

**An Examination of the Marine Tourism
Business Sector in the West of Ireland:
Capabilities, Performance and
Contribution to the Regional Economy**

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requirements of HETAC
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I

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This is a business research study which focuses on marine tourism businesses in the West of Ireland and it could not have been completed without access to the marine tourism businesses in the region, the Marine Institute in Ireland and the support from Fáilte Ireland through the 'Fáilte Ireland Tourism Research Scholarship Award Scheme from 2006 to 2008'.

I would also like to thank the Ireland Newfoundland Partnership for their support and assistance, which enabled me to conduct research on an Atlantic marine tourism site and form links with the Memorial University Newfoundland and Labrador, Canada and the Marine Institute Newfoundland.

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ABSTRACT

This is a business research study with the primary aim being the examination of the marine tourism business sector in the West of Ireland and assessment of its contribution to the regional economy. According to the Irish Regions Office (Irish Regions, 2008), the West Region of Ireland comprises the counties of Galway, Mayo and Roscommon. This thesis explores three main themes including the product, the person and related policy. The product theme includes the marine tourism product capabilities, business performance and challenges. The person theme includes marine tourism business customers, tourist motivations, characteristics, participation levels and a visitor profile. The policy theme includes marine tourism development agents, strategic plan assessments, and funding of the marine tourism business sector.

This study has led to the development of an evaluation model for the marine tourism business sector in the region. This model identifies the characteristics and capabilities of the marine tourism businesses, establishes the information needs and appropriate systems required to support the sector, and identifies strategic policies that could be adopted by Government to develop and grow the sector long term. The methods and procedures used in gathering data for this research study involved firstly an extensive literature review that examined the tourism industry, small tourism businesses characteristics, the historical development of the marine tourism sector, the range of water-based products and infrastructure available in the region, marine tourism sector performance, marine tourism legislation and environmental issues, and a variety of tourism economic evaluation techniques. Secondly, a primary research programme, targeting marine tourism businesses in the West Region of Ireland was undertaken. An appropriate West Region sampling frame was established consisting of 61 marine tourism operators (i.e. operators are defined as businesses selling marine tourism activities or adventure packages to domestic and international marine tourists) and 23 marine tourism associates (i.e. associates are defined as businesses selling marine equipment such as; fishing rods, tackle, chandlery, surfing boards, sailing equipment, marine electronics or other marine maintenance services to operators, boat owners, locals, fishermen, state agents and tourists). The primary research methods used in this regional study included questionnaires and one to one interviews with marine tourism businesses. In addition a case study was developed on the performance of businesses in an Irish seaside resort town, Roundstone in Co. Galway, in the West of Ireland.

'A 3P's Marine Tourism Business Sector Evaluation Model' emerged from the literature review, which represents the three major research themes (i.e. Product, Person and Policy) and this model has contributed to the assessment and evaluation of the West of Ireland's marine tourism business sector. This study found that the marine tourism business sector in the West Region is typically family owner operated, generally small scale, highly seasonal and undercapitalised. On the 'Product' aspect, marine tourism adventure day packages range from €40-70 and three day packages start at €365. Based on 2006 business figures recorded, the total income generated by the marine tourism operators in the Region is estimated to be €24.27m, with total economic impact equating to €35.919m. The marine tourism business operator multiplier is therefore 1.48. In 2006, it is estimated that the marine tourism businesses employed approximately 394 people full-time and 295 people part-time. The employment multiplier equates to 1.4 and this means that for every 1 job directly employed by a marine tourism business in the West of Ireland there is also .4 jobs indirectly supported.

On the 'Person' aspect, this study found that over 45% of marine tourism operator customers in the Region range from 36-55 years of age. Teenagers have a 16% share and the 19-25 age bracket is lower at just 12%. Marine tourists to the West are specialist to casual users/general holiday visitors. They can range from a dabbler, an enthusiast, an expert to a fanatic (Brotherton and Himmetoglu, 1997) and marine tourists visiting the West of Ireland spend approximately €116.74 per day.

On the 'Policy' aspect, this study found that there is no lead agency in Ireland responsible for both marketing and product development of the marine tourism business sector. Other business development barriers include: bureaucratic funding procedures; out of date planning and development laws (i.e. Foreshore Act 1933); and a lack of knowledge, networking and information sharing among the marine tourism business sector. On the funding aspect, this study found that the Irish government in 2006 invested only €1.124m (.7% of the total all Ireland tourism investment and development funds) in water based tourism enterprises or activities, where Mayo received 81% share of the funds, Galway 15% and Roscommon just 4%.

This thesis concludes with a number of recommendations to develop and grow the marine tourism business sector in Ireland including the appointment of a lead government agency to take control and management of the sector at all levels; the development of a 'marine tourism business sector internet hub'; the investment in marine educational programmes at primary and secondary level to tackle participation levels; the investment and development in a network of marinas in the West of Ireland through public private partnerships, to build on the Volvo Ocean Race 2009 infrastructure investment in Galway; a re-design of the Fáilte Ireland Exit Survey to capture marine tourist data more effectively; modernisation of the Foreshore Act to encourage economic development; and investment in beach resort tourism programmes to support the businesses in the region.

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Glossary of Abbreviations

ACOST	Advisory Council on Science and Technology
AEIST	International Association of Scientific Experts in Tourism
AENP	Addo Elephant National Park
BES	Business Expansion Scheme (Ireland)
BMF	British Marine Federation
BMW	Border Midlands West Region in Ireland
CEB/LEADER	City and County Enterprise Boards/LEADER Groups, which provide support for micro-enterprise and rural development at a local level (Ireland)
CERT	Former name of Fáilte Ireland Training Organisation
CGE	Computable General Equilibrium
CSO	Central Statistics Office (Ireland)
DCMNR	Department of Communication Marine and Natural Resources (Ireland)
DG-ECFIN	Directorate-General for Economic and Financial Affairs (European Commission)
ESCAP	Economic and Social Development in Asia and the Pacific
ESRI	Economic Social Research Institute (Ireland)
EU	European Union
Eurostat	European Statistics
FEE	Foundation for Environmental Education
FTE	Full Time Employed
GBRMPA	Great Barrier Reef Marine Park
GDP	Gross Domestic Product
GMIT	Galway-Mayo Institute of Technology
GNP	Gross National Product
GVA	Gross Value Added
HWM	High Water Mark
IBEC	Irish Business and Employers Confederation
ICES	International Council for the Exploration of the Sea
ICOMIA	International Council of Marine Industries Associations
ICZM	Integrated Coastal Zone Management
IFI	International Fund for Ireland
IHF	Irish Hotels Federation
IMF	Irish Marine Federation
INP	Ireland Newfoundland Partnership

INTERREG	Is an EU-funded programme that helps Europe's regions form partnerships to work together on common projects
IPK	Institute of Public Knowledge
IRIOS	Input-Output Software
IRO	Irish Regions Office
ISMS	Irish Sea Marine Sector
IUCN	International Union for Conservation of Nature
META	Marine Ecotourism for the Atlantic Area
MWTL	Marine and Water-based Tourism and Leisure Sector
NDP	National Development Plan (NDP)
NGO	Non Governmental Organisation
NOAA	National Oceanic and Atmospheric Association (US)
NUTS	Nomenclature of Territorial Units for Statistics - used by Eurostat and other European Union bodies.
OECD	Organisation for Economic Co-operation and Development
PATA	Pacific Asia Travel Association
PESCA	European Union aid programme for the development of the fishing industry in Ireland (1994-99)
ROP	Regional Operational Programmes
RTDI	Research, Technological Development and Innovation
SCUBA	Self Contained Underwater Breathing Apparatus
SEAWO-MEN	An AquaReg funded Programme, which promotes aquaculture exchanges between the BMW region in Ireland, Galicia in Spain and Trondelag in Norway.
SME	Small Medium Enterprise
SNA	System of National Accounts
STEAM	Scarborough Tourism Economic Activity Model
STECF	Scientific, Technical and Economic Committee on Fisheries
TPDS	Tourism Product Development Scheme
TPRG	Tourism Policy Review Group
TSA	Tourism Satellite Account
UNSC	United Nations Statistical Committee
UNWTO	United Nations World Tourism Organisation
VFR	Visiting Friends and Relatives
WHCTHR	West of Ireland Centre for Tourism and Hospitality Research (GMIT, Galway, Ireland)
WTO	World Tourism Organisation

CHAPTER 1 INTRODUCTION

1.1 Research Study Aim

This is a business research study with the primary aim being the examination of the marine tourism business sector in the West of Ireland and assessment of its contribution to the regional economy. According to the Irish Regions Office (Irish Regions, 2008), the West Region of Ireland comprises the counties of Galway, Mayo and Roscommon. This thesis explores three main themes including the product, the person and related policy. The product theme includes the marine tourism historical developments, the range of products, and marine tourism business performance and challenges. The person theme includes marine tourism business customers, marine tourist motivations and characteristics, participation levels and a visitor profile. The policy theme includes marine tourism development agents, strategic plan assessments, and funding of the marine tourism sector.

The marine tourism business sector in the West Region is made up of 61 operators and 23 associates (Ginty, 2006 and 2007). The operators are defined as businesses selling marine tourism activities or adventure packages to domestic and international marine tourists. The associates are defined as businesses selling marine equipment such as; fishing rods, tackle, chandlery, surfing boards, sailing equipment, marine electronics or other marine maintenance services to operators, boat owners, locals, fishermen, state agents and tourists.

1.2 Background to the Study

In 2004, the Marine Institute in Ireland commissioned GMIT to undertake a 'Water-based Visitor Study' in the West of Ireland that focused on developing an understanding of water-based tourism in the Region. This study highlighted a lack of regional economic data on the impact of marine tourism business activities. The studies that existed (i.e. Fáilte Ireland Fact Sheets and ESRI 2003) focus nationally and have a broad methodological approach which limits the extent to which they can inform regional tourism providers, policy and decision makers. Following this GMIT was awarded Strand I funding from the Department of Education to undertake a masters research study to build on the success of the regional marine tourism visitor profile study.

