any of the leisure activities. We then asked details about the trip (or the typical/usual trip if there was more than one); activities involved; whether these were the main purpose of the trip; usual or average length of trip; and usual party size, broken down into numbers of adults and children. The results are shown in Table 4.2, which is divided into three sections (see next page).

Section A provides details on the number and percentage of participants who had at least one overnight trip. The highest incidence of overnight trips was among those who visited islands (57 per cent) and although the number of participants in scuba diving/snorkelling was not significant in comparison, more than 45 per cent in this group had at least one overnight trip.

Section B shows the average number of overnight trips for all participants in each activity, as well as the total number of overnight trips. The activities with the largest number of overnight trips come under the categories of other trips to the beach/seaside and swimming in the sea, where an estimated 470,000 and 201,000 overnight trips were generated respectively by these two activities. Sailing at sea accounted for over 82,000 overnights. At the opposite end of the scale, it can be seen that participation in certain watersports, such as water/jet skiing is more inclined to be on a day trip basis. The highest average number of overnight trips was in respect of scuba diving/snorkelling, where each participant made an average of 2.8 overnight trips.

Section C of the table provides an estimate of the total number of overnights spent on each activity and details on the average length of overnight trip. More than 1.23 million overnights were generated by trips to the beach/seaside, with a further 478,600 overnights trips involving swimming in the sea. Specialist activities such as bird watching and surfing/sailboarding demonstrated the highest average length of trip.

Table 4.2: Average number of adults and children per trip.

Average number of adults and children per trip		
Activity	Average No. of Adults in party	Average No. of children in party
ANGLING		
Freshwater Angling for coarse fish	3.5	1.3
Freshwater Angling for game fish	3.5	0.4
Sea Angling from the shore	3.6	0.9
Sea Angling from boat	6.4	0.6
COASTAL & INLAND BOATING		
Sailing at sea	4.3	0.3
Boating at sea in row boats, canoes etc.	3.5	0.8
Boating in power boats etc. at sea	5.5	0.3
Cruising/boating on inland waterways	3.3	0.2
WATERSPORTS		
Water Skiing, Jet Skiing	3.0	0.0
Surfing, Sail boarding	2.4	0.8
Scuba Diving, Snorkelling	6.0	0.8
Other Sea Sports	3.3	0.0
SEASIDE/RESORT TRIPS		
Swimming in the sea	2.7	1.5
Whale/Dolphin Watching	2.0	1.6
Bird Watching in coastal areas	3.8	0.8
Visiting Nature Reserves etc. in coastal areas	3.2	1.0
Other trips to the beach or seaside	2.6	1.1
Other trips to the islands	3.1	0.3

In general, party size is higher for activities involving some boating activity and the proportion of children in the typical party is highest for swimming in the sea.

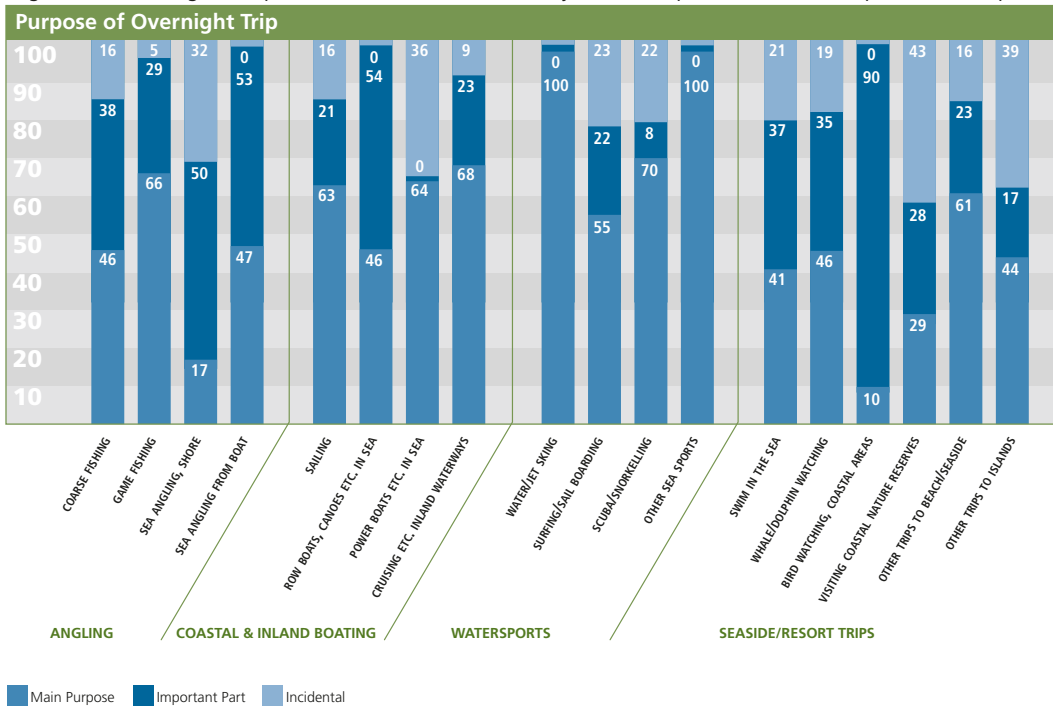
Overnight Trips

Table 4.3: Estimated number and characteristics of overnight trips.

Marine Activity	Section A		Section B		Section C	
	Total Participants	Participants who report at least one overnight trip	Average no. of overnight trips	Est. total no. of overnight trips	Average length of overnight trips	Est. total no. of overnight trips
	000's	000's	No.	000's	No.	000's
ANGLING						
Freshwater Angling for coarse fish	66.5	12.0	0.5	30.7	2.3	72.0
Freshwater Angling for game fish	80.5	17.3	0.5	42.3	3.5	148.1
Sea Angling from the shore	74.1	7.6	0.3	19.0	2.5	47.2
Sea Angling from boat	53.0	9.0	0.4	20.3	1.6	31.6
COASTAL & INLAND BOATING						
Sailing at sea	58.8	13.1	1.4	82.5	1.8	149.7
Boating at sea in row boats, canoes etc.	32.1	5.8	0.3	9.3	2.4	22.5
Boating in power boats etc. at sea	24.6	8.9	1.1	26.4	1.9	50.5
Cruising/boating on inland waterways	42.8	13.2	0.7	30.3	2.0	59.5
WATERSPORTS						
Water Skiing, Jet Skiing	19.2	0.8	0.1	1.7	2.0	3.3
Surfing, Sail boarding	17.8	1.7	0.4	7.3	5.1	37.2
Scuba Diving, Snorkelling	9.1	4.1	2.8	25.7	1.9	48.0
Other Sea Sports	7.3	1.1	0.3	2.3	2.0	4.6
SEASIDE/RESORT TRIPS						
Swimming in the sea	353.5	54.8	0.6	201.2	2.4	478.6
Whale/Dolphin Watching	9.6	3.3	0.6	5.4	1.6	8.3
Bird Watching in coastal areas	12.4	1.7	0.3	3.2	5.4	17.2
Visiting Nature Reserves etc. in coastal areas	43.5	6.6	0.2	9.2	2.5	22.7
Other trips to the beach or seaside	1,134.6	132.5	0.4	469.9	2.6	1,235.1
Other trips to the islands	33.2	19.0	0.7	21.6	2.4	51.0
Total	1,475.8			1,008.3		2,487.1

Purpose of Overnight Trip

Figure 4.1: Percentage of respondents who consider the activity as main; important or incidental part of their trip.



In order to assess the importance of water-based activities in the context of overnight trips, respondents were asked if the activity could be considered as the ‘main purpose’ of their trip; an ‘important’ part of their trip or just ‘incidental’ to their trip. Figure 4.1 shows that with activities such as water skiing/jet skiing and other sea sports the marine activity is almost always the sole purpose of the trip. In the case of other activities such as scuba diving/snorkelling; other trips to the beach or seaside; cruising on inland waterways; boating at sea; swimming in the sea and freshwater game fishing, the marine activity is a very important aspect of the trip. In each case it is cited by over two-thirds of participants as the most important or main purpose of the trip. Visiting nature reserves and nature watching are considered incidental to the trip.

Comparison 2003 and 1996

Table 4.4 provides comparable details (where available) for overnight trips for all categories of water-based leisure activities from the 1996 survey. In general, the relative trend for the number of overnight trips across marine activities has remained largely constant over the period 1996 - 2003. However, this trend is not reflected in the total number of overnights spent on marine leisure activity. In this case the greatest change has been in respect of swimming in the sea, where there was a substantial reduction in the total number of overnights recorded.

Table 4.4: Overnight Trips for each leisure activity 2003 and 1996

Activity	2003		1996	
	Est. total No. of O'night Trips (000's)	Est. total No. of O'nights (000's)	Est. total No. of O'night Trips (000's)	Est. total No. of O'nights (000's)
ANGLING				
Freshwater Angling for coarse fish	30.7	72.0	33.1	92.7
Freshwater Angling for game fish	42.3	148.1	22.9	112.2
Sea Angling from the shore	19.0	47.2	32.2	115.9
Sea Angling from boat	20.3	31.6	13.7	94.5
COASTAL & INLAND BOATING				
Sailing at sea	82.5	149.7	54.9	181.2
Boating at sea in row boats, canoes etc.	9.3	22.5	*	*
Boating in power boats etc. at sea	26.4	50.5	*	*
Cruising/boating on inland waterways	30.3	59.5	42.1	160.0
WATERSPORTS				
Water Skiing, Jet Skiing	1.7	3.3	*	*
Surfing, Sail boarding	7.3	37.2	*	*
Scuba Diving, Snorkelling	25.7	48.0	*	*
Other Sea Sports	2.3	4.6	*	*
SEASIDE/RESORT TRIPS				
Swimming in the sea	201.2	478.6	269.4	1,347.0
Whale/Dolphin Watching	5.4	8.3	11.1	41.1
Bird Watching in coastal areas	3.2	17.2	6.2	17.4
Visiting Nature Reserves etc. in coastal areas	9.2	22.7	25.4	53.3
Other trips to the beach or seaside	469.9	1,235.1	628.7	3,206.4
Other trips to the islands	21.6	51.0	*	*
Total	1,008.3	2,487.1	1,279.1	5,799.2

*Comparable figures not available from 1996 survey.

5 Expenditure Patterns

Introduction

Information on several aspects of expenditure was collected in the course of the survey. We asked respondents how much they spent on equipment; on day trips and on overnight trips. The latter was broken down into the cost of accommodation and meals, travel, and “other purchases” on overnight trips. As well as the recall issues referred to at the beginning of section 4, respondents’ answers in relation to expenditure are also subject to their ability to estimate average costs accurately. Expenditure estimates presented in this section are liable to errors caused by these difficulties.

This section analyses expenditure on overnight trips, on equipment and day trips and provides a regional breakdown of expenditure. An estimate of direct and indirect employment generated by expenditure on marine leisure activities is also determined. We begin by considering expenditure on overnight trips related to the marine leisure activity. The results are presented in Tables 5.1 and 5.2.

Average Expenditure on Overnight Trips

Details of the average expenditure per overnight trip, averaged over the number of adults in the party, show that expenditure on accommodation ranged, for example, from €20 for water/jet skiing activity to €400 for surfing/sail boarding activity. One can see that the average spend by anglers on accommodation was low when compared to those engaged in any sailing/boating activity. Expenditure on travel was evenly distributed across all activities except for scuba diving/snorkelling. In terms of the total average spend per overnight, there is a substantial variation in expenditure from a low of €43 per capita for other sea sports, to just over €628 for the very specialist activities of surfing/sail boarding. Activities characterised as having high average expenditure levels include surfing/sail boarding; swimming in the sea; boating in general; bird watching and other trips to the beach or islands. Many of these activities may of course have been undertaken as part of a larger package or holiday trip.

Table 5.1: Annual average expenditure per participant during overnight trips on accommodation & meals, travel and other.

Activity	Average € per person per annum			
	Accommodation €	Travel €	'Other' €	Total €
ANGLING				
Freshwater Angling for coarse fish	36	39	12	87
Freshwater Angling for game fish	70	32	13	116
Sea Angling from the shore	80	14	24	118
Sea Angling from boat	40	10	13	62
COASTAL/INLAND BOATING				
Sailing at sea	128	10	11	148
Boating at sea in row boats, canoes etc.	244	28	33	304
Boating in power boats etc. at sea	62	12	0	74
Cruising/boating on inland waterways	152	17	42	211
WATERSPORTS				
Water Skiing, Jet Skiing	20	13	17	50
Surfing, Sail boarding	400	91	137	628
Scuba Diving, Snorkelling	107	19	11	137
Other Sea Sports	20	7	17	43
SEASIDE/RESORT TRIPS				
Swimming in the sea	247	29	37	312
Whale/Dolphin Watching	111	19	24	155
Bird Watching in coastal areas	184	14	66	264
Visiting Nature Reserves etc. in coastal areas	143	21	16	180
Other trips to the beach or seaside	163	25	59	247
Other trips to the islands	100	25	34	159

Total Expenditure on Overnight Trips

As shown in Table 5.2, the total expenditure on overnight trips was €228.7 million, with more than 70 per cent of this amount being spent on accommodation. The major contributors to this total expenditure were activities such as generic 'other trips to the beach or seaside' (€116.2m); swimming in the sea (€62.9m) and sailing at sea (€12.3m).

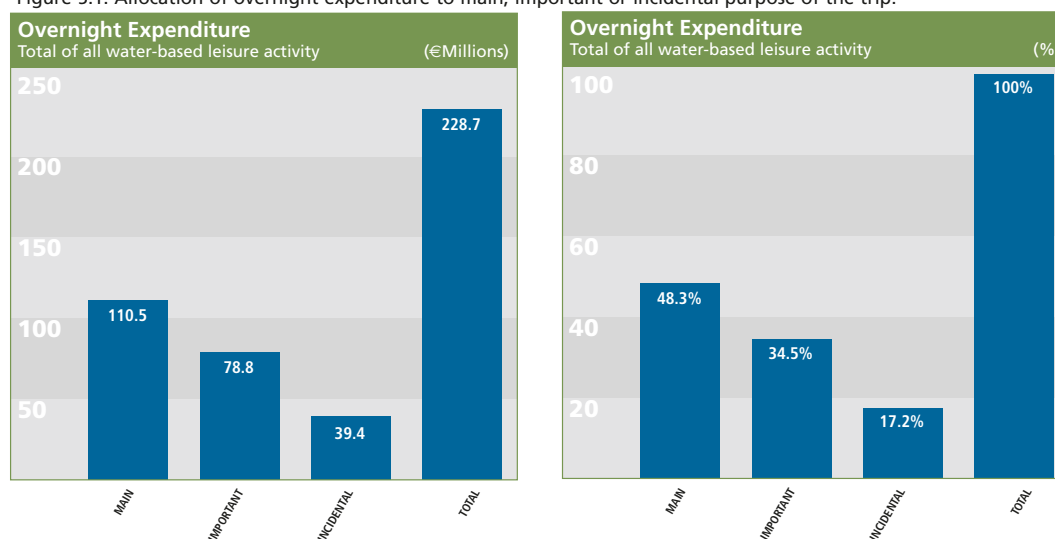
Table 5.2: Estimated total annual national expenditure during overnight trips on accommodation & meals, travel and other.

Activity	Accommodation €Ms	Travel €Ms	'Other' €Ms	Total €Ms
ANGLING				
Freshwater Angling for coarse fish	1.1	1.2	0.4	2.7
Freshwater Angling for game fish	3.0	1.4	0.6	4.9
Sea Angling from the shore	1.5	0.3	0.5	2.2
Sea Angling from boat	0.8	0.2	0.3	1.3
COASTAL & INLAND BOATING				
Sailing at sea	10.6	0.8	0.9	12.3
Boating at sea in row boats, canoes etc.	2.3	0.3	0.3	2.8
Boating in power boats etc. at sea	1.6	0.3	0.0	2.0
Cruising/boating on inland waterways	4.6	0.5	1.3	6.4
WATERSPORTS				
Water Skiing, Jet Skiing	0.0	0.0	0.0	0.1
Surfing, Sail boarding	2.9	0.7	1.0	4.6
Scuba Diving, Snorkelling	2.8	0.5	0.3	3.5
Other Sea Sports	0.0	0.0	0.0	0.1
SEASIDE/RESORT TRIPS				
Swimming in the sea	49.7	5.8	7.4	62.9
Whale/Dolphin Watching	0.6	0.1	0.1	0.8
Bird Watching in coastal areas	0.6	0.0	0.2	0.8
Visiting Nature Reserves etc. in coastal areas	1.3	0.2	0.1	1.7
Other trips to the beach or seaside	76.8	11.6	27.8	116.2
Other trips to the islands	2.2	0.5	0.7	3.4
Total	162.4	24.4	41.9	228.7

Purpose of Overnight Trip

An important aspect of overnight expenditure is the extent to which the trip in question is the sole or principal purpose of the trip; an important but not the sole purpose; or an incidental purpose. The extent to which spending on overnight trips falls into each of these categories will determine the generative economic impact of the expenditure in question. For example, if the expenditure on marine-based activities was simply 'incidental' to the trip, the generative impact would be more muted than in cases where the trip was a 'main' or 'important' aspect. In such cases, participation in the marine leisure activity could be claimed to be 'responsible' for the spending and resulting economic spin-off, in contrast to situations in which it was only of secondary or incidental importance. In the course of the survey, respondents were asked to classify their overnight trips in terms of the activity being 'the main purpose of the trip'; 'an important part of the trip' and 'just incidental to the trip'. The allocation of overnight expenditure to these three categories is outlined in Figure 5.1 below (Table A5.1, Appendix B).