From 2004 to 2006 the demands of the study increased and in mid 2006 a proposal was prepared by the researcher to transfer the study from masters to PhD level. At the same time an opportunity arose to apply for a scholarship fund with Fáilte Ireland to support the study to PhD level. The researcher prepared a proposal and draft chapters of the thesis were also submitted for review to an international assessment panel. In August 2006, the researcher was awarded the Fáilte Ireland Scholarship award to support the study to PhD level. Only one candidate in Ireland

each year is awarded this scholarship. This endorsement of the study from Fáilte Ireland financed and motivated the researcher to the next stage of the research study.

An international research opportunity arose in 2007 and 2008 to add to the study, following two funding awards from the Ireland Newfoundland Partnership. The aim of the study was to investigate an Atlantic marine tourism site with Irish connections and develop a case study for inclusion in the PhD thesis. This case study is presented in Appendix 2. This opportunity has opened doors for further research post the PhD submission, including collaboration with the Newfoundland University on the development of a marine tourism undergraduate degree for GMIT and the development of an international marine tourism management module for a future post graduate programme at GMIT.

Other opportunities and outputs of this PhD journey include the all Ireland 'Ocean Adventure Schools Programme' and the 'Inishbofin Tourism Development Plan', which are discussed in Chapter Eight under research outputs and the researchers PhD reflection.

1.3 Research Objectives

The primary aim of this research study is to examine the marine tourism business sector in the West of Ireland and assess its contribution to the regional economy. This can be broken into detailed objectives as follows;

- 1) Gain an increased understanding of the marine tourism sector – internationally, in Ireland and in the West region of Ireland.
- 2) Define the types of direct and indirect marine tourism activities that exist in the West Region of Ireland.
- 3) Analyse the economic benefits of marine tourism business activities specifically in relation to supporting communities within the West of Ireland.
- 4) Determine the income and cost profile of marine tourism operator businesses in the region and explore how financial leakage from the providing communities can be minimised.
- 5) Design an evaluation model that represents the marine tourism sectors contribution to the regional economy.
- 6) Make recommendations on the potential for developing the marine tourism sector in Ireland and the Region.

These objectives are further broken into subsections focusing on gathering qualitative and quantitative data regarding:

- (i) Profile of visitors to the West of Ireland.
- (ii) Expenditure on tourism products and services during visitor trips to the West of Ireland.

- (iii) The range and type of water based activities undertaken by the domestic and international tourist in Ireland and the West of Ireland.
- (iv) An examination of the marine tourism businesses marketing activities, customer profile, business challenges and financial contributions to the region.
- (v) An evaluation of investment and development strategies from policy providers and state support centres in the region.
- (vi) An analysis on the performance of a seaside business community in the West of Ireland.
- (vii) Construction of an organisational chart for the Marine Tourism Sector in Ireland.
- (viii) The development of an international Atlantic marine tourism site case study (i.e. Newfoundland, Canada). *(Note: The research undertaken to achieve this objective is presented as a case study in Appendix 2.)*

1.4 Marine Tourism Defined

Marine tourism shares a number of similarities with the wider tourism industry, however an important distinction of marine tourism is that it is a leisure experience, which occurs in a natural water-based location. There are a number of definitions available in the literature, which describes this niche tourism market. Hall and Page (2006) describe the concept of coastal tourism, as a full range of tourism leisure and recreationally orientated activities that takes place in the coastal zone and the offshore coastal waters. Marine tourism is closely related to this concept of coastal tourism but also includes ocean-based tourism such as deep sea fishing and yacht cruising, and inland water-based activities such as fresh water angling and other water based pursuits. Orams (1999) defines marine tourism as recreational activities that involve travel away from one's place of residence and which have as their host or focus the marine environment (where the marine environment is defined as those waters which are saline and tide-affected). This definition attempts to acknowledge the term 'marine' in its biological sense – it does, however, exclude freshwater aquatic environments. On the other hand, Jennings (2003) describes water based tourism relating to any marine tourism activity undertaken in or in relation to water resources, such as lakes, dams, canals, creeks, streams, rivers, waterways, marine coastal zones, seas, oceans and ice-associated areas. This definition attempts to address the complete set of offerings available to marine tourists and offered by marine tourism businesses.

In summary, this research study defines marine tourism, marine leisure tourism or water-based tourism as recreational activities associated with the natural water-based surroundings that can be saline, tide affected and/or inland fresh water recreational and aquatic environments. Marine tourism activities may be formally organised through operators or undertaken independently. They may form the basis of a specialist holiday or simply be an element of a conventional holiday.

1.5 Marine Tourism Global Market

Ocean and coastal tourism is widely regarded as one of the fastest growing areas of contemporary tourism (Pollard 1995; Kim and Kim 1996; Orams 1999; Hall and Page 2006), however it does remain under researched. The sea has a strong attraction to people, and this growth is not surprising given the fact that; six out of ten people around the world reside within 60 kilometres of the coastline and two thirds of the world's cities with populations greater than 2.5 million are located by tidal estuaries (Miller 1993). Indeed, in the United States, the National Oceanic and Atmospheric Association (NOAA) (1997) recognised that of all the activities taking place in the coastal zones and the near-shore coastal ocean, none is increasing in both volume and diversity more than coastal tourism and recreation. Both the dynamic nature of this sector and its magnitude demand that it be actively taken into account in government plans, policies and programmes related to the coasts and ocean (Hall and Page, 2006).

In 2005, Douglas Westwood estimated that the world marine tourism market was worth €168 billion. This figure is approximately 11% of total tourism revenues globally (€1,523 billion). In 2005, the European marine tourism market was valued at €72 billion (Douglas Westwood, 2004) and it was estimated to grow at 3% to €393 billion from 2005 to 2009. In 2004, the forecast recorded for world international tourist arrivals suggests a 4.1% annual growth rate from 1995 through to 2020. Europe's growth rate is lower at 3% over the same period. Applying this same percentage growth to marine tourism suggests a market value of €198 billion in 2009 alone (Douglas Westwood, 2005). However, since 2007 there has been a slowdown in the global economy and in 2008 all major industries, financial institutions and householders have suffered the impact of falling visitor numbers as a result of property value declines, rising oil prices, the banking crisis and security issues. It is therefore reasonable to assume that the tourism industry and marine tourism sector will suffer over the next few years and growth rates may not be as strong as anticipated in the 2005 Douglas Westwood Global Marine Tourism Report.

1.6 Ireland's Marine Tourism Sector

Ireland's water assets consist of 900,000 sq. km of marine resource compared to 90,000 sq. km of land resource. The marine/water-based tourism and leisure sector has the potential to be one of Ireland's major indigenous industries, which is based on key natural resources consisting of 4,000 miles of high quality coastal waters, 4,000 lakes, 75 major river catchments and over 450 miles of navigable inland waterways (Marine Institute, 2007).

Ireland's ocean economy consists of a diverse set of companies with a combined annual turnover of more than €3 billion employing nearly 22,000 people directly and another 22,000 people indirectly (Marine Institute, 2006). Nearly two thirds of the total annual turnover of €3 billion is contributed by Marine Services companies – a sub sector dominated by shipping and maritime

transport firms, but also including a significant contribution from businesses involved in marine and water-based tourism and leisure (Shields, O'Connor, O'Leary, 2005). The National Spatial Strategy 2002-2020 has identified the development of marine and natural resource-based industries as critical to the future prosperity of coastal areas where there are few alternative industries.

It is a widely held belief that the rural tourism and hospitality sectors are dominated by small family and owner-operated businesses (Getz and Carlsen, 2000). Small rural tourism businesses predominate in emerging sectors such as nature tourism (McKercher, 1998) and most of these are run by owner-operators and families. In 2005, it was found that over 46% of all small service enterprises in Ireland were small family owned businesses that generated €31.5 billion in turnover and employed almost 190,000 people (CSO, 2008). These family owned businesses accounted for 39% of turnover and 50% of persons engaged in the small services sector (CSO, 2008).

From a consumer perspective, despite a continued growth in tourism nationally, the regional share of visitor numbers has declined (Irish Regions, 2008). This decline can be attributed to the growing popularity of short-break urban holidays, and the significant expansion of low cost air access to the main cities. On the other hand, water-based tourism participants are broadly considered to be dominated by relatively high spenders and they also contribute to economic development on a regionally dispersed basis (Economic Social Research Institute, 2005 and ISMS, Irish Sea Marine Sector, 2007). The growing demand for active marine leisure activities such as surfing, rather than passive recreational activities such as visiting an aquarium, and the focus on health, leisure and improved lifestyles have combined to put marine tourism on the brink of rapid expansion (Ginty, 2007 and Marine Institute 2005).

Finally, the West Region of Ireland marine tourism natural assets include clean sandy beaches, rocky shorelines, sea cliffs, islands, scenic walks and inland waterways and rivers that are suitable for a variety of water based tourism and leisure activities. In addition, a proportion of the West Region is designated as nature reserves, such as Connemara National Park (2,699 ha). The image of these resources is unspoilt and unpolluted, however it is also under-developed from a tourism perspective. Clearly, Ireland's waters both inland and offshore are an important untapped natural resource that presents many opportunities and challenges which require research, long term planning and investment to fully utilise their potential.

1.7 Thesis Structure

In its presentation, this thesis reflects the process of the research. It starts with an extensive literature review in Chapter Two to Chapter Four. Chapter Two examines the business of tourism, in particular the role of small tourism businesses and the market performance of the tourism industry from an international, a national and a regional perspective. A range of tourism

economic models are also discussed which focus on the social and economic impact of tourism businesses and resources from a national or regional context.

In Chapter Three, the literature specifically focuses on the evolution of marine tourism. This Chapter explores marine tourism definitions and the historical development of this market. The range of water-based visitor products is also discussed, and the marine tourist's characteristics and their motivations behind choosing one activity over another. The literature review concludes in Chapter Four with a comprehensive review of the marine tourism sector in Ireland and more specifically the West of Ireland. An integral part of this Chapter is the performance of the marine tourism product offerings from a national and regional perspective.

From the literature review three key themes emerged in the evaluation of the marine tourism business sector comprising of the marine tourism product, the marine tourist, and policies related to investment and development in marine tourism. From this a research framework entitled '*The 3P's Marine Tourism Business Sector Evaluation Model*' was proposed. The methodology (Chapter Five) explains and justifies the approaches taken to the collection of data and information on marine tourism operators and associates in the West of Ireland. It also addresses the key limitations presented to the researcher during the administration of this study such as the validity of leisure and tourism data can rarely be as certain as in the natural sciences. With regards reliability, as this is a business research study it deals with marine tourism business managers/owners in differing and ever-changing social and economic situations. While an individual person's report of his or her behaviour or business performance may be accurate, when it is aggregated with information from other people from other businesses, it presents a snap-shot picture of a group of marine tourism businesses for a particular financial year, which is subject to change over time, as the composition of the business group change, or as some members of the business group change their patterns of behaviour.

Chapter Six presents the primary research findings from the marine tourism business sector in the West of Ireland. This Chapter focuses on a water-based visitor profile and the product providers' (i.e. marine tourism operators and associate businesses) performance and capabilities. A business case study is also presented on a seaside town, Roundstone, Co. Galway, in the West of Ireland. The findings in Chapter Six provide an understanding of the marine tourism business sector in the region, which connects with the '3P's Model' that emerged from the literature review and includes: product marketing, business finance, the customers, and the challenges facing the businesses operating in the marine tourism sector. Finally, this Chapter outlines an estimated economic impact assessment of the marine tourism operator businesses, which despite such limitations mentioned above, presents estimated values and demonstrates the potential for developing the marine tourism sector in the region. The findings from this Chapter as a whole provide key insights into marine tourism business operations in the West and an outline of the possible future values and overall contribution of the sector to the West of Ireland's regional economy.

Following this, Chapter Seven presents a document analysis of policy findings specifically related to the West of Ireland including a mix of marine tourism strategies proposed for the region by government bodies from 2002 up to 2012. In particular this Chapter has highlighted the level of 'aspirational statements' put forward by policy providers in relation to marine tourism, versus 'actual policies that have been implemented' from 2002 – 2007. The analysis concludes with the 2012 vision based on Fáilte Ireland's (the national tourism body) regional tourism development plan (Fáilte Ireland, 2008) and pinpoints linkages to the marine tourism business sector development needs.

Chapter Eight concludes and draws together the findings derived from 'The 3P's Marine Tourism Business Sector Evaluation Model', highlighting a series of product, person and policy recommendations and the potential areas for further research and investigation. This Chapter also discusses the original contributions and the practical outcomes that this research study has provided. Finally a reflective piece is presented which explores the researcher's journey while undertaking the PhD study.

CHAPTER 2 THE BUSINESS OF TOURISM

2.1 Introduction

Tourism is one of the most remarkable economic and social phenomena of the past century with continuous strong growth since the 1950s. International arrivals in the 1950s were 25 million and this grew in 2006 to over 800 million and in 2007 it reached 908 million. Tourism is therefore regarded as the world's largest and fastest growing industry and for many countries it is the major contributor to economic growth and employment (Holloway and Taylor 2006). The economic significance of tourism is determined not only by the level of tourism activity that is taking place, but also by the type and nature of the economy being considered (Cooper, 1998). It is the small tourism businesses that drive the economic benefits of tourism. Foreign exchange earnings, income and employment generation are the major motivations for including tourism as part of a development strategy (Bull, 1995).

The tourism industry recorded an average annual growth rate of 6.5% globally from 2002 to 2006 (UNWTO 2006). In 2006, World Tourism Organisation (UNWTO) forecasted that international arrivals will reach 1,600 million by 2020 due to the growing Gross Domestic Product (GDP) in key originating markets. Growth from 2002-2006 is attributed to the disposable incomes of consumers; the growing population seeking to maximise its use of available leisure time; affordable air travel; easy access to the internet and the capacity of individuals to design and book their own holidays; and the growth in the number of older people who have the time and propensity to travel (see Cooper 2005; Fletcher et al, 2005; Fáilte Ireland 2007).

In mid 2008, tourism growth rates fell as a result of the global economy entering a recession and this has created many challenges for the small and micro businesses that drive the tourism industry. However, Aramberri (2009) reports that in Modern Mass Tourism (MMT), tourism businesses can expect that barring massive crises, whether environmental, economic, political, or health related, people will want to travel in increasing numbers, and that in the 10-15 year range tourism will be similar to what is known now but bigger.

This Chapter provides an understanding of the tourism industry and particularly the important role small tourism businesses play. It also examines the economic significance of tourism as well as the economic impacts associated with the industry. An integral part of this Chapter is an assessment of the models and methods of measuring the economic impact of tourism. Finally the performance of the tourism industry is discussed from an international, national and regional perspective.

2.2 Tourism

2.2.1 Tourism Defined

Dictionary meanings of the term 'tourist' have been expanded and complicated with the rise of tourism research. One of the earliest definitions of tourism was provided by Ludwig in 1910, an Austrian economist, who defined it as *"the total of operators, mainly of an economic nature, which directly relate to the entry, stay and movement of foreigners inside and outside a certain country, city or a region"*. Ogilvie (1933) was one of the first to further develop this definition through using it in social science research. He described a tourist as any person whose movements fulfil two conditions:

1. That the person's absence from home was for a relatively short period;
2. That money spent during absence was money derived from home and not earned in the destination visited.

Cohen (1974) commented that Ogilvie's definition translates the contention found in other definitions, namely that the tourist is a traveller for recreation or pleasure. In economic terms the tourist is a consumer and not a producer. In his analysis of definitions, Frechtling (1976) outlined four basic criteria used in their formulation:

1. purpose of trip;
2. mode of transportation used;
3. length of stay;
4. distance travelled.

Other earlier attempts to define tourism, was that of Professors Hunziker and Krapf of Berne University, in 1943. They argued that tourism should be defined as 'the sum of the phenomena and relationships arising from the travel and stay of non-residents, in so far as they do not lead to permanent residence and are not connected to any earning activity. Holloway and Taylor (2006) state that this definition helps distinguish tourism from migration, but it makes the assumption that both travel and stay are necessary for tourism, therefore precluding day tours. It would also appear to exclude business travel, which is connected with earnings, even if that income is not earned in the destination country. Moreover, distinguishing between business and leisure tourism is in many cases extremely difficult, since most business trips will combine elements of leisure activity.

Other definitions such as that put forward by the United States, National Resources Review Commission in 1973 established that a domestic tourist would be 'one who travels at least 50 miles (one way)'. This focus on the distance of travel was confirmed by the US Census Bureau, which defined tourism eleven years later as a round trip of at least 100 miles. However, the Canadian Government defines it as a journey of at least 25 miles from the boundaries of the tourist's home community, while the English Tourism Council proposed a measure of not less

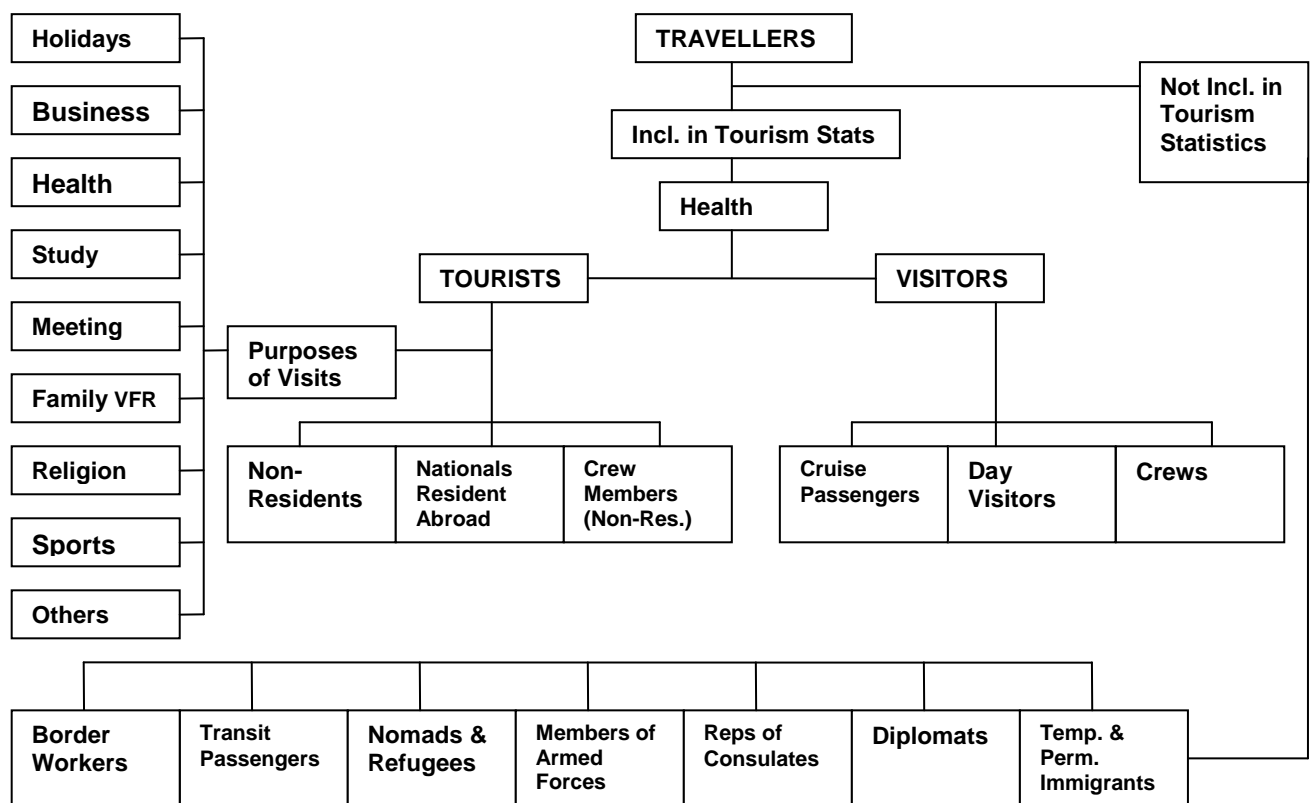
than 20 miles and 3 hours journey time away from home to constitute a leisure trip, so consistency has by no means yet been achieved.