Figure 5.1: Allocation of overnight expenditure to main, important or incidental purpose of the trip.



Just over 48 per cent of overnight expenditure related to trips for which the activity was the ‘main purpose’ of the trip in question and only 17 per cent related to trips for which the activity was an ‘incidental’ component. The economic relevance of this is discussed further on page 24, Employment Generated by Expenditure on Marine Leisure Activities.

Expenditure on Equipment and Daytrips

The average expenditure on equipment (Table 5.3) used in the various activities is highest in relation to some of the watersports activities which generally require specialist equipment, e.g. water/jet skiing (€685) and scuba diving/snorkelling (€553). Expenditure on activities which do not require specialist equipment was clearly much lower, e.g. the average equipment expenditure on bird watching was only €0.70 and expenditure on trips to the beach/seaside was just over €10 per capita. The average expenditure by anglers varied from over €86 for sea angling by boat to €119.60 for fresh water game angling, while average expenditure on boating varied from €19 for non-powered craft boating activity to €159 for sailing activity.

The average per capita expenditure on day trips also reflected the specialist nature of the activities, ranging from a low of €4.50 for bird watching to a high of €234.70 in respect of water skiing/jet skiing. There was considerable variation in the average expenditure across the different categories of activity types. For example, the average expenditure on angling ranged from €32 for coarse angling to €109.50 for sea angling by boat, and the average day trip expenditure on boating activity ranged from €52.20 for sailing at sea to €147.80 for boating on inland waterways.

Table 5.3: Average annual expenditure per participant on equipment and day trips.

Activity	Average € per person per annum	
	Equipment €	Daytrips €
ANGLING		
Freshwater Angling for coarse fish	95.8	32.0
Freshwater Angling for game fish	119.6	93.9
Sea Angling from the shore	97.9	61.3
Sea Angling from boat	86.2	109.5
COASTAL & INLAND BOATING		
Sailing at sea	159.1	52.2
Boating at sea in row boats, canoes etc.	19.1	19.7
Boating in power boats etc. at sea	27.1	55.6
Cruising/boating on inland waterways	97.0	147.8
WATERSPORTS		
Water Skiing, Jet Skiing	685.2	234.7
Surfing, Sail boarding	63.5	82.6
Scuba Diving, Snorkelling	532.7	113.0
Other Sea Sports	36.9	61.9
SEASIDE/RESORT TRIPS		
Swimming in the sea	14.4	43.9
Whale/Dolphin Watching	58.3	23.0
Bird Watching in coastal areas	0.7	4.5
Visiting Nature Reserves etc. in coastal areas	16.0	38.5
Other trips to the beach or seaside	10.1	58.1
Other trips to the islands	27.2	44.9

The estimated overall expenditure on equipment (Table 5.4) amounted to €81 million. The most important activity in terms of equipment spend was water/jet skiing (€13.2m), which reflects the highly specialist nature of this activity) and the generic category of other trips to the beach/seaside (€11.5m), which reflects the large number of participants.

Table 5.4 shows the estimated total expenditure on day trips amounted to €123.9m with the majority being generated by other trips to the beach/seaside (€66m) and swimming in the sea (€15.5m). These two activities accounted for almost two-thirds of total day trip expenditure. Total day trip expenditure on angling activity ranged from €2.1 million to €7.6 million and for boating activity from €0.6 million to €6.3 million.

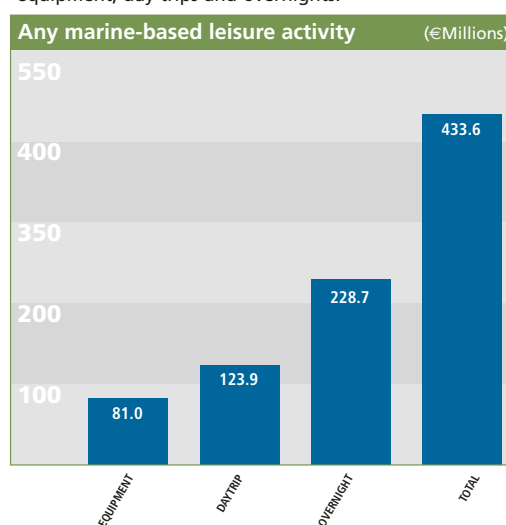
Table 5.4: Estimated total national expenditure on equipment and daytrips.

Activity	Equipment €Ms	Daytrips €Ms
ANGLING		
Freshwater Angling for coarse fish	6.4	2.1
Freshwater Angling for game fish	9.6	7.6
Sea Angling from the shore	7.2	4.5
Sea Angling from boat	4.6	5.8
COASTAL & INLAND BOATING		
Sailing at sea	9.4	3.1
Boating at sea in row boats, canoes etc.	0.6	0.6
Boating in power boats etc. at sea	0.7	1.4
Cruising/boating on inland waterways	4.2	6.3
WATERSPORTS		
Water Skiing, Jet Skiing	13.2	4.5
Surfing, Sail boarding	1.1	1.5
Scuba Diving, Snorkelling	4.9	1.0
Other Sea Sports	0.3	0.5
SEASIDE/RESORT TRIPS		
Swimming in the sea	5.1	15.5
Whale/Dolphin Watching	0.6	0.2
Bird Watching in coastal areas	0.0	0.1
Visiting Nature Reserves etc. in coastal areas	0.7	1.7
Other trips to the beach or seaside	11.5	66.0
Other trips to the islands	0.9	1.5
Total	81.0	123.9

All Expenditure

The combined total expenditure on equipment and supplies, day trips and overnight trips is estimated at €433.6 million of which €81 million relates to equipment and supplies, €123.9 million to day trips and €228.7 million to overnight trips. The highest proportions of total expenditure (Table A5.2, Appendix B) are attributable to swimming in the sea at 19.3 per cent (€83.5 million) and general trips to the beach/seaside (44.7 per cent or €193.7 million). As a per cent of total national expenditure on water-based leisure activities, all types of angling accounted for 13.6 per cent (€58.9 million), while boating/sailing activity comes to 11.4 per cent of total national expenditure on water-based leisure activities (€49.7 million).

Figure 5.2: Estimated total national expenditure on equipment, day trips and overnights.



Regional Breakdown

Table 5.5: Estimated total annual national expenditure during overnight trips, classified by region.

Activity	Border Midlands & West €Ms	South & East €Ms	Total €Ms
ANGLING			
Freshwater Angling for coarse fish	1.5	1.1	2.7
Freshwater Angling for game fish	3.7	1.2	4.9
Sea Angling from the shore	1.3	1.0	2.2
Sea Angling from boat	0.8	0.4	1.3
COASTAL & INLAND BOATING			
Sailing at sea	1.6	10.6	12.3
Boating at sea in row boats, canoes etc.	1.8	1.1	2.8
Boating in power boats etc. at sea	0.5	1.4	2.0
Cruising/boating on inland waterways	5.9	0.5	6.4
WATERSPORTS			
Water Skiing, Jet Skiing	0.1	0.0	0.1
Surfing, Sail boarding	1.8	2.8	4.6
Scuba Diving, Snorkelling	2.4	1.1	3.5
Other Sea Sports	0.1	0.0	0.1
SEASIDE/RESORT TRIPS			
Swimming in the sea	12.1	50.7	62.9
Whale/Dolphin Watching	0.4	0.4	0.8
Bird Watching in coastal areas	0.1	0.8	0.8
Visiting Nature Reserves etc. in coastal areas	0.1	1.5	1.7
Other trips to the beach or seaside	17.7	98.6	116.2
Other trips to the islands	2.0	1.4	3.4
Total	54.1	174.6	228.7

Table 5.5 provides details on a broad regional breakdown of total overnight expenditure. In aggregate terms, three-quarters of overnight spend is concentrated in the South & East regions. This concentration of expenditure is fairly consistent across almost all activities, with the exception of certain watersport activities such as scuba diving/snorkelling, and boating on inland waterways.

Changes in Expenditure on Marine Leisure (1996-2003)

Table 5.6: Comparison of total annual national expenditure on water-based leisure activities 2003 and 1996. Figures in constant 2003 prices.

Marine Activity	Equipment		Daytrips		Overnight Trips		Total Expenditure	
	2003	1996	2003	1996	2003	1996	2003	1996
	€Ms		€Ms		€Ms		Percent	
ANGLING								
Freshwater Angling for coarse fish	6.4	4.5	2.1	5.8	2.7	1.8	11.2	12.1
Freshwater Angling for game fish	9.6	9.1	7.6	6.0	4.9	1.5	22.1	16.6
Sea Angling from the shore	7.3	4.0	4.5	4.4	2.2	0.8	14.0	9.2
Sea Angling from boat	4.6	2.3	5.8	2.0	1.3	1.1	11.7	5.4
COASTAL & INLAND BOATING								
Sailing at sea	9.4	7.9	3.1	8.0	12.3	2.5	24.8	18.4
Boating at sea	1.3	18.1	2.0	7.6	4.8	5.3	8.1	31.0
Cruising/boating on inland waterways	4.2	3.9	6.3	3.7	6.4	12.9	16.9	20.5
WATERSPORTS	19.4	6.1	7.5	2.1	8.3	5.7	35.2	13.9
SEASIDE/RESORT TRIPS								
Swimming in the sea	5.1	4.5	15.5	40.6	62.9	40.4	83.5	85.5
Whale/Dolphin Watching	0.6	0.0	0.2	1.6	0.8	3.2	1.6	4.8
Bird Watching in coastal areas	0.0	0.1	0.1	0.8	0.8	0.3	0.9	1.2
Visiting Nature Reserves etc. in coastal areas	0.7	1.1	1.7	3.2	1.7	4.4	4.1	8.7
Other trips to the beach, seaside or islands	12.4	16.1	67.5	100.0	119.6	141.5	199.5	257.6
Total	81.0	77.7	123.9	185.8	228.7	221.3	433.6	484.8
							100.0	100.0

Notes: Figures for boating, watersports and other trips to the beach, seaside or islands in respect of 2003 are based on an aggregation of individual items recorded on the 2003 survey. These have been aggregated in the above table to allow comparability with 1996.

Changes in Expenditure on Marine Leisure (1996-2003)

Table 5.6 provides a comparison of expenditure on marine leisure activities in 1996 and 2003. Expenditure in the earlier survey was, of course, calculated in IR£. Since 1996 we have experienced not only a move to the Euro but have also experienced consumer price inflation. To allow a direct comparison of the expenditure for the two years we have adjusted the results from the 1996 survey to convert to Euros and also adjusted to take account of trends in consumer price inflation (CPI) over the period 1996-2003. Accordingly the amounts shown in Table 5.6 are in Euro in so-called “real” 2003 prices. These results indicate there has been a slight reduction in estimated total national expenditure from €485m in 1996 to €434m in 2003. Although expenditure on equipment and overnight trips has remained largely constant over the period, spending on day trips appears to have fallen by the order of just under €62m. (This is attributable to a fall-off in swimming in the sea and also in general trips to the beach/seaside). However, the percentage breakdown of total expenditure across the various activities has changed relatively little over the period 1996-2003.

Employment Generated by Expenditure on Marine Leisure Activities

An important aspect of the expenditure figures outlined above is the extent to which they can be translated into an estimate of the total employment generated or supported by marine leisure activity. Expenditure stimulates demand for labour in the production of the goods and services consumed by persons participating in the activities under consideration. The suppliers of the participants in marine leisure are the direct recipients of the expenditure. These are the operators of hotels, restaurants, boat hire, etc. Their employment is directly supported by the expenditure on marine activities. In addition to these jobs which are directly generated, there is a level of secondary employment arising from the suppliers to the operators of marine leisure activities themselves. These secondary or indirect jobs generated and supported by marine leisure expenditure would include the farmer who supplies the hotel or restaurant with produce, or the manufacturers of engine components who supplies the boat hire operator with engine parts, etc. In assessing the overall impact of expenditure we have taken into account both direct and indirect or secondary employment and related effects.

Input-output analysis provides a methodology for assessing these primary and secondary effects of expenditure. The most important source of input-output multipliers include Henry (1993); Henry and Deane (1997) and Henry and Deane (2002), the latter cited in a TTC report to Bord Fáilte in 2002. In their estimates of employment impacts from domestic tourism in 2000, as outlined in TTC (2002), Henry and Deane base their figures on input-output multipliers for domestic tourism as shown below in Table 5.7.

Table 5.7: Estimated employment and GNP multipliers based on Henry and Deane in TTC (2002)*

	Employment Multipliers		
	Inflation Rate	Direct	Direct + Indirect
2000	5.5	10.8	17.3
2001	4.8	10.3	16.5
2002	4.5	9.9	15.8
2003	3.2	9.6	15.3

*In making these adjustments the authors would point out that no attempt has been made to incorporate changes in either sectoral productivity or, more importantly, import content over the period 2000 (base year of estimation of multipliers) to 2003.

This table shows that the direct employment multiplier in 2000 was cited as 10.8 jobs per € million spent on domestic tourism. The direct plus indirect employment effects were estimated to be 17.3 jobs per € million of domestic tourism. If one adjusts for consumer price inflation over the period 2000 to 2003, one can see that the CPI-adjusted multiplier for direct employment effects in 2003 is in the order of 9.6 jobs per € million of domestic tourism expenditure, while the direct plus indirect employment multiplier is 15.3 per million Euro spent.

In Table 5.8 we present estimates of direct and also direct plus indirect employment supported by expenditure on domestically generated marine-based leisure activity in 2003. In Columns A, B and C we summarise total expenditure on overnight trips, on equipment purchases and also on day-trips. These figures include only overnight expenditure which can be classified as arising from a trip in which the marine activity was described as being the 'main' or an 'important' purpose of the original trip. Expenditure arising from overnights on which the expenditure on marine leisure was 'incidental' is excluded from these calculations.

In Columns D, E and F we outline the estimated level of direct employment generated by marine-based activities. This is based on the CPI-adjusted multiplier from Henry and Deane in TCC (2002) i.e. 9.6 jobs per €Million expenditure. Employment arising from expenditure on overnight trips, equipment sales and day-trips are broken out separately in Columns D, E, F and G respectively.² On this basis the total direct employment supported by all forms of marine-based leisure expenditure in 2003 is of the order of 3,760 jobs. Columns H to K summarise total direct plus indirect employment arising. When this broader and more inclusive concept is used the total number of jobs supported increases to just over 6,000 (Column K).

In deriving the employment estimates above we excluded from our calculations overnight expenditure which was attributable to the residual 'other trip' category implying that it did not constitute either a trip which was 'mainly' related to the expenditure or to one in which the marine activity was an 'important' component. The elimination of this residual category of overnight expenditure is justified on the grounds that the trip would have probably taken place anyway, even in the absence of the marine activity. In this respect the marine activity cannot be said to have been a main driver of the expenditure in question. By the same principle, one could call into question some of the employment generated by the day-trip activity. In day trip activity it is quite possible that not all of the expenditure is marginal in the sense that it is additional or in excess of what would have been otherwise spent (albeit, perhaps, in other sectors on other activities) even in the absence of the marine activity. In other words, some of the expenditure on daytrips may represent displacement of expenditure which would have taken place anyway – displacement from other purchases, from other sectors of economic activity. In this sense it could be argued that the expenditure is not as wholly generative as would otherwise be the case and so one should accordingly discount some of the employment supported by the activity on this basis. There is, unfortunately, no way of assessing the displacement effects of daytrip activity in the marine leisure sector. No estimates of displacement ratios are available. If one takes a fairly conservative 50 per cent as a displacement ratio³ one can derive a more conservative set of estimates of employment supported by expenditure. Table 5.9 summarises direct employment arising using an arbitrary 50 per cent displacement ratio for day trips is of the order of 3,200. The direct plus indirect effects are of the order of 5,100 jobs.

² The reader should note that at this point we are including total day-trip expenditure. See discussion of Table 5.10 for a slight refinement of this approach.

³ The authors point out that there are no displacement ratios available and the figure of 50 per cent used in Table 5.9 is purely arbitrary and for illustrative purposes only.

Employment Generated by Expenditure on Marine Leisure Activities

Table 5.8: Estimated direct and also direct plus indirect jobs arising from expenditure.

Activity	A		B		C		D		E		F		G		H		I		J		K	
	O'night Main + Important €Ms	Equip- ment €Ms	Equip- ment €Ms	Day Trips €Ms	Main + Imp O'night Jobs	Equip- ment Jobs	Day Trips Jobs	Total Jobs	Main + Imp O'night Jobs	Equip- ment Jobs	Day Trips Jobs	Total Jobs	Main + Imp O'night Jobs	Equip- ment Jobs	Day Trips Jobs	Total Jobs	Main + Imp O'night Jobs	Equip- ment Jobs	Day Trips Jobs	Total Jobs		
ANGLING																						
Freshwater Angling for coarse fish	2.3	6.4	2.1	2.1	22	61	20	103	36	98	33	166	36	98	33	166	36	98	33	166		
Freshwater Angling for game fish	4.7	9.6	7.6	7.6	45	92	72	210	73	148	116	336	73	148	116	336	73	148	116	336		
Sea Angling from the shore	1.6	7.2	4.5	4.5	16	69	43	128	25	111	70	206	25	111	70	206	25	111	70	206		
Sea Angling from boat	1.3	4.6	5.8	5.8	12	44	55	111	19	70	89	178	19	70	89	178	19	70	89	178		
COASTAL & INLAND BOATING																						
Sailing at sea	12.0	9.4	3.1	3.1	115	89	29	233	184	143	47	374	184	143	47	374	184	143	47	374		
Boating at sea in row boats, canoes etc.	2.8	0.6	0.6	0.6	27	6	6	39	44	9	10	63	44	9	10	63	44	9	10	63		
Boating in power boats etc. at sea	2.0	0.7	1.4	1.4	19	6	13	38	30	10	21	61	30	10	21	61	30	10	21	61		
Cruising/boating on inland waterways	5.9	4.2	6.3	6.3	56	40	61	156	90	64	97	250	90	64	97	250	90	64	97	250		
WATERSPORTS																						
Water Skiing, Jet Skiing	0.1	13.2	4.5	4.5	1	126	43	170	1	202	69	272	1	202	69	272	1	202	69	272		
Surfing, Sail boarding	4.6	1.1	1.5	1.5	44	11	14	69	71	17	22	110	71	17	22	110	71	17	22	110		
Scuba Diving, Snorkelling	3.5	4.9	1.0	1.0	34	46	10	90	54	74	16	144	54	74	16	144	54	74	16	144		
Other Sea Sports	0.1	0.3	0.5	0.5	1	3	4	8	2	4	7	13	2	4	7	13	2	4	7	13		
SEASIDE/RESORT TRIPS																						
Swimming in the sea	50.7	5.1	15.5	15.5	485	49	148	682	777	78	238	1,093	777	78	238	1,093	777	78	238	1,093		
Whale/Dolphin Watching	0.7	0.6	0.2	0.2	6	5	2	14	10	9	3	22	10	9	3	22	10	9	3	22		
Bird Watching in coastal areas	0.8	0.0	0.1	0.1	8	0	1	9	13	0	1	14	13	0	1	14	13	0	1	14		
Visiting Nature Reserves etc. in coastal areas	1.4	0.7	1.7	1.7	13	7	16	36	21	11	26	57	21	11	26	57	21	11	26	57		
Other trips to the beach or seaside	91.8	11.5	66.0	66.0	877	110	630	1,618	1,406	176	1,010	2,593	1,406	176	1,010	2,593	1,406	176	1,010	2,593		
Other trips to the islands	3.0	0.9	1.5	1.5	29	9	14	51	46	14	23	83	46	14	23	83	46	14	23	83		
Total	189.3	81.0	123.9	123.9	1,809	772	1,183	3,764	2,900	1,238	1,896	6,034	2,900	1,238	1,896	6,034	2,900	1,238	1,896	6,034		

Employment Generated by Expenditure on Marine Leisure Activities

Table 5.9: Estimated direct and also direct plus indirect jobs arising from expenditure using a 50% displacement ratio for daytrip expenditure of 50 per cent.*

	Direct Employment Supported Assume 50 per cent displacement in day trips				Direct Plus Indirect Employment Supported Assume 50 per cent displacement in day trips			
	Jobs Main+Imp O'night	Jobs Equipment	Jobs Day Trips	Jobs Total	Jobs Main+Imp O'night	Jobs Equipment	Jobs Day Trips	Jobs Total
ANGLING								
Freshwater Angling for coarse fish	22	61	10	93	36	98	16	149
Freshwater Angling for game fish	45	92	36	173	73	148	58	278
Sea Angling from the shore	16	69	22	107	25	111	35	171
Sea Angling from boat	12	44	28	83	19	70	44	134
COASTAL & INLAND BOATING								
Sailing at sea	115	89	15	219	184	143	24	351
Boating at sea in row boats, canoes etc.	27	6	3	36	44	9	5	58
Boating in power boats etc. at sea	19	6	7	32	30	10	10	51
Cruising/boating on inland waterways	56	40	30	126	90	64	48	202
WATERSPORTS								
Water Skiing, Jet Skiing	1	126	22	148	1	202	35	237
Surfing, Sail boarding	44	11	7	62	71	17	11	99
Scuba Diving, Snorkelling	34	46	5	85	54	74	8	136
Other Sea Sports	1	3	2	6	2	4	3	9
SEASIDE/RESORT TRIPS								
Swimming in the sea	485	49	74	608	777	78	119	974
Whale/Dolphin Watching	6	5	1	13	10	9	2	21
Bird Watching in coastal areas	8	0	0	8	13	0	0	13
Visiting Nature Reserves etc. in coastal areas	13	7	8	28	21	11	13	44
Other trips to the beach or seaside	877	110	315	1,302	1,406	176	505	2,088
Other trips to the islands	29	9	7	44	46	14	11	71
Total	1,809	772	592	3,173	2,900	1,238	948	5,085

*The authors point out that there are no displacement ratios available and the figure of 50 per cent used in Table 5.9 is purely arbitrary and for illustrative purposes only.

In Table 5.10 we summarise the employment effects arising from domestic expenditure on marine-based leisure activities in 2003. The figures show that based on the most conservative set of assumptions (which include only 'main' and 'important' overnight trips plus an arbitrary 50 per cent displacement effect for day trips) direct employment supported by domestic expenditure on marine-leisure activities in 2003 was of the order of just under 3,200 jobs. Direct plus indirect employment (on the same set of assumptions) was of the order of just under 5,100 jobs.

Table 5.10: Estimates of employment generated by water-based leisure activities.

	Direct Employment	Direct + Indirect Employment
Overnight expenditure –Main + Important	1,809	2,900
Expenditure on Equipment	772	1,238
Expenditure on Day Trips (Assume no displacement effects)	1,183	1,896
Total (no displacement effects for daytrips)	3,764	6,034
Expenditure on Day Trips (Assume 50% displacement)	592	948
Total (with assumed 50% daytrip displacement)	3,173	5,085

6 Satisfaction and Evaluation

Introduction

In the course of the survey, respondents were asked to evaluate the facilities available for various activities.

Their evaluation and comments were assessed by asking:

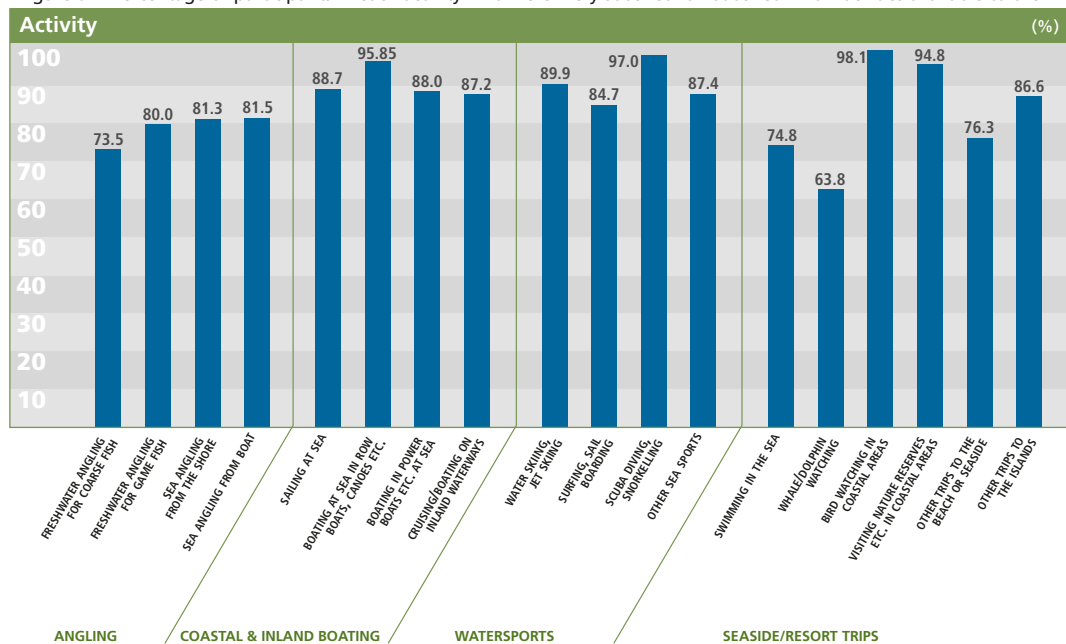
- How satisfied the participant was with the facilities for each activity they engaged in
- If they would have participated more in any activity, or would have started to participate in any of the activities, if facilities for the particular activity were better
- If they had any comments on the facilities or on the marine environment in general.

In this section we analyse each of these questions in turn.

Levels of Satisfaction

Overall, satisfaction with facilities for various activities was very high (over 70 per cent 'Satisfied' or 'Very Satisfied' in all cases). The highest levels of overall satisfaction were recorded for bird watching; scuba diving/snorkelling; visiting coastal nature reserves and boating at sea, all with levels of satisfaction over 95 per cent.

Figure 6.1: Percentage of participants in each activity who were 'Very Satisfied' or 'Satisfied' with facilities available to them.



With the exception of whale/dolphin watching (64 per cent) at least three-quarters of participants in all activities expressed themselves as being 'very satisfied' or 'satisfied' with existing facilities.

Potential Changes in Participation Levels

Respondents were asked to record whether or not they would participate more in the future if water-based leisure facilities were better. Table 6.1 below shows:

- The number of persons, engaging in leisure activities, who said they would have participated more often in each activity, had the facilities been better
- Non-participants who said they would have started participating if facilities were improved.

In interpreting the responses to these questions we would point out that stated intentions of this sort are entirely hypothetical. One cannot assume that actual future behaviour would closely mirror stated intentions in the light of assumed changes in circumstances – for example, improvements in infrastructure, etc. Notwithstanding this caveat, the figures give a good indication of attitudes and perceptions regarding each of the activities in question and potential changes in future participation in response to improvements in available facilities. The results are presented in two sections. In Section A we focus on those who already participate in each of the specific activities in question. In Section B the base is those who are currently non-participants in any marine-based activity.

Table 6.1: Number of persons who would (a) have participated more and (b) start to participate in each activity if facilities were better.*

Activity	Section A Current Participants (000's)	Section B Non-Participants (000's)
ANGLING		
Freshwater Angling for coarse fish	13.3	7.6
Freshwater Angling for game fish	13.9	6.7
Sea Angling from the shore	6.9	10.9
Sea Angling from boat	3.9	14.0
COASTAL & INLAND BOATING		
Sailing at sea	6.5	30.6
Boating at sea in row boats, canoes etc.	4.5	17.9
Boating in power boats etc. at sea	2.2	19.4
Cruising/boating on inland waterways	8.4	11.8
WATERSPORTS		
Water Skiing, Jet Skiing	4.7	32.8
Surfing, Sail boarding	2.6	23.4
Scuba Diving, Snorkelling	1.3	29.8
Other Sea Sports	0.9	3.4
SEASIDE/RESORT TRIPS		
Swimming in the sea	37.2	47.2
Whale/Dolphin Watching	0.3	4.8
Bird Watching in coastal areas	0.0	2.9
Visiting Nature Reserves etc. in coastal areas	3.2	2.7
Other trips to the beach or seaside	70.6	23.8
Other trips to the islands	4.1	4.4
Total	184.5	294.1

*Note these results show respondents' opinions and do not conclusively demonstrate actual future behaviour.

An estimated 184,500 persons who currently participate said they would have increased their participation in water-based leisure activities had the facilities been better, and 294,100 non-participants (10 per cent of the total adult population) said they would take up various activities if facilities were better.

The largest increase in participation rates, if facilities improved, was indicated for swimming in the sea (37,200 increased participation and 47,200 new participants) and trips to the beach/seaside (70,600 increased participation and 23,800 new participants). Substantial numbers also said they would take up sailing or boating at sea (almost 70,000 new participants) or water sports (89,400 new participants) if facilities improved. Within specific activities, a high percentage of respondents (an average of 18 per cent) who currently engage in freshwater angling, cruising, water skiing, jet skiing, surfing or scuba diving said that they would increase their participation if facilities were better.

Comments and Criticism

Respondents were also asked if they had any comments to make on the facilities available for the various activities or on the marine environment in general. (Respondents could comment on any activity regardless of whether or not they had participated in it.) Some respondents made positive comments praising the facilities, the highest levels of such positive comments were recorded for visiting coastal nature reserves (83 per cent); sea angling from the shore (63 per cent); cruising on inland waterways (59 per cent) and bird watching (53 per cent).

In terms of negative comments, 'pollution' was seen to be problematic, particularly among coarse anglers (27 per cent); sea swimmers (19 per cent); those on general trips to the seaside (29 per cent); game anglers (11 per cent); and snorkellers (10 per cent). 'Lack of facilities' was seen as more problematic than pollution, and was mentioned by respondents engaging in water sports such as water skiing/jet skiing (45 per cent); surfing (70 per cent); scuba diving (29 per cent) and boating, sailing and cruising activities (an average of 25 per cent). 'Poor fish stock' was mentioned in 15 per cent of comments on game and seashore angling.

Table 6.2: Comments made on facilities for different activities (Participants and Non-Participants).

Activity	No. of Persons Commenting on this Activity (000's)	Comments								
		Positive	Pollution	Lack of Facilities	Poor Access	Too Expensive	Poor Facilities for Children	Not Enough Information	Poor Fish Stock	Lack of Safety Provisions
		Per Cent of Comments on this Activity								
ANGLING										
Freshwater Angling for coarse fish	31.3	37.7	27.1	18.7	0.0	0.0	4.2	0.0	6.3	0.0
Freshwater Angling for game fish	48.4	49.7	11.2	10.2	5.1	1.8	0.0	0.0	14.6	0.0
Sea Angling from the shore	20.4	62.7	5.4	6.7	0.0	0.9	0.0	0.0	15.2	0.0
Sea Angling from boat	19.1	40.3	0.0	6.5	1.3	4.2	0.0	0.9	6.8	4.9
COASTAL & INLAND BOATING										
Sailing at sea	17.3	52.8	2.5	29.7	3.3	6.3	0.0	1.1	0.0	0.9
Boating at sea in row boats, canoes etc.	11.1	30.8	0.0	29.9	15.9	5.0	0.0	0.0	0.0	0.0
Boating in power boats etc. at sea	10.6	41.3	0.0	21.4	11.0	11.1	0.0	0.0	0.0	0.0
Cruising/boating on inland waterways	21.1	59.1	0.0	18.3	0.7	4.3	0.0	0.0	0.0	0.7
WATERSPORTS										
Water Skiing, Jet Skiing	16.1	47.9	0.0	44.5	0.0	0.0	0.0	0.0	0.0	0.0
Surfing, Sail boarding	4.0	16.9	0.0	70.7	0.0	0.0	0.0	0.0	0.0	0.0
Scuba Diving, Snorkelling	12.9	30.4	10.3	28.9	4.5	2.7	0.0	0.0	0.0	6.6
Other Sea Sports	1.7	33.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
SEASIDE/RESORT TRIPS										
Swimming in the sea	95.8	32.6	18.6	25.5	1.2	1.4	0.8	1.2	0.0	3.0
Whale/Dolphin Watching	0.2	0.0	0.0	100.0	0.0	0.0	0.0	0.0	0.0	0.0
Bird Watching in coastal areas	2.7	53.0	0.0	13.0	0.0	0.0	0.0	6.6	0.0	0.0
Visiting Nature Reserves etc. in coastal areas	6.6	83.4	3.3	0.0	0.0	0.0	0.0	13.3	0.0	0.0
Other trips to the beach or seaside	293.9	31.2	28.6	16.3	2.1	1.4	2.1	0.0	0.0	3.6
Other trips to the islands	10.3	60.6	6.0	16.2	9.2	0.0	0.0	0.0	0.0	0.0

7 Angling

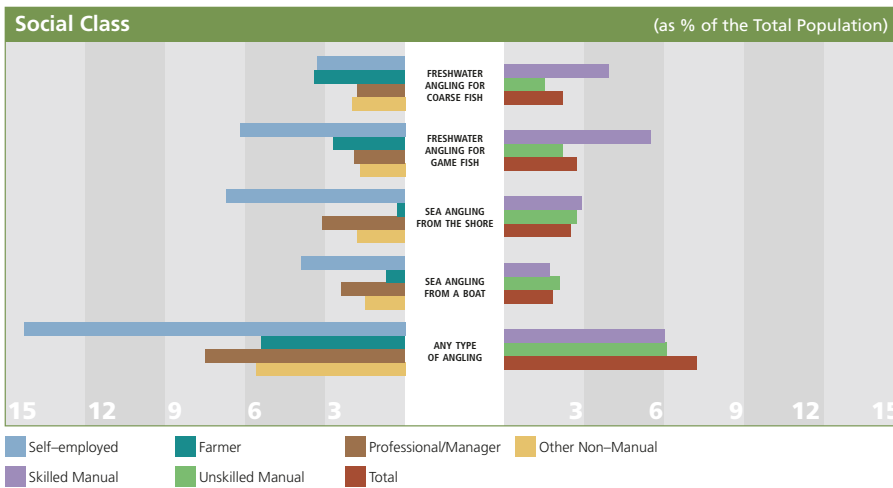
For the purpose of the survey, angling activity was categorised into four main activity types namely:

- Freshwater Angling for coarse fish (pike, bream, roach, perch, etc.)
- Freshwater Angling for game fish (trout, salmon, sea trout)
- Sea Angling from the shore
- Sea Angling from a boat