In 1976 a working party for the proposed Institute of Tourism in Britain (which later became the Tourism Society) attempted to include the domestic visitor in their definition, and reported that tourism is the temporary short-term movement of people to destinations outside the places where they normally live and work, and activities during their stay at these destinations; it includes movement for all purposes, as well as day visits or excursions. This broader definition was rephrased at the International Conference on Leisure-Recreation-Tourism, organised by the AIAEST and the Tourism Society in Cardiff in 1981; Tourism may be defined in terms of particular activities selected by choice and undertaken outside the home environment. Tourism may or may not involve an overnight stay away from the home.

According to Gilbert (1990) what makes tourism difficult to define is the very broad nature of both the concept as well as the need for so many service inputs. Tourism is travel for predominantly recreational or leisure purposes or the provision of services to support this leisure travel. Tourists can be classified as temporary visitors spending time in a destination away from their home for leisure (recreation, health, sport, holiday, study or religion) or business, family, mission or meeting purposes (UNWTO, 1963).

The definition that describes tourism best was put forward by World Tourism Organisation (UNWTO) in 1993, who defined tourists as people who travel to and stay in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited. In other words, a tourist is a person who goes to another place for private interest or who is sent there (for example by a company), but is not employed at this place. Business tourists may go to this place for a conference, a workshop or further education. Private tourists may go there for adventure, recreation, education, pilgrimage or other purposes. Figure 2.1 illustrates the guidelines produced by the UNWTO to classify travellers for statistical purposes.

Figure 2.1 Defining a Tourist



VFR=Visiting Friends and Family

Source: UN World Tourism Organisation, 1995.

2.2.2 The Tourism Product and Consumer Decision Making

Tourists choose where to go, how long to go, who to go with, what to do, and how much to spend. These choices are interdependent (Lyons, Mayor and Tol, 2009). The literature on tourism and destination choice is wide ranging. This section focuses specifically on tourism product characteristics and how consumers choose a destination or tourism product.

In recent years the consumer has become more demanding and well travelled and this has put pressure on the tourism industry to provide innovative products and high quality services. There are a number of characteristics noted in the literature on the tourism product (see Bull 1995, Guiney 2000, Hall and Page 2006, Halloway and Taylor 2006, Cooper, Fletcher, Fyall, Gilbert 1993, 1998, 2005). The first characteristic is that this is a service rather than a tangible good. The intangibility aspect is particularly challenging for businesses that market and sell tourism products. Essentially tourism operators are selling 'an experience' or 'a dream' with no 'trial offer'. For example the purchase of a package tour is a speculative investment, involving a high degree of trust on the part of the purchaser. The necessary element of trust is heightened by the development of sales via the Internet and the introduction of e-tickets/ticketless bookings for air travel.

A second and third characteristic of the tourism product is its complexity and interdependence; when tourists buy a package tour abroad, they are buying more than a simple collection of services, such as an airline seat, a hotel room, three meals a day, and the opportunity to sit on a sunny beach; they are also buying the temporary use of a strange environment, incorporating what may be, for them, novel geographical features – old world towns, tropical landscapes plus the culture and heritage of the region and other intangible benefits such as service, atmosphere and hospitality (Holloway and Taylor, 2006). The planning and anticipation of the holiday may be as much a part of its enjoyment as is the trip itself; recalling the experience later, and reviewing slides, videos or photos are further extensions of the experience. These are all part of the product, which is therefore a psychological as well as physical experience.

A fourth characteristic of tourism is its perishability and the fact that it cannot be brought to the consumer; rather the consumer must be brought to the product. In the short term, at least the supply of the product is fixed; the number of hotel rooms available at a particular destination cannot be varied to meet the changing demands of holidaymakers during the season. The unsold hotel room or aircraft seat cannot be stored for a later date or sale, as is the case with tangible products, but is lost forever.

A fifth characteristic identified in the literature is the concept of authenticity (Future Foundation Visit Scotland, 2005). Authenticity as a concept is nothing new (Brass, 2005; Chambers, 2005); destinations such as Australia, Canada and China are promoting authentic experiences. There is a growing desire to obtain experiences and products that are original and the real thing, not contaminated by being fake or impure. Writers such as, Plato (Guthrie, 1987), Dostoevsky (Stuchebrukhov, 2004), Freud (Gertner, 2000) and Baudrillard (1983) have all explored the concept of authenticity in order to understand its meaning in people's life. Boyle's (2004) appraisal of authenticity means that tourists are searching for a connection with something that is real, unsullied and rooted within the destination. Here, tourism destinations have an opportunity to create something real, what is termed 'a sense of place'. Yeoman (2006) and other researchers state that destinations which have no history, have no anniversaries or festivals to celebrate. It is a destination's image that is shaped by its history, which then creates its sense of place. It is a destination's food, people and places which make up its heritage and its character (Yeoman and McMahon-Beattie, 2006) and which thereby provide a destination with its own authenticity.

Why and how a tourist selects a particular destination is a crucial part of the study of tourism (Pizam and Mansfeld, 1999). In developing effective tourism marketing and communication strategies, understanding travellers' decision making and destination selection process is a critical factor (Baloglu, 1999). Research on decision making indicates that human information processing capacity is limited (March, 1997; Schwenk, 1984, 1988). Indeed, there is a rule of thumb, called the 'seven plus or minus two' rule, which says decision makers can, on average, assimilate only five to nine ideas before they are overwhelmed (Miller, 1956; Sauter 1997).

Information overload contributes to a breakdown in processing capability (Feldman and March, 1981). Categorisation is used as a simplification strategy because it minimises the number of product items without threatening mental representation (Soars, 2003).

There are a number of studies encountered in the literature which have examined why tourists select a particular destination or product, and various decision models have been proposed to explain the process such as the McFadden choice model (1981) and nested multinomial logit model (Lyons, Mayor and Tol, 2009). Consumer choices are driven by a range of personal and social circumstances which influences the types of holidays and leisure breaks they undertake (Hall and Page, 2006). Um and Crompton (1992) found that the final destination is selected through a so-called funnelling process. During the process, the initial consideration set, consisting of a large number of alternatives, is narrowed down to a relatively smaller number of alternatives in the late consideration set, then the final destination is chosen from the late consideration set. Therefore a tourist's destination choice is made by a three stage sequential process: a composition of awareness set, an evoked set, and a final choice. There are three types of criteria that affect this process: personal motivations (push factors), destination attributes (pull factors), and situational inhibitors (constraints). Push and pull factors play an important role in filtering the number of destinations in the initial stage (Botha et al., 1999; Crompton and Ankomah, 1993).

The literature revealed that image differentiates tourist destinations from each other and is an integral and influential part of the travellers' decision process (Baloglu and Brinberg, 1997). It is also true that people make decisions based on their perception of reality rather than reality itself (Luckett, Ganesh, and Gillett, 1999). Lim (1999) reported that a high proportion of all tourism studies support the hypothesis that tourism demand is positively related to income and negatively related to prices. Although these are considered significant factors affecting the decision to travel, other non-monetary factors such as climate, length of coastline can also be important (Lyons, Mayor and Tol, 2009). From 2000 to 2006, Lyons, Mayor and Tol analysed the travel choices of Irish tourists. In total some 55,000 holiday trips were observed. They found that destination characteristics such as temperature, GDP and coastline positively influence choice probabilities, while population density and distance have a negative effect on choice. While most effects are broadly constant regardless of the travel season, they found evidence of seasonal differences in preferences. In particular, precipitation has a negative effect in summer, but a positive effect in winter. The study also found that older people tend to avoid hot destinations, while families with young children prefer such holidays.

According to Cooper (2005), in a world of change one constant in the last thirty years has been the sustained growth and resilience of tourism both as an activity and an economic sector. Disruption to travel as a consequence of geopolitical tensions, economic downturns, environmental disasters and rising security costs will continue. It is the world and the consumer's expectations which will shape the future of tourism, and in order to recognise this, the starting point is understanding mega-trends in society and how they will shape and influence

the future consumer and therefore tourists (Yeoman and McMahon-Beattie 2005). A trend is defined as a development in time which can be identified in the past and is likely (with good reason) to continue in the future (Lohmann and Aderhold, 2000). Therefore, trends describe possible developments likely to come and therefore can be used as information input for business planning or policy development. Emerging trends (IPK 2004) in international customer profiles include; a more sophisticated and travel-savvy consumer, more frequent and shorter trips, a growing environmental consciousness and holiday destinations are now increasingly determined by activities, hobbies, interests and curiosity and a strong awareness of value.

In 2006, the WTO reported the major drivers of tourism growth globally have been; population demographics, economic growth, lifestyle changes, climate changes, education; and the increasing availability of affordable transportation, especially air travel. Medium and long-haul air travel has become significantly more affordable. Meanwhile, low-cost airlines have revolutionised short-haul journeys within North America, Europe, Australia and Asia. The impact of changing demographic trends is said to be one of the important drivers for new trends in consumer behaviour in most European countries (see Lind 2001, Smeral 2003, Wallace 1999). Two important demographic trends include an older growing society due to rising life expectancy and a declining number of children in many industrial countries combined with the dissolution of traditional family patterns (see Lind 2001, Wallace 1999, Schäfers 1995, and Horx 2002).

Another driver of new trends in consumer behaviour has been put forward by Nordstrom (2003), who argues in his international best selling book 'Karaoke Capitalism: Management for Mankind', that talent makes capital dance and competitive advantage comes from being different. *"Increasingly, difference comes from the way people think rather than what organisations make. Today, the only thing that makes capital dance is talent. In such times we cannot have business as usual – we need funky business. Whether you like it or not, we are all condemned to freedom – the freedom to choose"* (abstract from Nordstrom, 2003). Nordstrom's' views can be examined in relation to the tourism industry, where the consumer experience is very people intensive. Therefore customer service and the supply of a highly skilled and talented labour force will make a difference to a small or medium tourism business enterprise in achieving competitive advantage.

Ultimately the success of the tourism industry is driven by people, good products, business development and government policies. All of this is underpinned by research in order to succeed. The next section of this Chapter will explore the key characteristics of small tourism businesses, the important role they play and the challenges they face.

2.2.3 Small Tourism Business Characteristics

There is no simple or single definition that constitutes a small enterprise. The Bolton Report (1971) provided one of the earliest attempts to define small businesses. He suggested that a small enterprise was so if it met three criteria: independent (not part of a larger enterprise); managed in a professional manner (simple management structure); relatively small share of the market (the enterprise is a price taker rather than a price maker). Steinhoff (1974) echoed these attributes while also highlighting that the managers are usually the owners; the area of operation is mainly local, with the workers and owners living in one community, however the markets need not be local; the relative size of the firm within the industry must be small and this measure can be in terms of sales volume, number of employees or other significant comparisons (see Figure 2.3 types of tourism businesses/organisations).

These definitions are useful as they reflect many features of small enterprises in general. However, a more uniform definition has been adopted by the EU in 1996 and updated in 2004, where it considers there are three types of smaller enterprises: micro (<10 employees), small (<50 employees) and medium sized (<250 employees). These three sized groups make up what are termed small and medium sized enterprises (SMEs). Internationally there are a wide variety of definitions, for example the US or Canada defines an SME as one that employs fewer than 500 employees. In Ireland, a small business is defined as an enterprise which employs less than 50 people (CSO, 2008). This makes it difficult to compare SMEs across various countries (Carter and Jones-Evans, 2006). Therefore definitions such as Bolton or Steinhoff offer insights into the managerial and behavioural characteristics of smaller enterprises. However, such definitions cannot be easily generalised across industries and regions or countries.

Other than size it self, one factor that distinguishes smaller enterprises from their larger counterparts is the nature of the uncertainty they face. As smaller enterprises are often reliant upon a limited number of customers and have a limited product portfolio (Cosh and Hughes, 2000), they tend to be exposed to greater levels of uncertainty in their markets. In contrast, larger enterprises are able to limit the uncertainty in their markets simply because they have diversified product portfolios (Carter and Jones-Evans 2006).

Small enterprises in the tourism and hospitality sectors encompass many micro-businesses, part-time operations, and types of business which do not necessarily require large initial investments (Getz and Carlsen, 2000). Bolin and Greenwood (2003) explain the term 'micro business' has been used to describe businesses with less than four employees. Within the tourism small or micro business literature, a number of themes and issues have been identified including owner operator characteristics, family life and gender issues within the small business, the motives for setting up the business, the rural environment in which they operate and the connections between the business and development, including sustainability issues.

Tourism offers many opportunities for small businesses. It is estimated that more than two and a half million small and medium enterprises (SMEs) are involved in the tourism industry in Europe (Middleton, 2001) with 81.5% of these actually falling into a micro category. The EU tourism industry is dominated by SMEs employing on average six people. There were 82,100 small enterprises engaged in the services sector in Ireland in 2005, an increase of 21,600 since the year 2000. Most of the services enterprises (88%) employed between 1 and 9 persons. Fáilte Ireland's Tourism Business and Employment Survey 2006 estimated the number of people employed in tourism and hospitality-related services was just over 249,000.

The tourism industry offers opportunities for relatively easy entry into a number of business types that specifically appeal to sole operators and families because of small size (resulting in lower capital and operating costs, or greater manageability by fewer people), desirable location, or connection with leisure and lifestyle preferences (Getz and Carlsen 2000). Shaw and Williams (1994) observed that noneconomic reasons existed for many tourism/hospitality owners entering business in UK coastal resorts. For example, they wanted to be self-employed, disliked their previous occupation, sought a better lifestyle, had personal reasons for making a change, or preferred the location (often after vacationing there).

It is a widely held belief that the rural tourism and hospitality sectors are dominated by small family and owner-operated businesses (Getz and Carlsen, 1999). Small rural tourism businesses predominate in emerging sectors such as nature tourism (McKercher, 1998) and most of these are run by owner-operators and families. In 2005, it was found that over 46% of all small service enterprises in Ireland were small family owned businesses that generated €31.5 billion in turnover and employed almost 190,000 people (CSO, 2008). These family owned businesses accounted for 39% of turnover and 50% of persons engaged in the small services sector (CSO, 2008). The literature on family businesses overlaps in many ways with that pertaining to small businesses, but there are a number of key differentiating components namely: ownership and control of the enterprise; motives and goals; involvement of family members; family business interdependencies, and generational transfer (Getz and Carlsen, 2000). In some cases businesses have been set up as a sideline or hobby, usually by females (Kousis, 1989; Lynch, 1996; Oppermann, 1997). Another major goal is that of experiencing a desired lifestyle, and McKercher (1998) states that this applies to many nature tour operators in Australia.

There is a growing body of literature and empirical studies into small tourism business entrepreneurship and motivations which enables a degree of insight into the lifestyle considerations of small business operators. For example a study of small tourism businesses in Victoria, Australia, Bransgrove and King (1996) found that the top goals of owners/managers were challenge/stimulus, business opportunity, lifestyle, and long term financial gain (accounting for 18-24% each). But lifestyle goals were twice as frequent in rural areas. Other rural tourism researchers have pointed to the goals or rewards of improved social lives (Pearce, 1990; Frater, 1982), and social standing (Pearce, 1990). Getz and Carlson (2000) state that setting up a tourism

business by a family or individual is perceived as a tool to achieve a lifestyle aim, but it is also likely that some families and other owner operators have a lifelong interest which leads them into the variety of sectors in the tourism industry. A study conducted in rural Western Australia by Getz and Carlsen (2000) examined goals of family and owner-operated businesses in the rural tourism and hospitality sectors. The most striking results in relation to start-up goals are that living in the right environment (mean= 4.51, out of 5) and enjoying a good lifestyle (4.37) are the strongest goals by far. The lowest ranked goals perceived to be “not important at all” were to “to gain prestige” and “to make lots of money”.

A recurring theme in tourism businesses is the idea that non-economic attributes including lifestyle values, motivations and aspirations are balanced with and sometimes take precedence over economic goals (Goulding, Baum and Morrison 2004). Shaw and Williams' (1997) study of English seaside resorts encapsulates many of the themes including ownership and business size attributes, in-migration motivations by entrepreneurs and those relating to their past employment history (escape, redundancy, dissatisfaction), improved living environments and less specific family or personal reasons. Their findings echo previous generic studies by Scase and Goffee (1984) and Storey (1994) on the breadth and complexity of entrepreneurial versus lifestyle motivations.

Other factors driving tourism business development include global environmental factors such as fish stock declines. For example a study conducted by Stead (2005) demonstrated how coastal areas in Scotland (including Shetland Islands and North East region) that are socio-economically dependent on marine capture fisheries, are now working towards long-term sustainable community development. Traditional fishermen or women in these coastal areas are now motivated to diversify from fishing into other sectors, particularly leisure, marine aquaculture and eco-tourism, while still keeping their 'lifestyle' association with the sea. There are similar projects in Europe such as the INTERREG funded programme called 'SEAWO-MAN' in Galicia in Northern Spain, which has succeeded in redeploying fishermen and women through re-training and re-developing harbours and coastal amenities to focus on marine leisure enterprises. Another scheme in Ireland, called the PESCA community initiative was set up in 1994 and ran until December 1999. The aim of the scheme was to help the fisheries sector adjust to structural changes by providing aid for the redeployment of the workforce and diversification into other activities such as supporting the set up of sea angling businesses and marine tourism tour boats.

Defining rural tourism has been a difficult challenge by researchers. Keane (1992) acknowledges that there are a variety of terms used to describe tourism activity in rural areas including agritourism, farm tourism, rural tourism, soft tourism, alternative tourism and many others which have different meanings from one country to another. Such a definition does little to convey the true meaning of tourism in rural areas because of the difficulty of establishing what is 'rural'. Lane (1994) cites a number of reasons why it is difficult to produce a complex definition of rural tourism to apply in all contexts. For example rural tourism is a complex multi-faceted activity. It includes farm based holidays but also comprises special interest nature holidays and

ecotourism, walking, climbing and riding holidays, adventure, sport and health tourism, hunting and angling, educational travel, arts and heritage tourism, and, in some areas, ethnic tourism. Lane (1994) also highlights rural areas themselves are in a complex process of change. With the impact of global markets, communications have changed market conditions and orientations for traditional products. Also the rise of environmentalism has led to increasing control by outsiders over land use and resource development. Some areas have experienced an inflow of people to retire or to develop new non traditional businesses (Lane 1994).

It is widely acknowledged that small and medium-sized enterprises in a rural environment make an important contribution to a region's success (Burns and Dewhurst, 1986) in terms of employment generation (Birch, 1979; Bannock and Daly, 1990), wealth creation (Daly et al, 1991) and social inclusion (Curran, 1986; PAT3, Social Exclusion Report). The relative contribution of businesses of different age on the economy has generated a longstanding debate. Some authors claim that it is the new businesses that create a disproportionate impact on new jobs and economic growth (Birch, 1979). Others (ACOST, 1990; Storey, 1994) argue that it is the mature businesses that afford the most important contribution to the vitality of the region.

Tourism is one of the most labour intensive industries, so it has the potential to contribute towards job creation and economic development in rural areas. However, there has been a tendency for small rural businesses to develop in an *ad hoc* manner, with little or no meaningful strategy (Hall, Kirkpatrick and Mitchell, 2005). This has resulted in many structural and product problems facing the rural tourism providers such as limited knowledge of the markets they work within and limited development of cooperation and marketing networks (Jenkins and Parrott, 1997). Other business issues and challenges common to small tourism businesses operating in rural environments include seasonality. As an endemic market phenomenon in many tourism destinations (Allcock, 1995; Butler, 2001), seasonality is commonly held to characterise sub-optimal utilisation of economic resources over a part of the year, to discourage inward investment in an area's tourism superstructures, to limit operators' propensity to upgrade their facilities and in certain cases can act as an impediment to labour force recruitment, retention and development (Krakover, 2000; Lundtorp et al., 2001) either in tourism or in other economic sectors competing with tourism (Bull, 1995) such as agriculture D'Amore (1976, as cited by Allcock 1995:57). Public sector intervention is common in many markets as a route to combating seasonality. This is especially so in economically peripheral areas which have few productive opportunities, as illustrated by Baum and Hagen (1999) and Wanhill (1997) in northwest Europe and the North Atlantic margins.