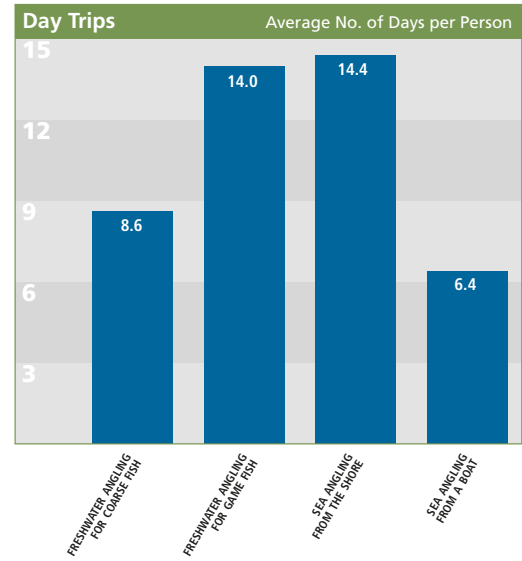
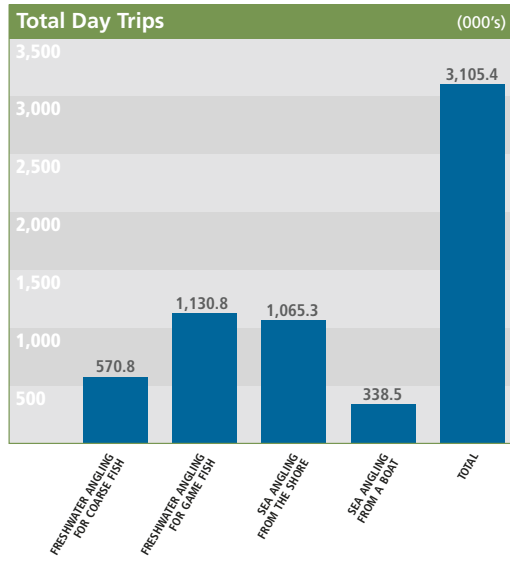
Participation Levels

Participation Levels	(000's)
Freshwater Angling for coarse fish	66.5
Freshwater Angling for game fish	80.5
Sea Angling from the shore	74.1
Sea Angling from a boat	53.0
Any type of Angling	218.0
All Adults in the population	3,013.6

Gender	(000's)	
	Male	Female
Freshwater Angling for coarse fish	49.0	17.5
Freshwater Angling for game fish	74.2	6.3
Sea Angling from the shore	62.7	11.3
Sea Angling from a boat	46.8	6.2
Any type of Angling	181.6	36.4

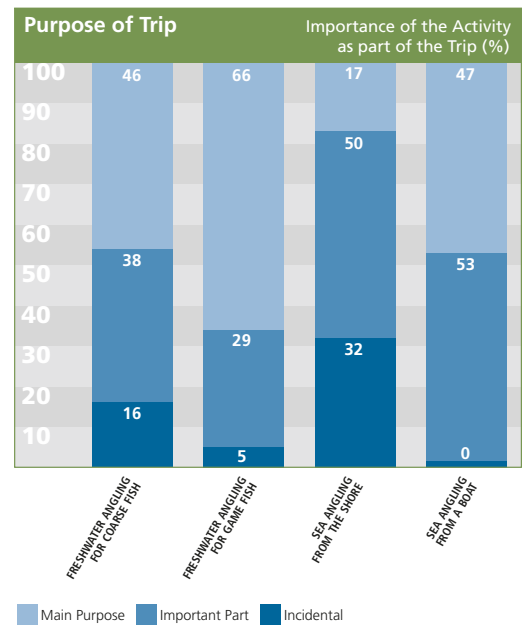
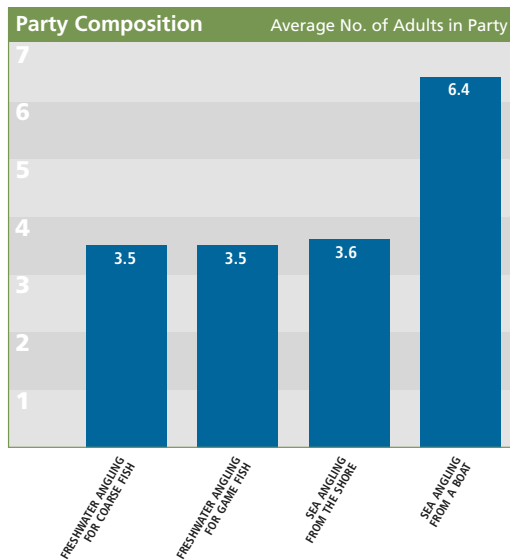


Frequency of Participation



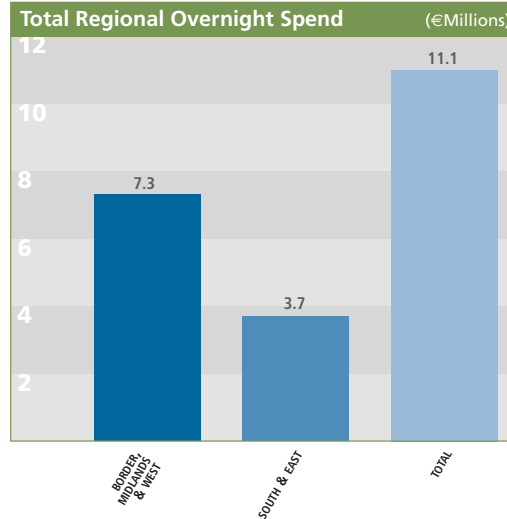
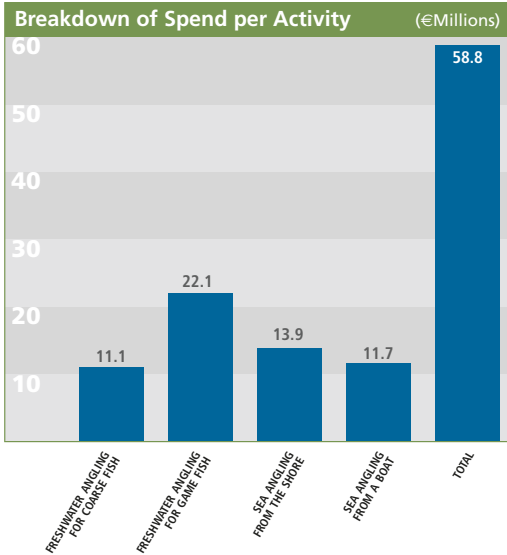
Overnight Trips

	Participants who report at least one o'night trip (000's)	Est. total no. of o'night trips (000's)	Av. length of o'night trips (No. of Days)	Est. total no. of o' nights (000's)
Freshwater Angling for coarse fish	12.0	30.7	2.3	72.0
Freshwater Angling for game fish	17.3	42.3	3.5	148.1
Sea Angling from the shore	7.6	19.0	2.5	47.2
Sea Angling from a boat	9.0	20.3	1.6	31.6
Total		112.3		298.9



Expenditure

Breakdown of Spend			(€Millions)
	Equipment	Daytrip	Overnight
Freshwater Angling for coarse fish	6.4	2.1	2.7
Freshwater Angling for game fish	9.6	7.6	4.9
Sea Angling from the shore	7.2	4.5	2.2
Sea Angling from a boat	4.6	5.8	1.3
Total	27.8	20.0	11.1



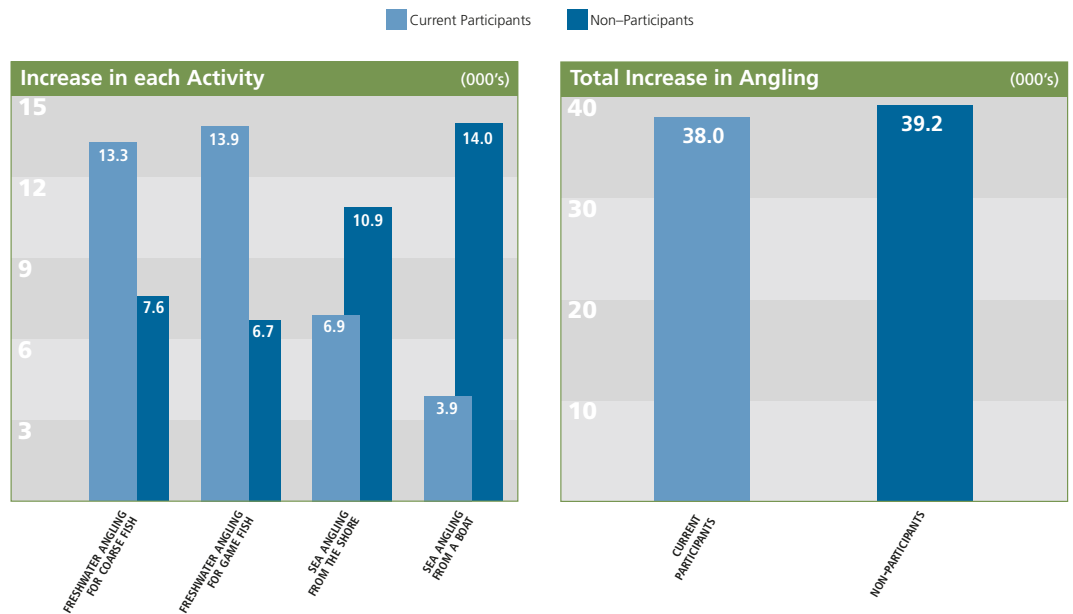
Regional Overnight Spend per Activity*			(£Millions)
	Border, Midlands & West	South & East	Total
Freshwater Angling for coarse fish	1.5	1.1	2.7
Freshwater Angling for game fish	3.7	1.2	4.9
Sea Angling from the shore	1.3	1.0	2.2
Sea Angling from a boat	0.8	0.4	1.3

*Given the relatively small sample size there will be some variance in regional figures recorded.

Employment Generated*		
	Direct Employment	Direct + Indirect Employment
Overnight expenditure – Main + Important	95	153
Expenditure on Equipment	266	427
Expenditure on Day Trips (Assume 50% displacement)	96	153
Total (With assumed 50% daytrip displacement)	457	733

*Employment Multiplier based on Henry and Deane in TTC (2002).

Potential Increase in Participation Levels if Facilities were Improved



*Note these results show respondents' opinions and do not conclusively demonstrate actual future behaviour.

8 Coastal & Inland Boating

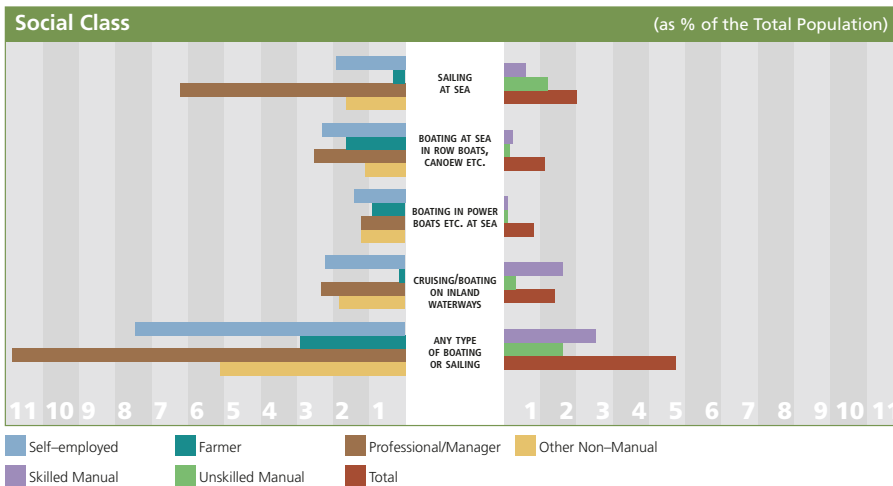
For the purpose of this survey, coastal and inland boating activity was categorised into four main activity types, namely:

- Sailing at sea
- Boating at sea in rowing boats, canoes, etc. (with or without out-board engines)
- Boating, cruising at sea in power boats, rigid inflatable boats (RIBS) or boats with in-board engine
- Cruising, boating, sailing on inland waterways

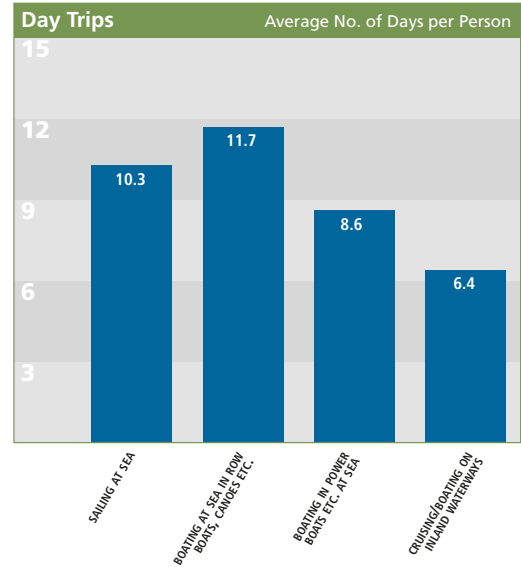
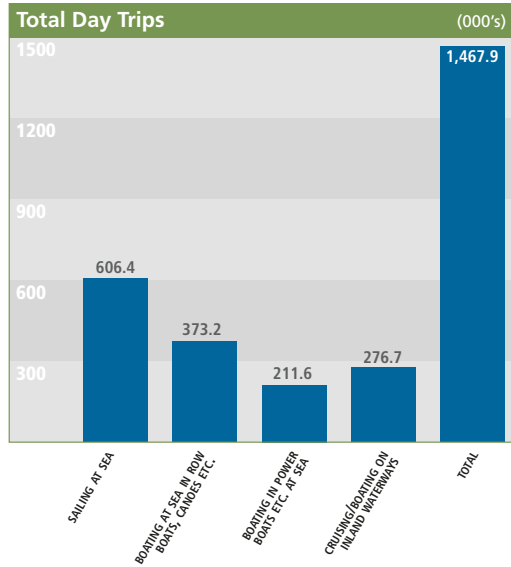
Participation Levels

Participation Levels	(000's)
Sailing at sea	58.8
Boating at sea in row boats, canoes etc.	32.1
Boating in power boats etc. at sea	24.6
Cruising/boating on inland waterways	42.8
Any type of Boating or Sailing	142.8
All Adults in the population	3,013.6

Gender	(000's)	
	Male	Female
Sailing at sea	30.5	28.4
Boating at sea in row boats, canoes etc.	15.6	16.6
Boating in power boats etc. at sea	13.8	10.8
Cruising/boating on inland waterways	30.2	12.6
Any type of Boating or Sailing	80.7	62.1

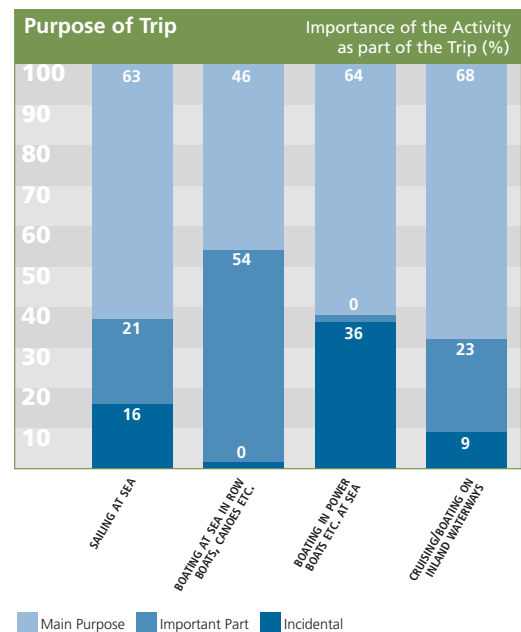
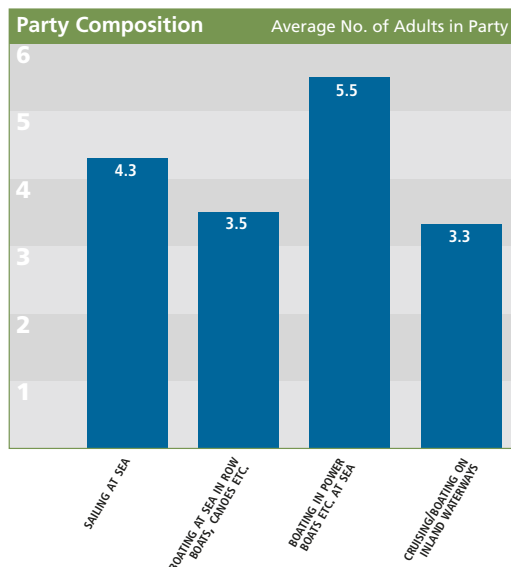


Frequency of Participation



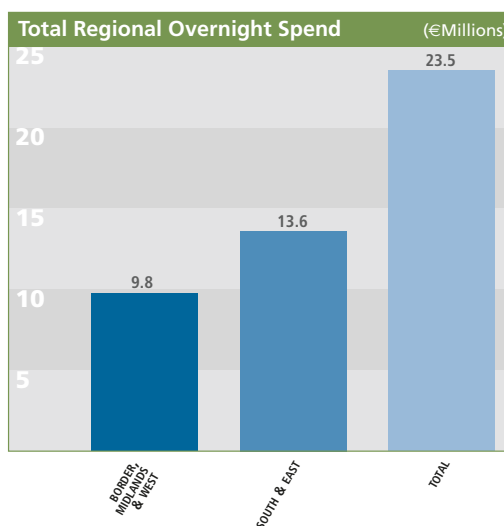
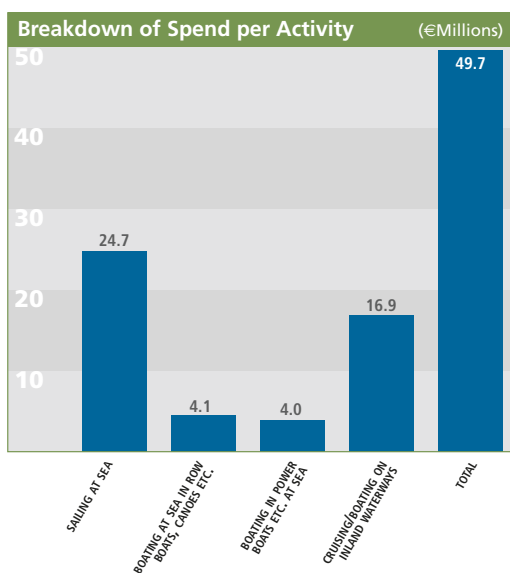
Overnight Trips