In Ireland, tourism seasonality persists (Kennedy and Deegan, 2001) and key policy goals (Fáilte Ireland, 2008) give priority to lengthening the season and encouraging 'out of season' activities. Fáilte Ireland have demonstrated their support for running 'festivals and events' in low season to drive visitor numbers into rural or remote areas. An example includes sporting events such as the 'International Connemara Marathon' which takes place in March in the West of Ireland. In the case of Otago in southern New Zealand, sports policy has been used to impact on seasonal

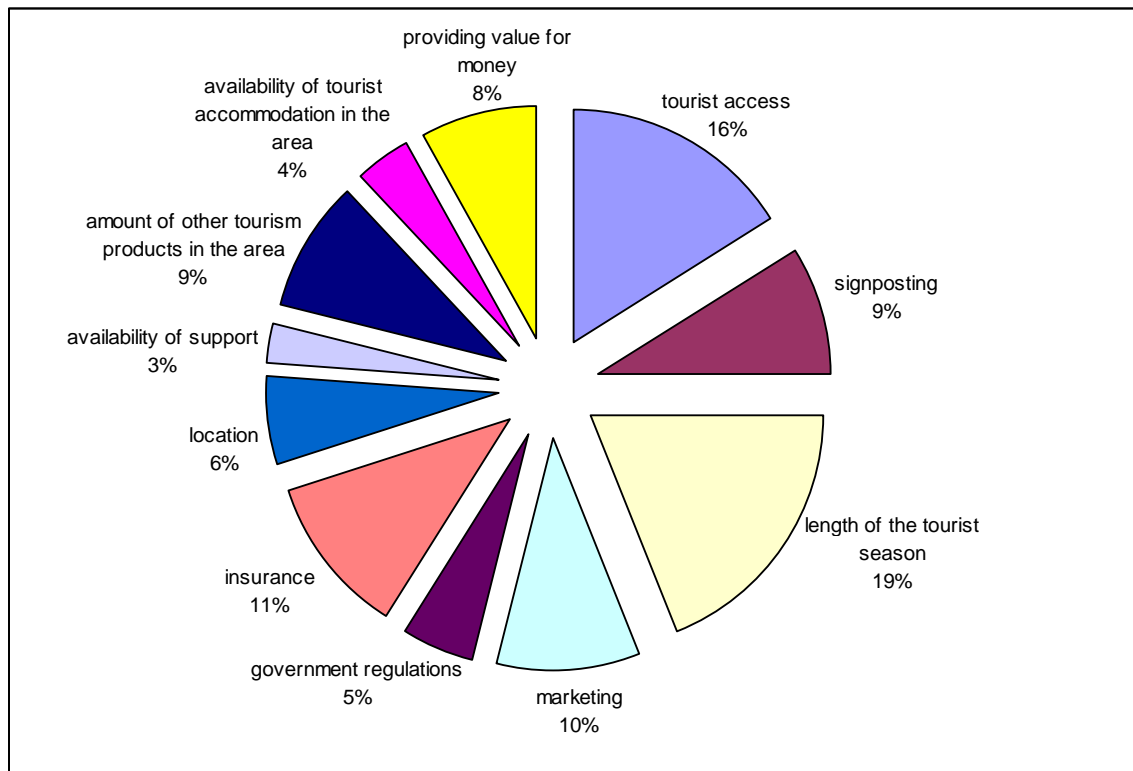
tourism patterns (Higham and Hinch, 2002). This has included restructuring the rugby union fixtures which has had positive outcomes for the area's tourism economy. Other strategies for extending the tourism season particularly in rural or remote locations put forward by Page and Getz (1997) include new product development (especially all-year sports), price and packaging incentives, special events and segmented marketing. It is important to note some strategies might be resisted by communities which value their peace and quiet most of the year.

A motivational and behavioural survey of seasonally trading tourism business proprietors in Scotland reveals a complex mix of factors influencing or determining the temporal pattern of trading, far wider than the dictates of consumer demand. Goulding (2006) presents a motivational paradigm for seasonal trading in the context that supply-side focused approaches to examining seasonality are as valid as conventional demand-side approaches to gain a real understanding of the total dynamic of a seasonal tourism economy. Butler's (2001) conceptualisation of influences on seasonality encompasses a broad range of 'supply attributes' including climatic conditions, which in turn are modified by a range of 'actions' such as pricing, taxation and investment. To these, Baum and Hagen (1999) add competition from other economic sectors and the alternative use of touristic resources as supply-side constraints. Goulding (2006) argues wider distributional and infrastructural elements such as transport and travel trade components must also be included as supply-side influences on tourism seasonality.

At a 'micro' or individual business level, the range of supply-side factors influencing seasonal trading patterns is wide. For example, local labour conditions can affect seasonal trading (Goulding, 2006). Baum and Hagen (1999) highlighted the degree to which the Swedish island of Gotland's tourism economy largely shuts down at the start of the academic year because of its dependence on seasonal student labour. Meanwhile Goulding and Gunn's (2000) exploratory study of seasonal trading of tourism businesses in the Scottish Borders revealed a number of other influencing factors which were noted to have distinct linkages with 'lifestyle entrepreneurship' as discussed earlier.

Other issues reviewed in the literature of tourism businesses operating in rural or remote environments include infrastructure. For example insufficient electrical or water supply, poor roads, communication and technology systems. This can be a welcome to some tourists who are seeking a true 'getaway' or it can be an obstacle to growth. A study undertaken by Price in 2007 examined out of a list of eleven options, the greatest barriers to the successful development of tourism businesses in the West and North West of Ireland. Figure 2.3 illustrates the results, indicating the percentage of entrepreneurs ranking access and the length of the tourist season as the greatest constraint to the development of their business. Costs can also be much higher in rural areas, and especially in remoter areas. Availability of insurance at low cost is a common problem. To a large extent the additional costs of operating rural tourism businesses are passed onto tourists, making many rural tourism experiences expensive.

Figure 2.2: Greatest constraints to the successful development of tourism enterprises

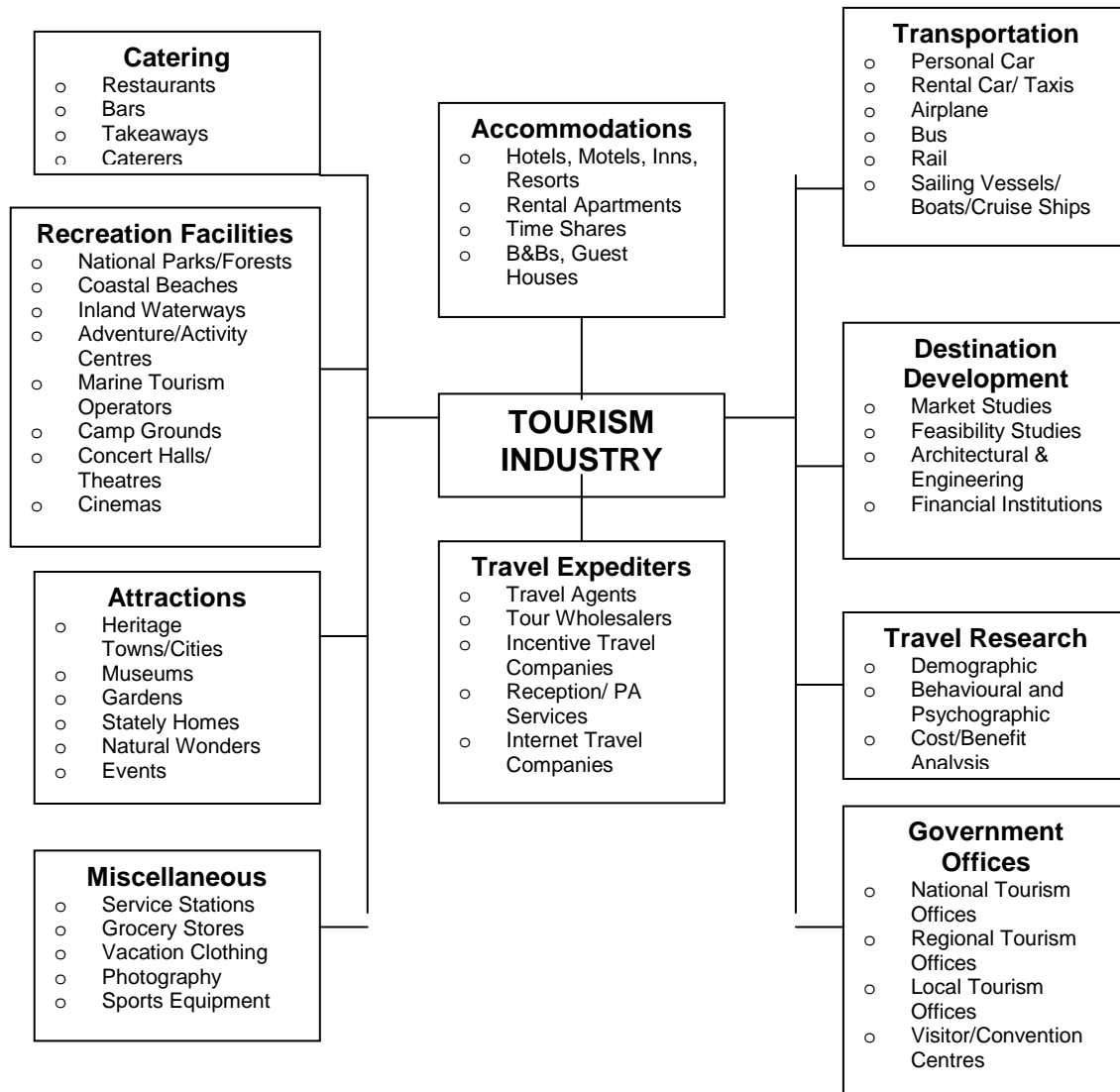


Source: Price, 2007.

Finally, obtaining finance for tourism and hospitality projects is often difficult in rural areas this is normally compounded by several factors: absence of wealthy residents; inadequate infrastructure (such as fire or police that give security to investments); absence of lending institutions (which often have an urban bias); lack of collateral (especially in depressed areas where, for example, land prices have fallen); and resource-poor public authorities (Page and Getz, 1997). This is one reason why rural tourism business financial assistance programmes have been set up to help overcome their weaknesses. Chapter Seven will present findings from a document analysis on tourism government body support provided to the marine tourism business sector in the West of Ireland.

The next section of this Chapter discusses the literature on economics of tourism and how tourists, tourism resources, or tourism businesses economic contributions are assessed on a national or regional level.

Figure 2.3: Tourism Industry



Source: Adopted from Lundberg, Stavenga and Krishnamoorthy 1996.

2.3 The Economics of Tourism

2.3.1 Understanding Tourism Economics

Economics is usually defined in terms of scarcity, a situation in which there is not enough of something to meet everyone's wants (Bull 1995). Modern economic thought originated with Adam Smith and his book *The Wealth of Nations* (1776). Smith's work creates the foundation for modern neo classical economics and the liberal market agenda. He presented the concepts of aggregate supply and demand, productivity growth over time, as well as the division of labour and the increase in productivity due to specialisation. French Economist T.B. Say, in 1803, generated the idea of the circular flow of income known as Say's Law. His theory suggested that in the economy as a whole production generates exactly the right amount of income to allow people to pay for the sale of all goods that have been produced. John Maynard Keynes on the other hand presented a new theory of aggregate demand in his 1936 book. Keynes suggested that increased government spending in the economy was necessary to support struggling economies. Keynesian policies can play a major role in neo classical economies, whereas Smith's policies continue to play a role in Western economies today.

Tourism economics measures the amount of travel and its economic consequences, direct, indirect, and induced. Definitions and methods of collecting travel information vary considerably and are evolving (Lundberg, Krishnamoorthy and Stavenga, 1995). The economic complexities of tourism include a micro and macro level. The micro level covers travel forecasting, tourism spending, and the costs and benefits for the bigger travel suppliers. On the other hand the macro level covers how countries and governments operate.

Mathieson and Wall (1982) describe the economic benefits of tourism to include the:

1. Foreign exchange earnings and the balance of payments;
2. The generation of income;
3. The generation of employment;
4. The improvement of economic structures;
5. The encouragement of entrepreneurial activity;
6. The stimulation of economies and the mitigation of regional economic disparities.

Much less is known about the economic costs of tourism than the benefits. Costs mentioned in the literature include the danger of overdependence on tourism, increased inflation and higher land values, an increased propensity to import, the seasonality of production and the low rate of return on investments and the creation of other external costs (Saayman and Saayman 2006, Mathieson and Wall 1982).

The magnitude of economic impacts is governed by a multitude of factors such as the level of economic development of the destination area and the volume and intensity of expenditures in the destination, which is a result of the length of the visitors stay, which strongly influenced by the amount of things to see and do in the area, i.e., events taking place, marine leisure activities, range of restaurants and bars. Other factors (Brown, Var and Lee 2002, Mathieson and Wall 1982) promoted are the nature of the main facility and its attractiveness to tourists and the degree in which the destination has adjusted to the seasonality of the tourist demand. These factors also determine whether the economic impact is predominantly positive or negative.

Economists such as Bull (1995), Fletcher et al, (2005), Deegan (2004) and Moloney (2006), focus on three parts when assessing the economic impact of tourism on a national or regional level. This is also known as a regional tourism multiplier process or national tourism multiplier process.

Part One - Direct, Indirect & Induced Effects;

Tourist expenditure has a cascading effect throughout the host economy. It begins with tourists' spending money in 'frontline' tourist establishments, such as hotels, restaurants and taxis, and then permeates throughout the rest of the economy. It can be examined by assessing the impact at three different levels; the direct, indirect and induced effects.

Therefore, the direct effect of any activity on its local economy can be quantified as:

- the numbers directly employed by the activity
- the wages and salaries these workers are paid
- the value of purchases directly attributable to the activity

Looking at the value of an activity in this sense, one can capture the minimum economic significance of the activity. Such an analysis excludes the linkages that a business activity has with other sectors of the economy. These linkages can be described in terms of indirect contributions. They support jobs and provide wages and salaries.

Using an Input-Output Model approach the overall impact of tourism activities may be separated into three parts as follows:

1. **Direct Impacts** give the total expenditure on the purchase of goods and services by tourist visiting a country or region. It includes the direct payment of wages and salaries of employees.
2. **Indirect Impacts** are those which occur when suppliers in receipt of expenditure, in turn purchase goods and services. This in turn results in further production and employment in businesses located in the country or region.
3. **Induced Impacts** refer to the additional consumer spending, which takes place when the income generated from the direct and indirect impacts is spent.

The overall impact is the sum of the direct, indirect and induced impacts. These impacts may be quantified in terms of expenditure and employment. This overall impact can then be measured as a multiple of the direct impact of business. Economic analysis reports present impact findings in

terms of two distinct types of contribution of the tourist industry on the economy of the region: the direct and secondary contributions. The indirect impacts and induced impacts are often termed the secondary impacts (Moloney 2005).

Part Two – Leakages;

An important concept in understanding economic activity in a national or regional economy is that of 'value add'. If the market values of all outputs of all firms was added up, the total would be in excess of the value of the economy's output (i.e. for example, take a local butchers total earnings and add the total value of the sales of the cattle farmer and the abattoir, the result would be counting the value of the meat three times). To avoid double counting it is necessary to include only final goods in Gross Domestic Product (GDP) and to exclude the intermediate goods that are used up in making final demand.

When tourists make expenditures within an economy the amount of money that stays within that economy depends upon the extent of leakages that occur (Fletcher et al, 2005 and Deegan 2004). For instance, in the case of tourism, if a tourist purchases 'a souvenir' in Galway that was made in Taiwan, the tourist is really only buying the value added that was created within the local economy, i.e. the value of local transport, import, wholesale and retail margins, Government taxes and duties. The extent of leakages can result from different demand-side factors such as the fact that different types of tourists and different types of tourist activity tend to be associated with differences in propensities to purchase imported goods. For example, some tourists may prefer to buy products made locally (local foods and clothing) whereas others may wish to buy international brands that are imported. The extent of leakages can be associated with supply-side factors, particularly in smaller geographical areas where the local capacity to supply the needs of tourists may be small and there is consequently a high proportion of demand met through imported goods and services.

Wherever money flows out of circulation, either by being spent on goods and services from outside or simply being withdrawn through savings, this constitutes a leakage. The essential point is that the lower the leakages the longer the tourist currency circulates within the local economy therefore creating greater additional income and employment for residents (Deegan and Moloney, 2005).

Part Three - The Multiplier Concept;

An integral part to the economic assessment exercise is an understanding of the multiplier concept developed by Keynes in the 1930's. The concept of the multiplier is based upon the recognition that sales from one firm require purchases from other firms within the local economy, i.e. the industrial sectors of an economy are interdependent. This means that firms purchase not only primary inputs such as labour and imports, but also intermediate goods and services produced by other establishments within the local economy. Because firms in the local economy are dependent upon other firms for their supplies, any change in tourist expenditure will bring about a change in the economy's level of production, household income, employment,

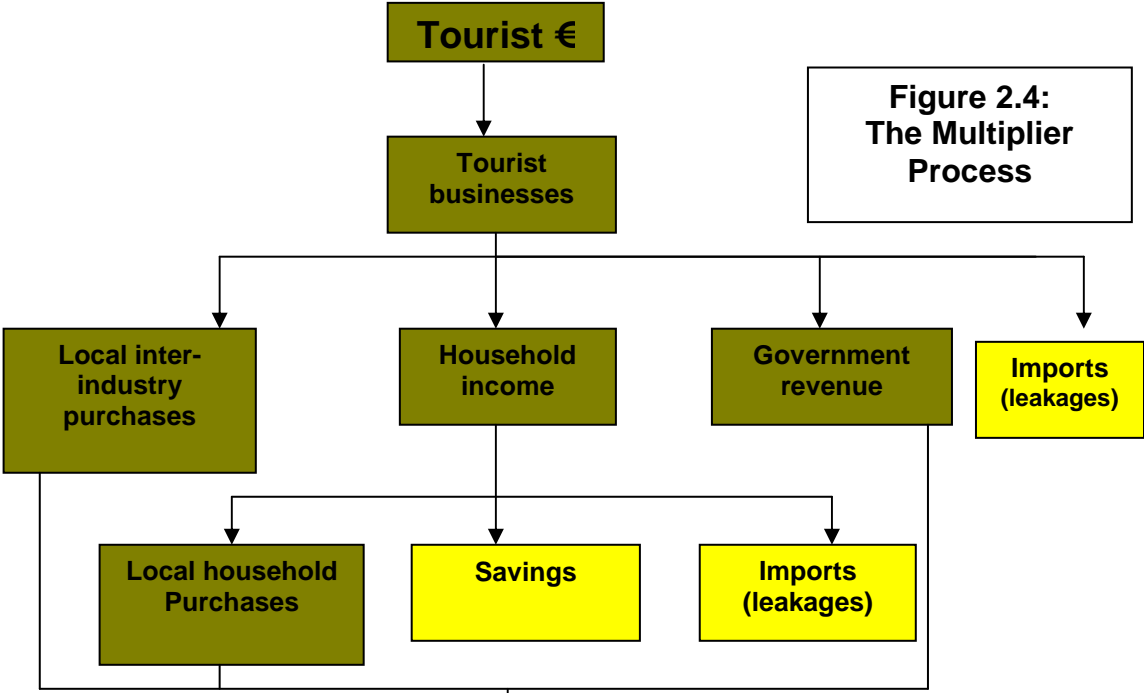
Government revenue and foreign exchange flows (where applicable). These changes may be greater than, equal to or less than the value of the change that brought them about.