	Participants who report at least one o'night trip (000's)	Est. total no. of o'night trips (000's)	Av. length of o'night trips (No. of Days)	Est. total no. of o'nights (000's)
Sailing at sea	13.1	82.5	1.8	149.7
Boating at sea in row boats, canoes etc.	5.8	9.3	2.4	22.5
Boating in power boats etc. at sea	8.9	26.4	1.9	50.5
Cruising/boating on inland waterways	13.2	30.3	2.0	59.5
Total		148.5		282.2



Expenditure

Breakdown of Spend			(€Millions)
	Equipment	Daytrip	Overnight
Sailing at sea	9.4	3.1	12.3
Boating at sea in row boats, canoes etc.	0.6	0.6	2.8
Boating in power boats etc. at sea	0.7	1.4	2.0
Cruising/boating on inland waterways	4.2	6.3	6.4
Total	14.9	11.4	23.5



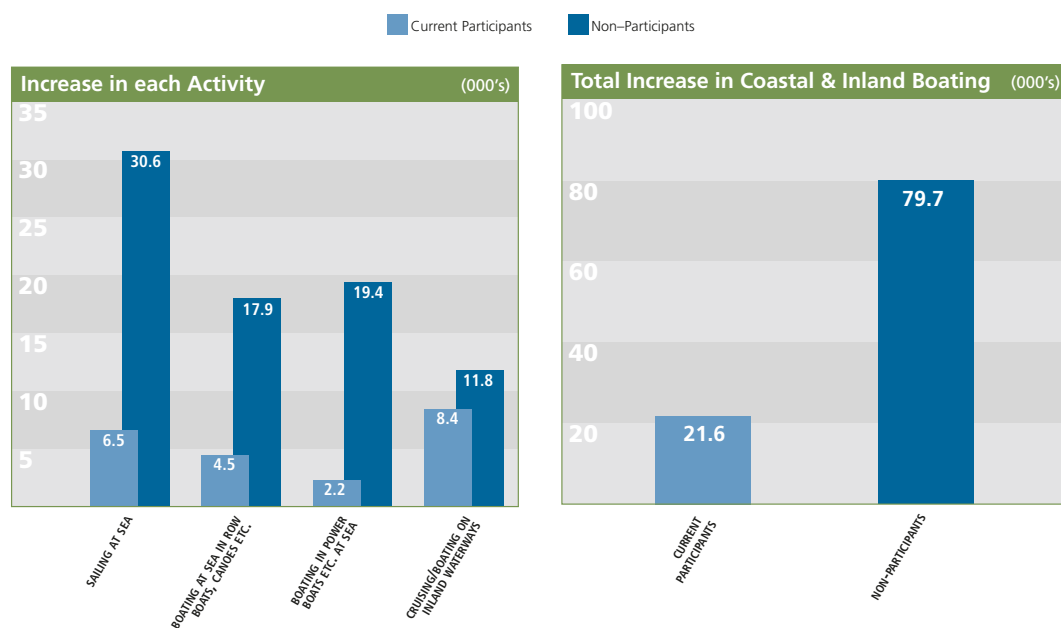
Regional Overnight Spend per Activity*			(€Millions)
	Border, Midlands & West	South & East	Total
Sailing at sea	1.6	10.6	12.3
Boating at sea in row boats, canoes etc.	1.8	1.1	2.8
Boating in power boats etc. at sea	0.5	1.4	2.0
Cruising/boating on inland waterways	5.9	0.5	6.4

*Given the relatively small sample size there will be some variance in regional figures recorded.

Employment Generated*		
	Direct Employment	Direct + Indirect Employment
Overnight expenditure –Main + Important	217	348
Expenditure on Equipment	141	226
Expenditure on Day Trips (Assume 50% displacement)	55	87
Total (with assumed 50% daytrip displacement)	413	661

*Employment Multiplier based on Henry and Deane in TTC (2002).

Potential Increase in Participation Levels if Facilities were Improved



*Note these results show respondents' opinions and do not conclusively demonstrate actual future behaviour.

Coastal and Inland Boating Characteristics

At the present time, there is no system in place in Ireland which accurately registers leisure boat ownership. As a result, there is no source of empirical data to determine levels of boat ownership or characteristics of types of boats used for various boating/sailing activities. In the course of this survey, specific questions were addressed to all respondents who engaged in any type of boating/sailing activity. The objective was to provide an estimate of the type of vessel used for each specific boating/sailing activity; and to determine levels of boat ownership among participants who go sailing/boating at sea and for those who go boating on the inland waterways.

For this purpose, participation in boating was classified according to the following activities:

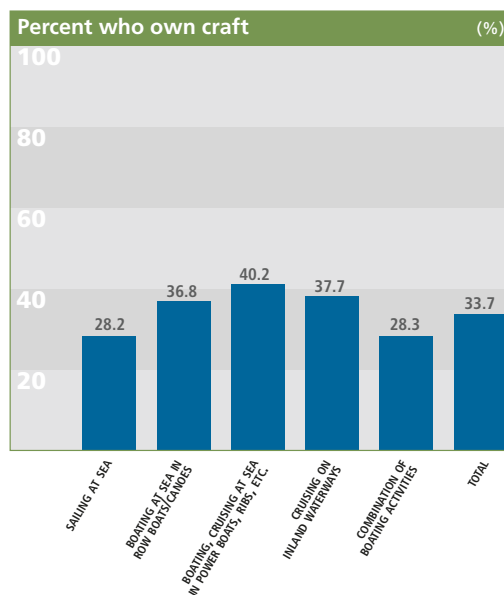
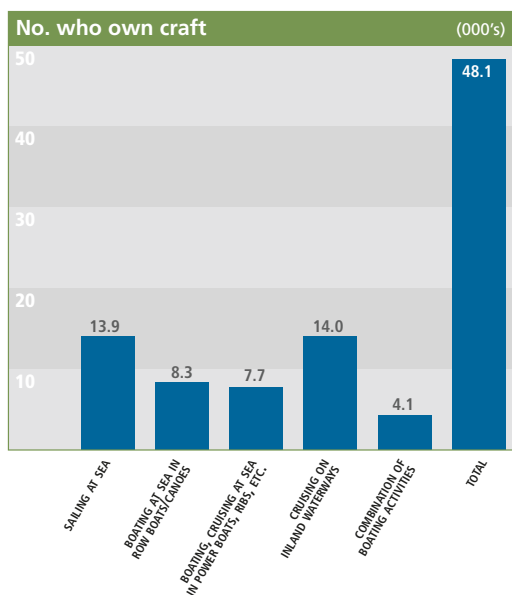
- Sailing at sea
- Boating at sea in row boats, canoes etc. (with or without out-board engine)
- Boating, cruising at sea in powerboats, rigid inflatable boats (RIBs) or boats with in-board engines
- Cruising, boating, sailing on inland waterways
- A combination of boating activities

Participation Levels	No. of Participants (000's)	%
Sailing at sea	49.5	34.6
Boating at sea in row boats, canoes etc. (with or without out-board engine)	22.6	15.8
Boating, cruising at sea in powerboats, rigid inflatable boats (RIBs) or boats with in-board engines	19.3	13.5
Cruising, boating, sailing on inland waterways	37.2	26.0
A combination of boating activities	14.4	10.0
Total	142.8	100.0

Type of Vessel used in Leisure Boating Activity*						(000's)
Type of Vessel Mainly Used	Sailing at sea	Boating at sea in row boat/canoe	Boating/cruising at sea in powerboat, RIB, etc.	Cruising inland waterways	A Combination boating activities	Total
Non powered craft	5.4	16.7	1.1	10.6	0.4	34.2
Sailing dinghy	14.8	0.4	0.0	0.4	1.8	17.3
Sailing boat, auxiliary engine	14.6	1.5	2.0	4.8	6.1	28.9
Personal watercraft	0.0	0.0	0.0	0.0	0.0	0.0
Small fast powered boat	2.5	1.2	6.6	1.4	0.9	12.6
Sports cruiser	2.5	0.0	1.3	5.7	3.1	12.7
Motor boat/sailer	6.8	2.8	4.7	9.4	2.2	25.9
RIB	0.0	0.0	2.9	0.0	0.0	2.9
Other	2.8	0.0	0.8	5.0	0.0	8.5
Total	49.5	22.6	19.3	37.2	14.4	142.8

*Although there are some privately owned personal watercraft in the country, incidence levels are relatively low and they may not register in a statistical sample survey. In statistical terms their incidence is not significantly different from zero.

Leisure Boat Ownership



Sailing/Boating at Sea			(000's)
Type of Vessel mainly used	Owned	Rented/Borrowed	Total
Non powered craft	8.0	15.0	22.9
Sailing dinghy	7.3	10.2	17.5
Sailing boat, auxiliary engine	5.8	19.0	24.8
Personal watercraft	0.0	0.0	0.0
Small fast powered boat	1.3	9.4	10.7
Sports cruiser	0.0	7.1	7.2
Motor boat/sailer	6.5	9.8	16.3
RIB	2.6	0.0	2.6
Other	2.8	0.8	3.6
Total	34.3	71.4	105.7*

*This total relates to participation levels, excluding the 37,200 who engaged exclusively in cruising on inland waterways.

Cruising on Inland Waterways			(000's)
Type of Vessel mainly used	Owned	Rented/Borrowed	Total
Non powered craft	6.1	4.5	10.6
Sailing dinghy	0.0	0.4	0.4
Sailing boat, auxiliary engine	2.1	2.6	4.8
Personal watercraft	0.0	0.0	0.0
Small fast powered boat	1.2	0.2	1.4
Sports cruiser	0.0	5.7	5.7
Motor boat/sailer	2.0	7.3	9.4
RIB	0.0	0.0	0.0
Other	2.1	2.8	4.9
Total	13.7	23.5	37.2

9 Watersports

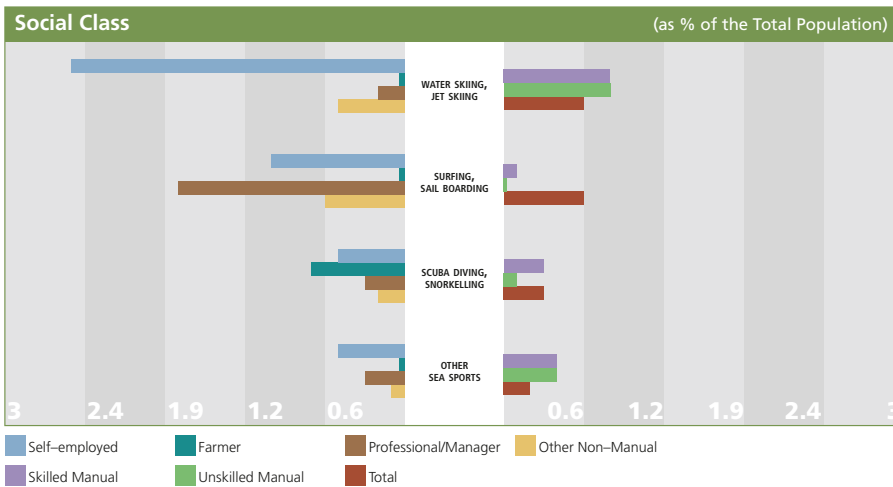
For the purpose of this survey, watersports activity was categorised into four main activity types, namely:

- Water skiing/Jet skiing
- Surfing/Sail boarding
- Scuba diving/Snorkelling
- Other Sea Sports

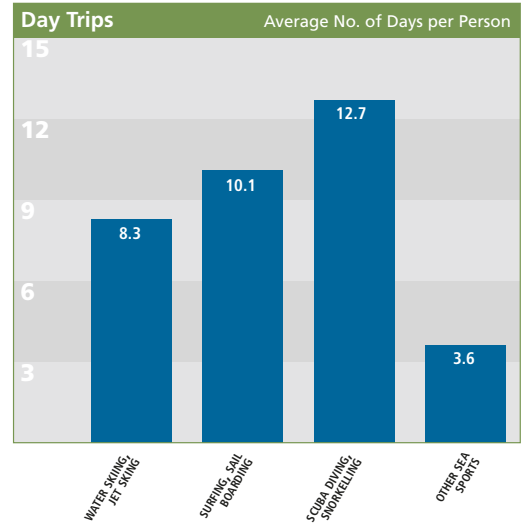
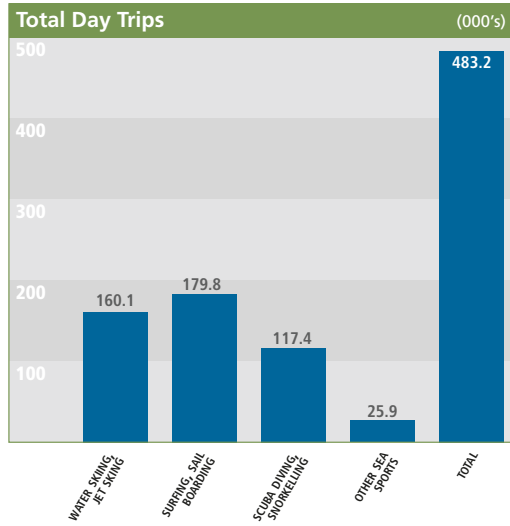
Participation Levels

Participation Levels	(000's)
Water Skiing, Jet Skiing	19.2
Surfing, Sail boarding	17.8
Scuba Diving, Snorkelling	9.1
Other Sea Sports	7.3
All Adults in the population	3,013.6

Gender	(000's)	
	Male	Female
Water Skiing, Jet Skiing	13.9	5.3
Surfing, Sail boarding	9.0	8.8
Scuba Diving, Snorkelling	6.0	3.1
Other Sea Sports	3.5	3.8

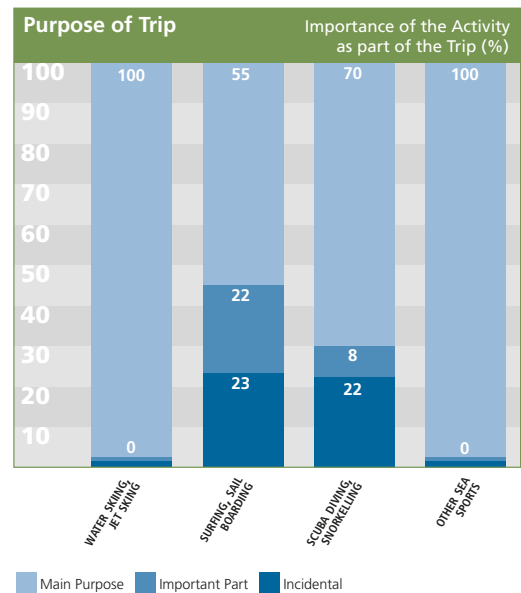
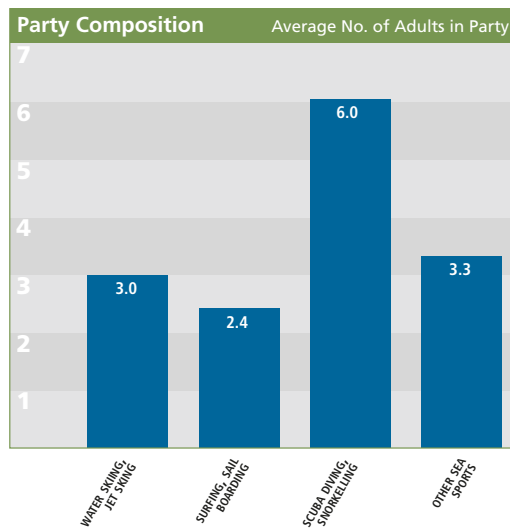


Frequency of Participation



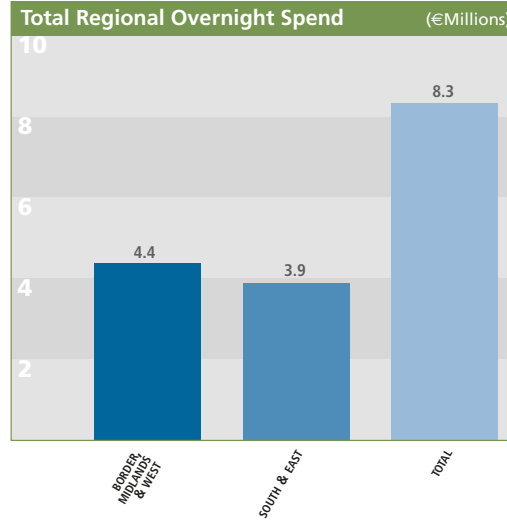
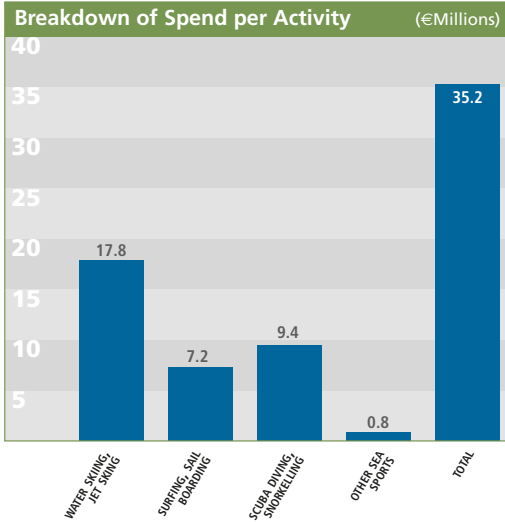
Overnight Trips

	Participants who report at least one o'night trip (000's)	Est. total no. of o'night trips (000's)	Av. length of o'night trips (No. of Days)	Est. total no. of o'nights (000's)
Water Skiing, Jet Skiing	0.8	1.7	2.0	3.3
Surfing, Sail boarding	1.7	7.3	5.1	37.2
Scuba Diving, Snorkelling	4.1	25.7	1.9	48.0
Other Sea Sports	1.1	2.3	2.0	4.6
Total		37.0		93.1



Expenditure

Breakdown of Spend			(€Millions)
	Equipment	Daytrip	Overnight
Water Skiing, Jet Skiing	13.2	4.5	0.1
Surfing, Sail boarding	1.1	1.5	4.6
Scuba Diving, Snorkelling	4.9	1.0	3.5
Other Sea Sports	0.3	0.5	0.1
Total	19.5	7.5	8.3



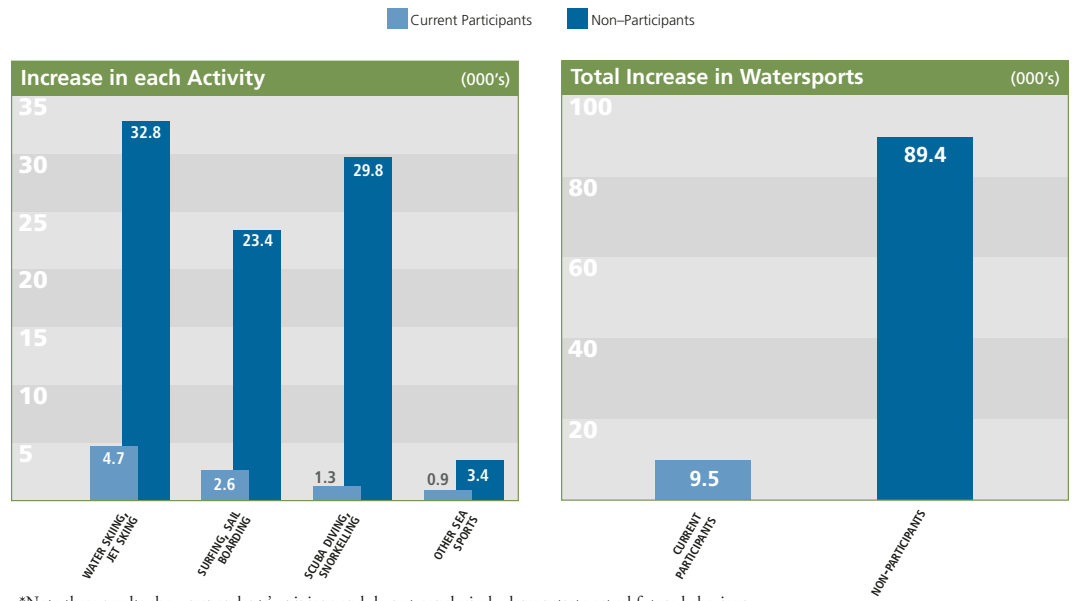
Regional Overnight Spend per Activity*			(£Millions)
	Border, Midlands & West	South & East	Total
Water Skiing, Jet Skiing	0.1	0.0	0.1
Surfing, Sail boarding	1.8	2.8	4.6
Scuba Diving, Snorkelling	2.4	1.1	3.5
Other Sea Sports	0.1	0.0	0.1

*Given the relatively small sample size there will be some variance in regional figures recorded.

Employment Generated*		
	Direct Employment	Direct + Indirect Employment
Overnight expenditure – Main + Important	80	128
Expenditure on Equipment	186	297
Expenditure on Day Trips (Assume 50% displacement)	36	57
Total (With assumed 50% daytrip displacement)	302	482

*Employment Multiplier based on Henry and Deane in TTC (2002).

Potential Increase in Participation Levels if Facilities were Improved



*Note these results show respondents' opinions and do not conclusively demonstrate actual future behaviour.

10 Seaside/Resort Trips

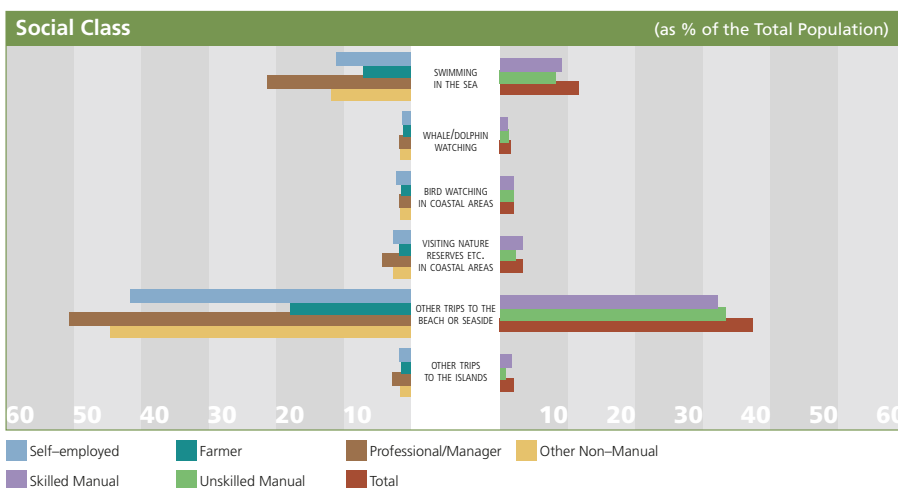
Seaside/resort trips include all trips to the seashore – possibly evening strolls by residents of coastal areas, as well as trips involving a full day by people living in areas more distant from the coast. For the purpose of this survey, Seaside/Resort trips activity was categorised into the following main activity types namely:

- Swimming in the sea
- Whale/Dolphin watching
- Bird watching in coastal areas
- Visiting nature reserves etc. in coastal areas
- Other trips to the beach or seaside
- Other trips to the islands

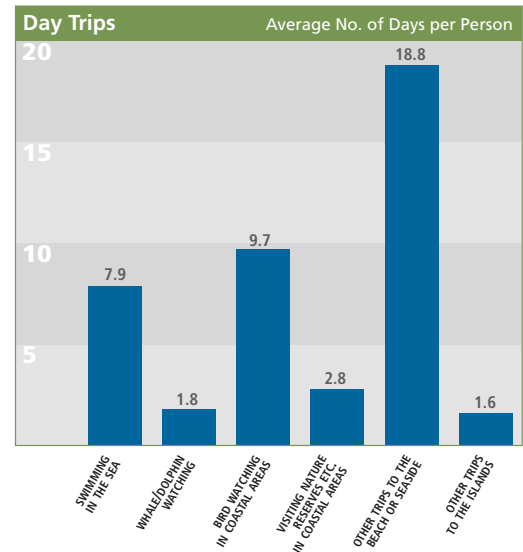
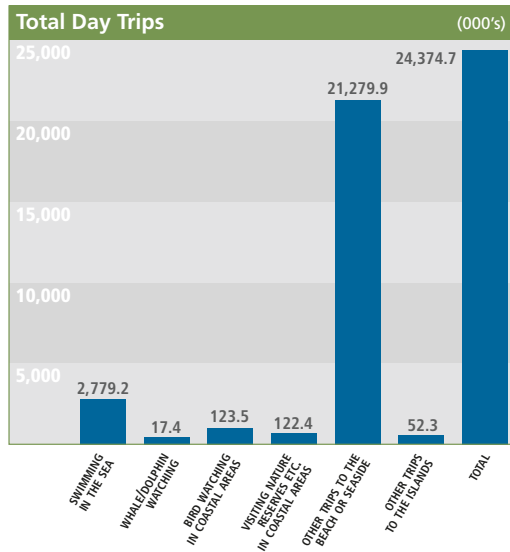
Participation Levels

Participation Levels	(000's)
Swimming in the sea	353.5
Whale/Dolphin Watching	9.6
Bird Watching in coastal areas	12.4
Visiting Nature Reserves etc. in coastal areas	43.5
Other trips to the beach or seaside	1,134.6
Other trips to the islands	33.2
All Adults in the population	3,013.6

Gender	(000's)	
	Male	Female
Swimming in the sea	164.0	189.6
Whale/Dolphin Watching	4.7	4.9
Bird Watching in coastal areas	8.7	3.7
Visiting Nature Reserves etc. in coastal areas	21.3	22.3
Other trips to the beach or seaside	483.8	650.8
Other trips to the islands	13.3	19.9

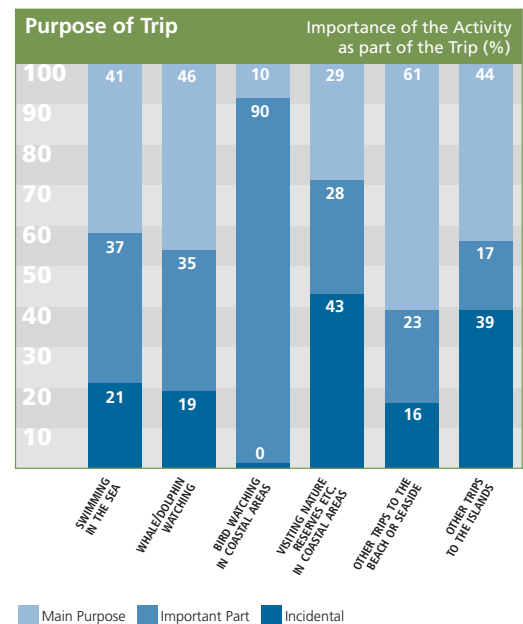
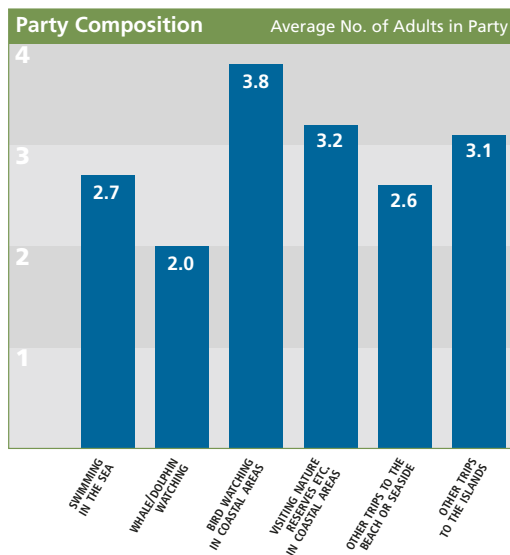


Frequency of Participation



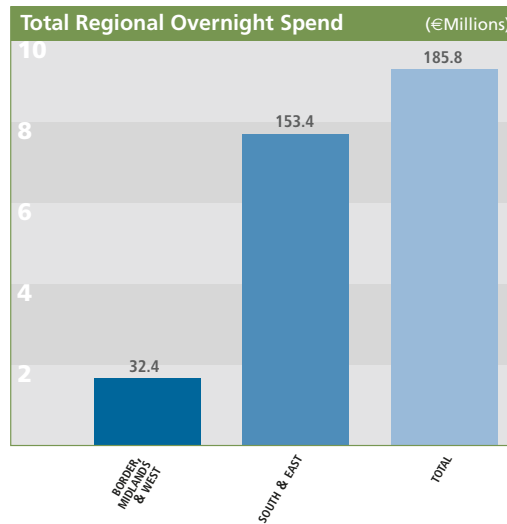
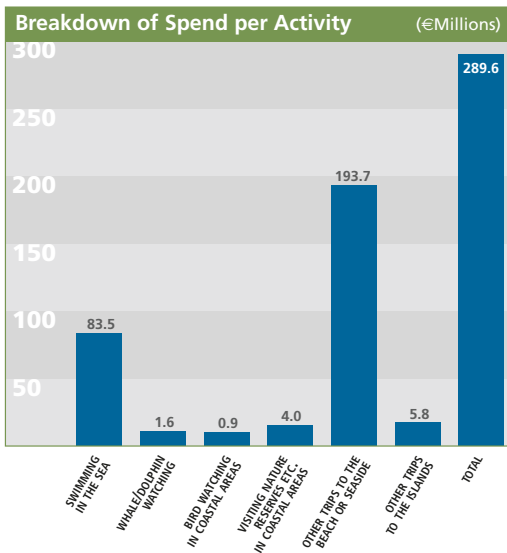
Overnight Trips

	Participants who report at least one o'night trip (000's)	Est. total no. of o'night trips (000's)	Av. length of o'night trips (No. of Days)	Est. total no. of o'nights (000's)
Swimming in the sea	54.8	201.2	2.4	478.6
Whale/Dolphin Watching	3.3	5.4	1.6	8.3
Bird Watching in coastal areas	1.7	3.2	5.4	17.2
Visiting Nature Reserves etc. in coastal areas	6.6	9.2	2.5	22.7
Other trips to the beach or seaside	132.5	469.9	2.6	1,235.1
Other trips to the islands	19.0	21.6	2.4	51.0
Total		710.5		1,812.9



Expenditure

Breakdown of Spend			(€Millions)
	Equipment	Daytrip	Overnight
Swimming in the sea	5.1	15.5	62.9
Whale/Dolphin Watching	0.6	0.2	0.8
Bird Watching in coastal areas	0.0	0.1	0.8
Visiting Nature Reserves etc. in coastal areas	0.7	1.7	1.7
Other trips to the beach or seaside	11.5	66.0	116.2
Other trips to the islands	0.9	1.5	3.4
Total	18.8	85.0	185.8



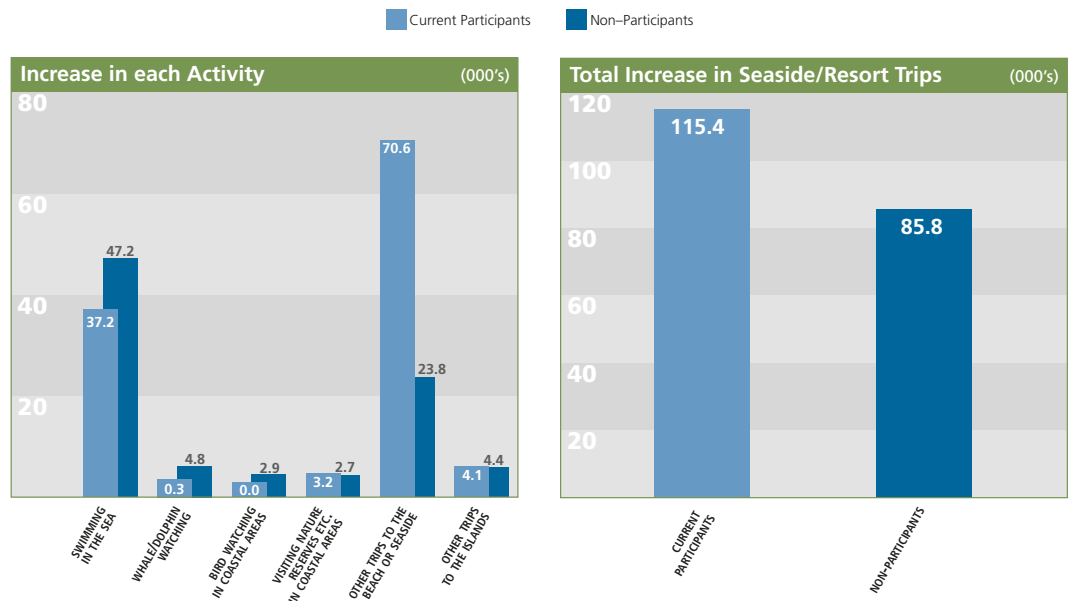
Regional Overnight Spend per Activity*			(€Millions)
	Border, Midlands & West	South & East	Total
Swimming in the sea	12.1	50.7	62.9
Whale/Dolphin Watching	0.4	0.4	0.8
Bird Watching in coastal areas	0.1	0.8	0.8
Visiting Nature Reserves etc. in coastal areas	0.1	1.5	1.7
Other trips to the beach or seaside	17.7	98.6	116.2
Other trips to the islands	2.0	1.4	3.4

*Given the relatively small sample size there will be some variance in regional figures recorded.

Employment Generated*		
	Direct Employment	Direct + Indirect Employment
Overnight expenditure – Main + Important	1,418	2,273
Expenditure on Equipment	180	288
Expenditure on Day Trips (Assume 50% displacement)	405	650
Total (With assumed 50% daytrip displacement)	2,003	3,211

*Employment Multiplier based on Henry and Deane in TTC (2002).

Potential Increase in Participation Levels if Facilities were Improved



*Note these results show respondents' opinions and do not conclusively demonstrate actual future behaviour.

Appendix A

M1 Column A

During the past 12 months did you engage in any marine or water-based leisure activities in the Republic of Ireland? This includes all types of angling, boating, sailing, watersports or other types of visit to the seaside. [Int. Read out each one and tick all that apply in Col. A]

M2 Column B + C

[For each activity engaged in] Did you engage in this activity on a day trip from home or on a trip involving an overnight stay or both? Enter number of day trips in past year in Col. B. Enter number of trips involving one or more overnights in past year in col. C.

M3 Column D

Thinking in terms of the overnight trips mentioned (in Col. C). Please tell me how many nights in total were spent away from home on these trips?

Activity	A. Tick if engaged in during past year	B. Number of occasions (day trips) in past year	C. Number of trips with at least one night away from home involving this activity	D. Total number of nights spent on all of the overnight trips away from home involving this activity
Fishing				
1 Freshwater angling for coarse fish (pike,bream,roach,perch etc.)	<input type="checkbox"/>	_____	_____	_____
2 Freshwater angling for game fish (trout, salmon, sea trout).	<input type="checkbox"/>	_____	_____	_____
3 Sea angling from shore.	<input type="checkbox"/>	_____	_____	_____
4 Sea angling from boat.	<input type="checkbox"/>	_____	_____	_____
Sailing/boating				
5 Sailing in the sea.	<input type="checkbox"/>	_____	_____	_____
6 Boating in the sea in rowing boats, canoes etc. (with or without out-board engine).	<input type="checkbox"/>	_____	_____	_____
7 Boating, cruising in the sea in power-boats, rigid inflatable boats (RIBS) or boats with in-board engine.	<input type="checkbox"/>	_____	_____	_____
8 Cruising, boating, sailing on inland waterways.	<input type="checkbox"/>	_____	_____	_____
Sea Sports				
9 Swimming in the sea.	<input type="checkbox"/>	_____	_____	_____
10 Water skiing/jet skiing.	<input type="checkbox"/>	_____	_____	_____
11 Surfing/sail boarding.	<input type="checkbox"/>	_____	_____	_____
12 Scuba diving/snorkelling.	<input type="checkbox"/>	_____	_____	_____
13 Other sea sports.	<input type="checkbox"/>	_____	_____	_____
Other				
14 Whale/dolphin watching.	<input type="checkbox"/>	_____	_____	_____
15 Bird watching in coastal areas.	<input type="checkbox"/>	_____	_____	_____
16 Visiting nature reserves etc. in coastal areas.	<input type="checkbox"/>	_____	_____	_____
17 Other trips to the beach or seaside.	<input type="checkbox"/>	_____	_____	_____
18 Other trips to the islands.	<input type="checkbox"/>	_____	_____	_____

M4 Column E

Now I would like you to think of the total number of nights spent on each activity away from home. Could you please break this down in terms of the total number of nights spent in each county.

M5 Column F & G

In the past 12 months, about how much did you spend on (i) supplies or equipment related to these activities (enter in Col. F) and (ii) in total on day trips involving this activity (enter in Col. G)? Please give your best estimate. (If one trip involved more than one activity, enter expenditure once only (opposite main activity) and write in “included in item ... above/below” opposite other activities engaged in.)

M6 Column H

(For each activity engaged in) On the whole, how satisfied were you with the facilities for this activity in Ireland? Enter code in Col. H. 1= very satisfied, 2 = quite satisfied/satisfied, 3= can't decide, 4 = dissatisfied, 5 = very dissatisfied).

E.			Total € spent in past year on:		H.
			F.	G.	
How did this total break down in terms of county			Equipment or supplies for this activity	Day trips involving this activity	Satisfied? 1 = v. satisfied 5 = v. dissatisfied
1. County : Nights	2. County : Nights	3. County : Nights			
____ : ____	____ : ____	____ : ____	€ _____	€ _____	_____
____ : ____	____ : ____	____ : ____	€ _____	€ _____	_____
____ : ____	____ : ____	____ : ____	€ _____	€ _____	_____
____ : ____	____ : ____	____ : ____	€ _____	€ _____	_____
____ : ____	____ : ____	____ : ____	€ _____	€ _____	_____
____ : ____	____ : ____	____ : ____	€ _____	€ _____	_____
____ : ____	____ : ____	____ : ____	€ _____	€ _____	_____
____ : ____	____ : ____	____ : ____	€ _____	€ _____	_____
____ : ____	____ : ____	____ : ____	€ _____	€ _____	_____
____ : ____	____ : ____	____ : ____	€ _____	€ _____	_____
____ : ____	____ : ____	____ : ____	€ _____	€ _____	_____
____ : ____	____ : ____	____ : ____	€ _____	€ _____	_____
____ : ____	____ : ____	____ : ____	€ _____	€ _____	_____
____ : ____	____ : ____	____ : ____	€ _____	€ _____	_____

M7 Interviewer: Was Sailing or boating activity mentioned above - i.e. items 5; 6; 7; or 8 above
 Yes ——— Go to M8 No ——— Go to M11

For respondents who participated in sailing or boating activity - items 5; 6; 7; or 8 above

M8 You mentioned that you (Int. Item 5 or 6 or 7 or 8)
Did you own the boat which you used; was it rented; other (borrowed etc.)?
 Owned Rented Other (borrowed etc.)

M9 Where did you mainly use the boat?
 In the sea Inland waterways

M10 How would you best describe the boat which you mainly used?
(Int: Tick as many as relevant if more than 1 boat used)

Non powered craft (canoe, rowing boat etc.)	<input type="checkbox"/>	Sports cruiser	<input type="checkbox"/>
Sailing dinghy	<input type="checkbox"/>	Motor boat or motor sailer	<input type="checkbox"/>
Sailing boat with auxiliary engine	<input type="checkbox"/>	Rigid inflatable boat (RIB)	<input type="checkbox"/>
Personal watercraft, e.g jet ski etc.	<input type="checkbox"/>	Other (please specify)	<input type="checkbox"/>
Small (less than 20 ft) fast powered boat	<input type="checkbox"/>	_____	

M11 (If participated in at least 1 of the 18 activities) Do you think you would have participated more often in any of these activities if the facilities in Ireland were better?
 Yes, would participate (more) No, would not participate (more)

(If participated in at least 1 of the 18 activities) Do you think you would start to participate in some of these activities if the facilities in Ireland were better?

Yes, would participate (more) No, would not participate (more)

M12 If Yes, in which activity(ies)? Enter activity code(s) 1-18 from list overleaf:

M13 Do you have any comments on the present facilities or infrastructure available to you for the activities in which you participated in Ireland in the last year. (Write in relevant activity code(s) in col. I and write in comment in col. J below)

I. Activity Code

(1-18) from list opposite

J. Comment on infrastructure or facilities available

M14 Do you have any comments in general on the marine environment in Ireland?

(If respondent has any overnight trips involving one or more of the activities i.e., any entry in Col. C overleaf)

M15 Finally I would like you to briefly consider the overnight trips you mentioned, i.e. read out the activities from col. C

(i) Would you say that this (these) activity(ies) was (were) usually (Tick one of the following):

The main purpose of your trip

An important part of your trip

Just incidental to your trip

(ii) How many people (adults and children) were usually in the party?

Adults Children (under 16)

(iii) About how much did the party *usually* spend on the following on each trip? (include average cost per trip for any annual items such as caravan parking fees, holiday house maintenance etc. if applicable)

€ per trip

Accommodation and Meals _____

Travel _____

All other items _____

Appendix B

Table A3.1: Number and percentage of persons participating in each leisure activity, 2003 and 1996.

Activity	2003		1996	
	Total Participants (000's)	Per cent	Total Participants (000's)	Per cent
ANGLING				
Freshwater Angling for coarse fish	66.5	2.2	66.2	2.5
Freshwater Angling for game fish	80.5	2.7	76.4	2.9
Sea Angling from the shore	74.1	2.5	53.6	2.0
Sea Angling from boat	53.0	1.8	34.3	1.3
Any type of Angling	218.0	7.2	190.0	7.2
COASTAL & INLAND BOATING				
Sailing	58.8	2.0	49.9	1.9
Boating in the sea in row boats, canoes etc.	32.1	1.1	*	-
Boating in power boats etc. in the sea	24.6	0.8	*	-
Cruising, Boating on inland waterways	42.8	1.4	30.1	1.1
Any type of Boating or Sailing	142.8	4.7	143.9	5.5
WATERSPORTS				
Water Skiing, Jet Skiing	19.2	0.6	*	-
Surfing, Sail boarding	17.8	0.6	*	-
Scuba Diving, Snorkelling	9.1	0.3	*	-
Other Sea Sports	7.3	0.2	*	-
SEASIDE/RESORT TRIPS				
Swimming in the sea	353.5	11.7	538.8	20.4
Whale/Dolphin Watching	9.6	0.3	15.9	0.6
Bird Watching in coastal areas	12.4	0.4	31.2	1.2
Visiting Nature Reserves etc. in coastal areas	43.5	1.4	84.6	3.2
Other trips to the beach or seaside	1,134.6	37.6	1,047.8	39.8
Other trips to the islands	33.2	1.1	*	-
Any of the above water-based leisure activities	1,475.8	49.0	1,468.2	55.7
All Adults in the population	3,013.6		2,634.0	

*Comparable figures for these activities are not available from the 1996 survey. In the earlier round of the survey boating in the sea in row boats, canoes etc and boating power boats etc. in the sea were not identified separately. Neither were water sports, such as water skiing, jet skiing; surfing; sail boarding; scuba diving; snorkelling; other sea sports and trips to the islands.

Table A3.2: Estimated 95% confidence intervals in 2003 for the actual incidence probabilities.

		2003						
	No. of cases	% participating	95% level 1.5 deff confidence int. +/- %	lower limit %	upper limit %	Point estimate Number	Lower limit Number	Upper limit Number
ANGLING								
Freshwater Angling for coarse fish	4,400	2.2	+/-0.65%	1.55%	2.85%	66,299	46,707	85,892
Freshwater Angling for game fish	4,400	2.7	+/-0.72%	1.98%	3.42%	81,367	59,718	103,017
Sea Angling from the shore	4,400	2.5	+/-0.69%	1.81%	3.19%	75,340	54,487	96,193
Sea Angling from boat	4,400	1.8	+/-0.59%	1.21%	2.39%	54,245	36,487	72,003
Any type of Angling	4,400	7.2	+/-1.15%	6.05%	8.35%	216,979	182,453	251,505
COASTAL & INLAND BOATING								
Sailing	4,400	2.0	+/-0.62%	1.38%	2.62%	60,272	41,572	78,972
Boating in the sea in row boats, canoes etc.	4,400	1.1	+/-0.46%	0.64%	1.56%	33,150	19,218	47,081
Boating in power boats etc. in the sea	4,400	0.8	+/-0.39%	0.41%	1.19%	24,109	12,210	36,008
Cruising, Boating on inland waterways	4,400	1.4	+/-0.52%	0.88%	1.92%	42,190	26,497	57,884
Any type of Boating or Sailing	4,400	4.7	+/-0.94%	3.76%	5.64%	141,639	113,371	169,908
WATERSPORTS								
Water Skiing, Jet Skiing	4,400	0.6	+/-0.34%	0.26%	0.94%	18,082	7,766	28,397
Surfing, Sail boarding	4,400	0.6	+/-0.34%	0.26%	0.94%	18,082	7,766	28,397
Scuba Diving, Snorkelling	4,400	0.3	+/-0.24%	0.06%	0.54%	9,041	1,736	16,346
Other Sea Sports	4,400	0.2	+/-0.20%	0.00%	0.40%	6,027	60	11,995
SEASIDE/RESORT TRIPS								
Swimming in the sea	4,400	11.7	+/-1.42%	10.28%	13.12%	352,591	309,659	395,523
Whale/Dolphin Watching	4,400	0.3	+/-0.24%	0.06%	0.54%	9,041	1,736	16,346
Bird Watching in coastal areas	4,400	0.4	+/-0.28%	0.12%	0.68%	12,054	3,624	20,485
Visiting Nature Reserves etc. in coastal areas	4,400	1.4	+/-0.52%	0.88%	1.92%	42,190	26,497	57,884
Other trips to the beach or seaside	4,400	37.6	+/-2.15%	35.45%	39.75%	1,133,114	1,068,415	1,197,812
Other trips to the islands	4,400	1.1	+/-0.46%	0.64%	1.56%	33,150	19,218	47,081
Any of the above water-based leisure activities	4,400	49	+/-2.22%	46.78%	51.22%	1,476,664	1,409,893	1,543,435
Aggregate figures for 2 boating categories; 4 sports categories and 2 'other' trips categories.								
Row/Power boats	4400	1.8	0.59	1.21	2.39	54,245	36,487	72,003
Any of 4 sports	4400	1.7	0.57	1.13	2.27	51,231	33,965	68,498
Any of 2 'other trips'	4400	38.1	2.15	35.95	40.25	1,148,182	1,083,316	1,213,047

Table A3.2 continued.

		1996						
	No. of cases	% participating	95% level 1.5 deff confidence int. +/-1 %	lower limit %	upper limit %	Point estimate Number	Lower limit Number	Upper limit Number
ANGLING								
Freshwater Angling for coarse fish	4,166	2.5	+/-0.71%	1.80%	3.23%	66,245	47,459	85,031
Freshwater Angling for game fish	4,166	2.9	+/-0.76%	2.14%	3.66%	76,386	56,253	96,519
Sea Angling from the shore	4,166	2.0	+/-0.64%	1.39%	2.68%	53,602	36,662	70,542
Sea Angling from boat	4,166	1.3	+/-0.52%	0.79%	1.82%	34,347	20,736	47,958
Any type of Angling	4,166	7.2	+/-1.18%	6.04%	8.39%	190,043	159,000	221,086
COASTAL & INLAND BOATING								
Sailing	4,166	1.9	+/-0.62%	1.27%	2.51%	49,862	33,511	66,212
Boating in the sea in row boats, canoes etc.	4,166	3.1	+/-0.79%	2.31%	3.88%	81,522	60,744	102,300
Cruising, Boating on inland waterways	4,166	1.1	+/-0.48%	0.66%	1.63%	30,107	17,353	42,860
Any type of Boating or Sailing	4,166	5.5	+/-1.04%	4.43%	6.50%	143,948	116,677	171,219
WATERSPORTS								
Water Skiing, Jet Skiing/other Sea Sports	4,166	1.2	+/-0.49%	0.68%	1.67%	30,950	18,021	43,878
SEASIDE/RESORT TRIPS								
Swimming in the sea	4,166	20.5	+/-1.84%	18.62%	22.29%	538,785	490,389	587,181
Whale/dolphin watching	4,166	0.6	+/-0.35%	0.25%	0.96%	15,936	6,632	25,240
Bird Watching in coastal areas	4,166	1.2	+/-0.49%	0.69%	1.68%	31,187	18,209	44,164
Visiting Nature Reserves etc. in coastal areas	4,166	3.2	+/-0.80%	2.41%	4.01%	84,578	63,426	105,729
Other trips to the beach or seaside	4,166	39.8	+/-2.23%	37.55%	42.01%	1,047,805	989,082	1,106,528
Any of the above water-based leisure activities	4,166	55.7	+/-2.26%	53.48%	58.00%	1,468,218	1,408,625	1,527,810

Table A3.3: Number of respondents participating in leisure activity, classified by gender.

Activity	Number of Participants, 2003			Participant Rate (%), 2003			Participant Rate (%), 1996		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
ANGLING									
Freshwater Angling for coarse fish	48,998	17,473	66,471	3.3	1.1	2.2	4.4	0.7	2.5
Freshwater Angling for game fish	74,222	6,300	80,522	5.0	0.4	2.7	5.4	0.5	2.9
Sea Angling from the shore	62,747	11,313	74,060	4.2	0.7	2.5	3.4	0.7	2.0
Sea Angling from boat	46,815	6,158	52,973	3.2	0.4	1.8	2.4	0.2	1.3
Any type of Angling	181,611	36,381	217,992	12.3	2.4	7.2	12.8	1.9	7.2
COASTAL & INLAND BOATING									
Sailing	30,453	28,396	58,849	2.1	1.9	2.0	2.2	1.6	1.9
Boating in the sea in row boats, canoes etc.	15,570	16,551	32,121	1.1	1.1	1.1	4.1	2.1	3.1
Boating in power boats etc. in the sea	13,779	10,790	24,569	0.9	0.7	0.8	n.a	n.a	n.a
Cruising, Boating on inland waterways	30,216	12,624	42,840	2.0	0.8	1.4	1.4	0.9	1.1
Any type of Boating or Sailing	80,745	62,094	142,839	5.4	4.1	4.7	6.9	4.1	5.5
WATERSPORTS									
Water Skiing, Jet Skiing	13,878	5,338	19,216	0.9	0.3	0.6	1.5	0.9	1.2
Surfing, Sail boarding	8,971	8,799	17,770	0.6	0.6	0.6	n.a	n.a	n.a
Scuba Diving, Snorkelling	5,979	3,136	9,115	0.4	0.2	0.3	n.a	n.a	n.a
Other Sea Sports	3,528	3,772	7,300	0.2	0.2	0.2	n.a	n.a	n.a
SEASIDE/RESORT TRIPS									
Swimming in the sea	163,963	189,569	353,532	11.1	12.4	11.7	22.4	18.6	20.4
Whale/Dolphin Watching	4,710	4,850	9,560	0.3	0.3	0.3	0.7	0.5	0.6
Bird Watching in coastal areas	8,650	3,720	12,370	0.6	0.2	0.4	1.5	0.9	1.2
Visiting Nature Reserves etc. in coastal areas	21,272	22,265	43,537	1.4	1.5	1.4	3.4	3.0	3.2
Other trips to the beach or seaside	483,798	650,770	1,134,568	32.6	42.5	37.6	36.2	43.2	39.8
Other trips to the islands	13,266	19,929	33,195	0.9	1.3	1.1	n.a	n.a	n.a
Any of the above water-based leisure activities	726,386	749,405	1,475,791	49.0	48.9	49.0	57.3	54.2	55.7
(All Adults in the population)	(1,482,300)	(1,531,300)	(3,013,600)	100.0	100.0	100.0	100.0	100.0	100.0

n.a. – Comparable figures not collected in 1996 survey.

Table A3.4: Percentage of respondents participating in any leisure activity, classified by age group.

Activity	Participation rates (%) by age category, 2003					Participation rates (%) by age category, 1996				
	16-29yrs	30-49yrs	50-64yrs	65+yrs	Total	16-29yrs	30-49yrs	50-64yrs	65+yrs	Total
ANGLING										
Freshwater Angling for coarse fish	3.0	2.1	2.1	1.0	2.2	3.4	2.8	2.0	0.6	2.5
Freshwater Angling for game fish	3.1	3.2	2.0	1.4	2.7	3.8	3.1	2.6	0.9	2.9
Sea Angling from the shore	3.0	3.4	1.3	0.6	2.5	2.2	2.6	2.2	0.3	2.0
Sea Angling from boat	2.0	2.2	1.4	0.8	1.8	1.6	1.7	1.1	0	1.3
Any type of Angling	8.8	8.3	5.7	3.2	7.2	9.3	8.3	6.4	1.5	7.2
COASTAL & INLAND BOATING										
Sailing	3.6	1.6	1.0	0.5	2.0	3.1	1.7	1.9	0.1	1.9
Boating in the sea in row boats, canoes etc.	1.7	1.1	0.7	0.0	1.1	5.6	2.6	1.8	0.7	3.1
Boating in power boats etc. in the sea	1.5	0.7	0.5	0.2	0.8	n.a	n.a	n.a	n.a	n.a
Cruising, Boating on inland waterways	1.6	1.7	1.4	0.3	1.4	1.2	1.8	0.6	0.0	1.1
Any type of Boating or Sailing	7.3	4.8	3.4	0.7	4.7	8.7	5.5	4	0.8	5.5
WATERSPORTS										
Water Skiing, Jet Skiing	1.7	0.3	0.1	0.0	0.6	2.9	0.7	0.1	0.0	1.2
Surfing, Sail boarding	1.3	0.5	0.1	0.0	0.6	n.a	n.a	n.a	n.a	n.a
Scuba Diving, Snorkelling	0.4	0.4	0.3	0.0	0.3	n.a	n.a	n.a	n.a	n.a
Other Sea Sports	0.1	0.5	0.0	0.0	0.2	n.a	n.a	n.a	n.a	n.a
SEASIDE/RESORT TRIPS										
Swimming in the sea	18.8	11.6	7.5	2.6	11.7	27.1	26.1	12.6	3.2	20.4
Whale/Dolphin Watching	0.2	0.5	0.4	0.1	0.3	0.8	0.9	0.2	0.0	0.6
Bird Watching in coastal areas	0.1	0.8	0.4	0.2	0.4	0.9	1.5	1.0	1.2	1.2
Visiting Nature Reserves etc. in coastal areas	2.0	1.6	1.2	0.2	1.4	3.1	3.7	3.7	1.7	3.2
Other trips to the beach or seaside	40.1	42.2	36.7	22.6	37.6	40.8	46.1	37.8	25.3	39.8
Other trips to the islands	1.2	1.3	1.3	0.3	1.1	n.a	n.a	n.a	n.a	n.a
Any of the above water-based leisure activities	55.6	53.5	46.8	26.5	49.0	62.8	64.6	49.0	28.9	55.7
(All Adults in the population)	(930,800)	(1,072,500)	(574,800)	(435,500)	(3,013,600)	(801,000)	(957,000)	(465,000)	(413,000)	(2,635,000)

n.a. – Comparable figures not collected in 1996 survey.

Table A3.5: Percentage of respondents participating in any leisure activity, classified by education level.

Activity	2003 (Per cent)					1996 (Per cent)				
	Primary	Junior	Leaving	Third Level	Total	Primary	Junior	Leaving	Third Level	Total
ANGLING										
Freshwater Angling for coarse fish	2.5	2.0	2.0	2.6	2.2	1.3	3.2	3.4	1.9	2.5
Freshwater Angling for game fish	1.8	2.7	3.2	2.7	2.7	1.5	3.8	3.6	3.3	2.9
Sea Angling from the shore	0.9	3.7	2.6	3.6	2.5	1.0	2.0	3.1	2.3	2.0
Sea Angling from boat	1.0	1.8	1.7	3.5	1.8	0.7	1.0	1.8	1.9	1.3
Any type of Angling	5.7	8.4	7.3	9.0	7.2	4.1	8.4	9.5	7.5	7.2
COASTAL & INLAND BOATING										
Sailing	0.3	2.1	1.9	5.5	2.0	0.0	0.6	2.1	5.7	1.9
Boating in the sea in row boats, canoes etc.	0.1	1.4	1.1	2.7	1.1	1.2	1.8	3.4	7.3	3.1
Boating in power boats etc. in the sea	0.2	1.1	0.9	1.6	0.8	n.a	n.a	n.a	n.a	n.a
Cruising, Boating on inland waterways	0.4	1.9	1.4	3.0	1.4	0.1	0.6	1.1	2.6	1.1
Any type of Boating or Sailing	0.9	5.5	5.1	11.1	4.7	1.3	2.8	6.4	12.9	5.5
WATERSPORTS										
Water Skiing, Jet Skiing	0.0	0.6	1.1	0.7	0.6	0.2	0.5	1.6	3.1	1.2
Surfing, Sail boarding	0.0	1.1	0.5	1.7	0.6	n.a	n.a	n.a	n.a	n.a
Scuba Diving, Snorkelling	0.1	0.4	0.2	1.0	0.3	n.a	n.a	n.a	n.a	n.a
Other Sea Sports	0.2	0.2	0.3	0.2	0.2	n.a	n.a	n.a	n.a	n.a
SEASIDE/RESORT TRIPS										
Swimming in the sea	5.1	11.8	13.8	19.4	11.7	6.2	19.3	25.9	29.8	20.4
Whale/Dolphin Watching	0.1	0.3	0.4	0.7	0.3	0.0	0.4	0.4	1.9	0.6
Bird Watching in coastal areas	0.2	0.0	0.6	0.7	0.4	0.2	1.1	1.4	2.3	1.2
Visiting Nature Reserves etc. in coastal areas	1.1	0.5	1.7	2.6	1.4	1.2	2.5	4.0	5.9	3.2
Other trips to the beach or seaside	27.6	38.6	43.1	39.8	37.6	26.4	44.3	42.7	43	39.8
Other trips to the islands	0.4	1.0	1.0	3.2	1.1	n.a	n.a	n.a	n.a	n.a
Any of the above water-based leisure activities	34.9	49.7	54.5	60.5	49.0	33.2	59.4	62.9	65.2	55.7

n.a. – Comparable figures not collected in 1996 survey.

Table A3.6: Percentage of respondents participating in any leisure activity, classified by social class.

	2003 (%)							Total
	Self-Employed	Farmer	Professional/Managerial	Other Non-Manual	Skilled Manual	Unskilled Manual		
ANGLING								
Freshwater Angling for coarse fish	3.3	3.4	1.8	2.0	3.9	1.5	2.2	
Freshwater Angling for game fish	6.2	2.7	1.9	1.7	5.5	2.2	2.7	
Sea Angling from the shore	6.7	0.3	3.1	1.8	2.9	2.7	2.5	
Sea Angling from boat	3.9	0.7	2.4	1.5	1.7	2.1	1.8	
Any type of Angling	14.3	5.4	7.5	5.6	12.0	6.1	7.2	
COASTAL & INLAND BOATING								
Sailing	1.9	0.3	6.2	1.6	0.6	1.2	2.0	
Boating in the sea in row boats, canoes etc.	2.3	1.6	2.5	1.1	0.2	0.1	1.1	
Boating in power boats etc. in the sea	1.4	0.9	1.2	1.2	0.1	0.0	0.8	
Cruising, Boating on inland waterways	2.2	0.0	2.3	1.8	1.6	0.3	1.4	
Any type of Boating or Sailing	7.4	2.9	10.8	5.1	2.5	1.6	4.7	
WATERSPORTS								
Water Skiing, Jet Skiing	2.5	0.0	0.2	0.5	0.8	0.8	0.6	
Surfing, Sail boarding	0.1	0.0	1.7	0.6	0.1	0.0	0.6	
Scuba Diving, Snorkelling	0.5	0.7	0.3	0.2	0.3	0.1	0.3	
Other Sea Sports	0.5	0.0	0.3	0.1	0.4	0.4	0.2	
SEASIDE/RESORT TRIPS								
Swimming in the sea	11.0	7.0	21.2	11.8	9.1	8.3	11.7	
Whale/Dolphin Watching	0.2	0.0	0.6	0.4	0.1	0.2	0.3	
Bird Watching in coastal areas	0.9	0.0	0.4	0.3	0.8	0.4	0.4	
Visiting Nature Reserves etc. in coastal areas	1.4	0.4	2.9	1.4	2.1	0.7	1.4	
Other trips to the beach or seaside	41.6	17.8	50.6	44.5	32.2	33.5	37.6	
Other trips to the islands	1.3	1.0	2.2	1.1	1.2	0.4	1.1	
Any of the above water-based leisure activities	57.6	28.3	66.5	54.4	45.2	41.4	49.0	

Table A3.6 Continued.

	1996 (%)						Total
	Self-Employed	Farmer	Professional/Managerial	Other Non-Manual	Skilled Manual	Unskilled Manual	
ANGLING							
Freshwater Angling for coarse fish	3.3	2.9	1.9	1.9	4.1	1.7	2.5
Freshwater Angling for game fish	3.8	1.8	3.2	1.8	4.4	2.9	2.9
Sea Angling from the shore	4.5	0.6	1.7	2.0	2.9	1.9	2.0
Sea Angling from boat	3.1	1.0	1.2	1.6	1.6	0.4	1.3
Any type of Angling	10.7	5.6	6.5	5.3	10.7	6.8	7.2
COASTAL & INLAND BOATING							
Sailing	3.4	1.1	5.0	1.6	2.0	0.0	1.9
Boating in the sea in row boats, canoes etc.	3.4	1.9	5.0	3.8	4.0	0.4	3.1
Boating in power boats etc. in the sea	n.a	n.a	n.a	n.a	n.a	n.a	n.a
Cruising, Boating on inland waterways	1.5	0.8	2.7	1.3	1.0	0.3	1.1
Any type of Boating or Sailing	6.6	3.2	10.9	6.1	6.5	0.7	5.5
WATERSPORTS							
Water Skiing, Jet Skiing	1.3	1.3	2.7	1.2	0.9	0.4	1.2
Surfing, Sail boarding	n.a	n.a	n.a	n.a	n.a	n.a	n.a
Scuba Diving, Snorkelling	n.a	n.a	n.a	n.a	n.a	n.a	n.a
Other Sea Sports	n.a	n.a	n.a	n.a	n.a	n.a	n.a
SEASIDE/RESORT TRIPS							
Swimming in the sea	20.4	13.1	28.7	23.9	19.9	14.9	20.4
Whale/Dolphin Watching	0.9	0.7	0.8	0.8	0.4	0.4	0.6
Bird Watching in coastal areas	2.6	0.8	2.4	1.0	1.1	0.5	1.2
Visiting Nature Reserves etc. in coastal areas	4.7	2.5	6.3	3.2	2.8	1.5	3.2
Other trips to the beach or seaside	44.7	31.1	45.3	46.3	37.4	35.5	39.8
Other trips to the islands	n.a	n.a	n.a	n.a	n.a	n.a	n.a
Any of the above water-based leisure activities	60.9	43.5	68.2	61.1	56.8	46.6	55.7

n.a. – Comparable figures not collected in 1996 survey.

Table A3.7: Percentage of respondents participating in any leisure activity, classified by the presence of children.

Activity	2003 (%)					1996 (%)				
	Number of Children in the Household					Number of Children in the Household				
	None	One	Two	Three or More	Total	None	One	Two	Three or More	Total
ANGLING										
Freshwater Angling for coarse fish	1.9	3.3	1.6	2.5	2.2	2.4	2.4	2.5	2.8	2.5
Freshwater Angling for game fish	2.0	4.8	2.4	3.2	2.7	2.1	3.3	3.5	4.4	2.9
Sea Angling from the shore	1.7	3.5	3.5	3.3	2.5	1.3	2.5	3.2	2.9	2.0
Sea Angling from boat	1.3	2.4	1.9	2.9	1.8	0.8	2.7	1.5	1.7	1.3
Any type of Angling	5.2	11.4	8.0	9.8	7.2	5.6	8.7	9.1	9.2	7.2
COASTAL & INLAND BOATING										
Sailing	1.9	1.3	2.0	3.2	2.0	2.4	1.0	1.3	1.5	1.9
Boating in the sea in row boats, canoes etc.	0.5	1.2	2.1	2.4	1.1	2.7	4.8	2.9	3.0	3.1
Boating in power boats etc. in the sea	0.6	0.6	1.8	1.1	0.8	n.a	n.a	n.a	n.a	n.a
Cruising, Boating on inland waterways	0.9	2.0	2.5	1.8	1.4	0.9	1.3	1.8	1.2	1.1
Any type of Boating or Sailing	3.6	4.4	7.3	7.8	4.7	5.3	6.6	5.3	5.3	5.5
WATERSPORTS										
Water Skiing, Jet Skiing	0.5	1.5	0.8	0.0	0.6	1.1	2.1	0.9	0.8	1.2
Surfing, Sail boarding	0.4	1.3	0.7	0.5	0.6	n.a	n.a	n.a	n.a	n.a
Scuba Diving, Snorkelling	0.2	0.5	0.3	0.4	0.3	n.a	n.a	n.a	n.a	n.a
Other Sea Sports	0.2	0.1	0.2	0.9	0.2	n.a	n.a	n.a	n.a	n.a
SEASIDE/RESORT TRIPS										
Swimming in the sea	7.8	17.8	15.0	17.7	11.7	14.4	24.6	27.1	30.0	20.4
Whale/Dolphin Watching	0.2	0.2	0.6	0.7	0.3	0.6	0.7	0.8	0.4	0.6
Bird Watching in coastal areas	0.4	0.6	0.3	0.4	0.4	1.3	0.4	1.0	1.5	1.2
Visiting Nature Reserves etc. in coastal areas	1.0	1.1	3.7	1.5	1.4	3.1	3.1	4.2	2.9	3.2
Other trips to the beach or seaside	33.7	41.8	45.3	41.5	37.6	35.0	44.0	45.5	46.1	39.8
Other trips to the islands	0.9	1.8	1.4	0.5	1.1	n.a	n.a	n.a	n.a	n.a
Any of the above water-based leisure activities	42.1	58.1	58.3	57.7	49.0	47.6	64.1	65.6	65.2	55.7

n.a. – Comparable figures not collected in 1996 survey.

Table A5.1: Allocation of overnight expenditure to Main, Important or Incidental purpose of the trip classified by activity undertaken.

Activity	Overnight Expenditure			
	Main €Ms	Important €Ms	Incidental €Ms	Total €Ms
ANGLING				
Freshwater Angling for coarse fish	1.1	1.2	0.3	2.7
Freshwater Angling for game fish	3.9	0.9	0.1	4.9
Sea Angling from the shore	0.2	1.4	0.6	2.2
Sea Angling from boat	0.8	0.5	0.0	1.3
COASTAL & INLAND BOATING				
Sailing	11.3	0.7	0.3	12.3
Boating in the sea in row boats, canoes etc.	0.7	2.1	0.0	2.8
Boating in power boats etc. in the sea	1.9	0.1	0.0	2.0
Cruising, Boating on inland waterways	3.6	2.2	0.5	6.4
WATERSPORTS				
Water Skiing, Jet Skiing	0.1	0.0	0.0	0.1
Surfing, Sail boarding	4.5	0.1	0.0	4.6
Scuba Diving, Snorkelling	3.3	0.2	0.0	3.5
Other Sea Sports	0.1	0.0	0.0	0.1
SEASIDE/RESORT TRIPS				
Swimming in the sea	6.9	43.9	12.2	62.9
Whale/Dolphin Watching	0.3	0.4	0.2	0.8
Bird Watching in coastal areas	0.0	0.8	0.0	0.8
Visiting Nature Reserves etc. in coastal areas	0.4	0.9	0.3	1.7
Other trips to the beach or seaside	69.5	22.3	24.4	116.2
Other trips to the islands	1.9	1.1	0.4	3.4
Total	110.5	78.8	39.4	228.7
Per Cent	48.3%	34.5%	17.2%	100.0%

Table A5.2: Estimated total national expenditure on equipment, day trips and overnights.

Activity	Equipment €Ms	Daytrip €Ms	Overnight €Ms	Total €Ms	Per cent of total
ANGLING					
Freshwater Angling for coarse fish	6.4	2.1	2.7	11.2	2.6%
Freshwater Angling for game fish	9.6	7.6	4.9	22.1	5.1%
Sea Angling from the shore	7.2	4.5	2.2	14.0	3.2%
Sea Angling from boat	4.6	5.8	1.3	11.6	2.7%
COASTAL & INLAND BOATING					
Sailing	9.4	3.1	12.3	24.7	5.7%
Boating in the sea in row boats, canoes etc.	0.6	0.6	2.8	4.1	0.9%
Boating in power boats etc. in the sea	0.7	1.4	2.0	4.0	0.9%
Cruising, Boating on inland waterways	4.2	6.3	6.4	16.9	3.9%
WATERSPORTS					
Water Skiing, Jet Skiing	13.2	4.5	0.1	17.8	4.1%
Surfing, Sail boarding	1.1	1.5	4.6	7.2	1.7%
Scuba Diving, Snorkelling	4.9	1.0	3.5	9.4	2.2%
Other Sea Sports	0.3	0.5	0.1	0.8	0.2%
SEASIDE/RESORT TRIPS					
Swimming in the sea	5.1	15.5	62.9	83.5	19.3%
Whale/Dolphin Watching	0.6	0.2	0.8	1.6	0.4%
Bird Watching in coastal areas	0.0	0.1	0.8	0.9	0.2%
Visiting Nature Reserves etc. in coastal areas	0.7	1.7	1.7	4.0	0.9%
Other trips to the beach or seaside	11.5	66.0	116.2	193.7	44.7%
Other trips to the islands	0.9	1.5	3.4	5.8	1.3%
Total	81.0	123.9	228.7	433.6	100.0%

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