The term 'tourist multiplier' refers to the ratio of two changes; the change in one of the key economic variables such as output (income, employment or Government revenue) to the change in tourist expenditure (Deegan and Moloney 2005) for example 'an income multiplier' measures the income generated by an extra unit of tourist expenditure. Confusion arises over the definition of income. Many researchers define income as disposable income accruing to households within the area, which is available for them to spend. However, although salaries paid to overseas residents are often excluded, a proportion of these salaries may be spent in the local area and should therefore be included. In considering national economies some studies include revenue accruing to the government in income. Multipliers can be further categorised by the geographical area which is covered by the research, such as a local community, a region within a country, or a country as a whole. The reason why the initial change in tourist spending must be subject to a multiplier effect can be seen from Figure 2.4, 'The Multiplier Process'.

Figure 2.4 shows that the tourist expenditure goes initially to the front-line tourist business establishments that provide the tourists with their goods and services. This money will be re-spent by the businesses that receive it. A proportion of the money will leak directly out of the economy in the form of imports and savings (the yellow boxes in Figure 2.4). These imports may be in the form of food and beverage that the tourist consumes but are not provided locally, or in respect of services provided to the establishment by individuals or firms located outside the economy/area being analysed. Where the tourist consumes a product that has been imported into the local economy, they are only consuming the value-added (distributive trade, transport, local taxes, etc.) rather than the full cost of the product. The money paid to persons outside the local economy cannot have any further role in generating economic activity within the local economy and, therefore, the value of tourist expenditure that actually circulates in the local economy is immediately reduced.

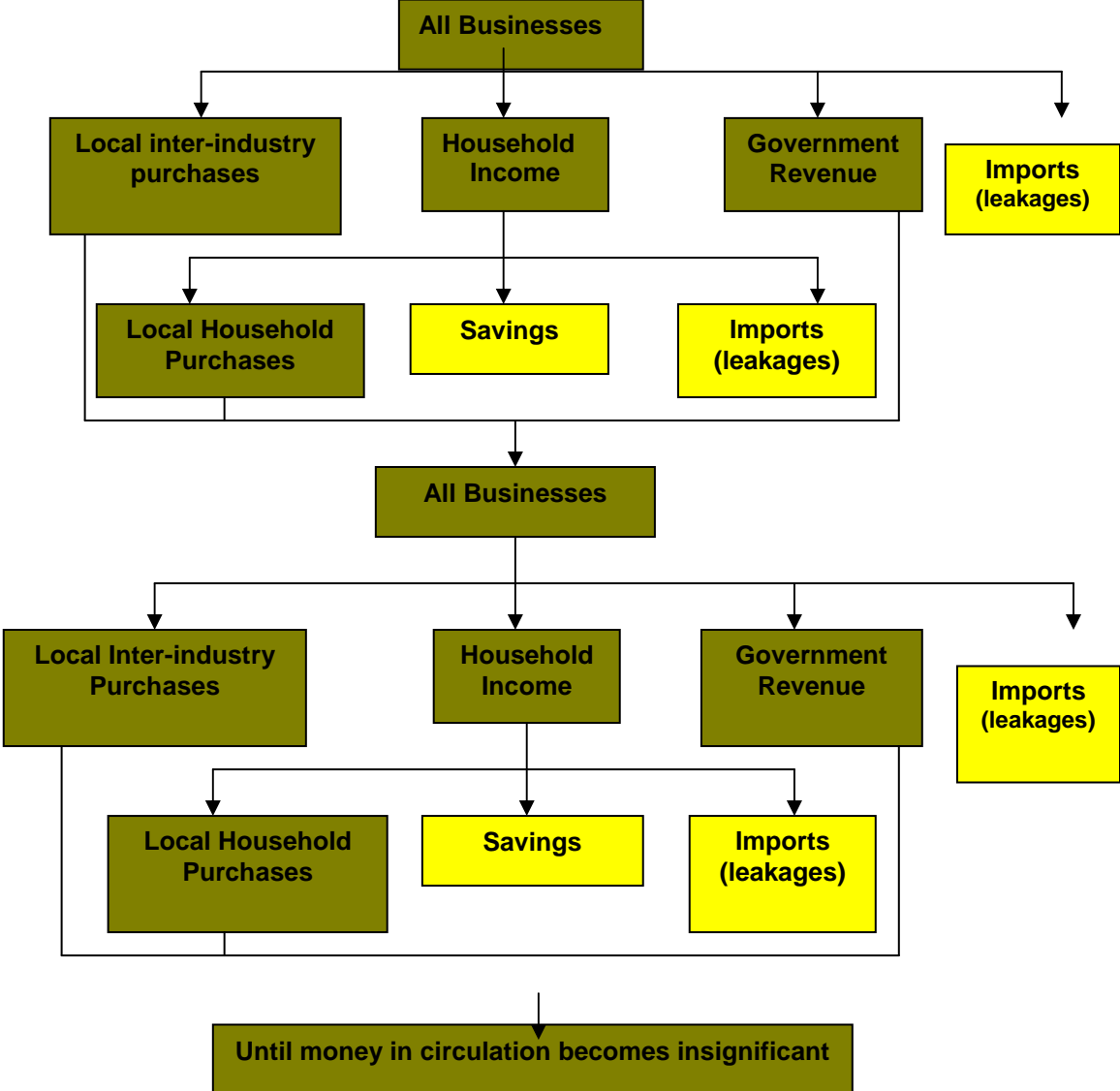
The remaining sum of money will be used to purchase locally produced goods and services, labour and entrepreneurial skills (wages, salaries, and profits) and to meet government taxes, licenses and fees. These effects are known as the 'Direct Effects' and are represented in the top third of the Figure 2.4. These direct effects are likely to be greater in more economically developed regions and in larger geographic areas (Cooper, Fletcher, Fyall, Gilbert and Wanhill, 2005).

D I R E C T
E F F E C T S



**Figure 2.4:
The Multiplier
Process**

I N D I R E C T
E F F E C T S



Until money in circulation becomes insignificant

Source: Adopted from Cooper, Fletcher, Fyall, Gilbert and Wanhill, 2005.

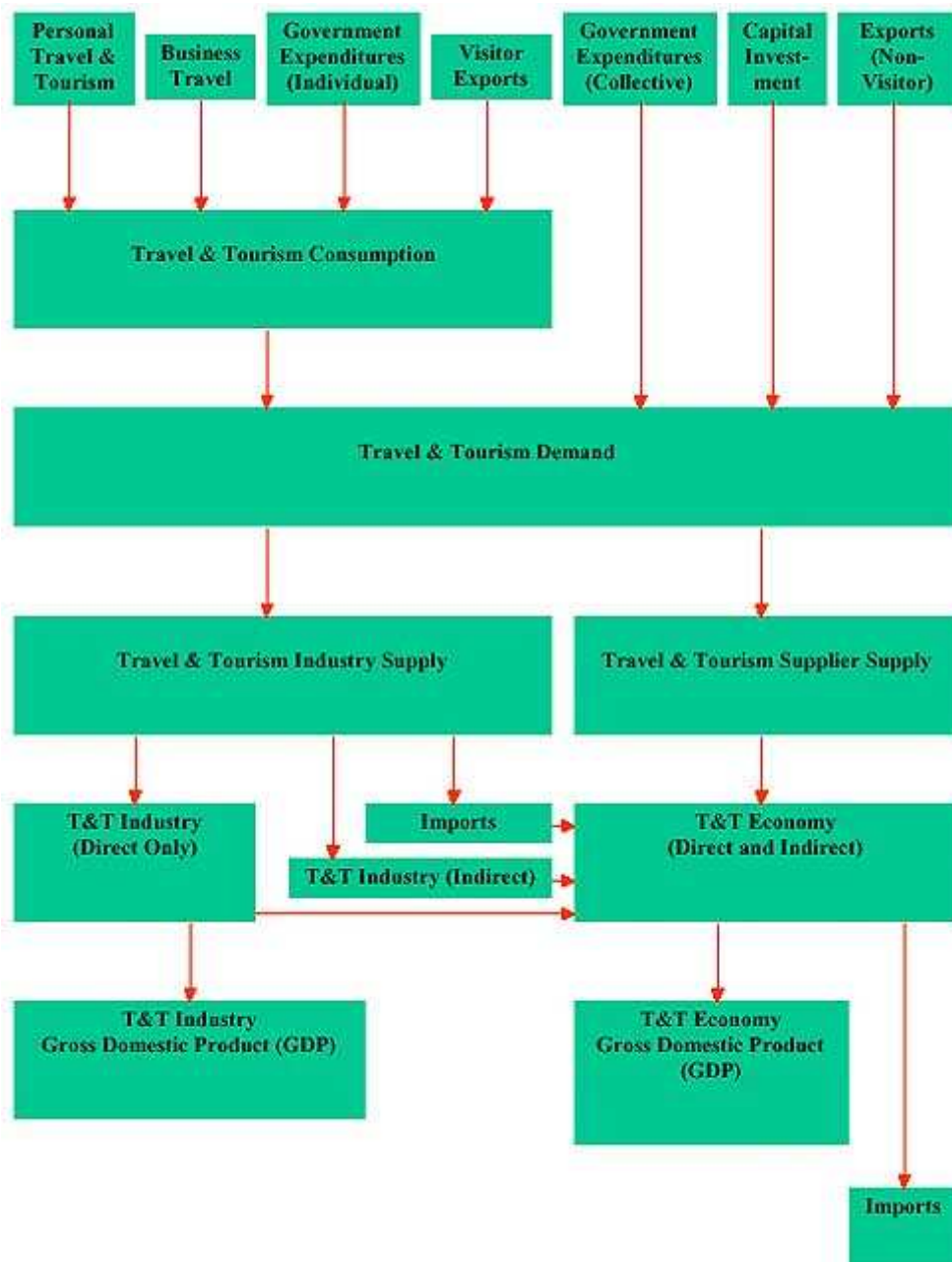
Also outlined in Figure 2.4, money flows from the tourism-related businesses to other local businesses. This money will also be re-spent, some of it leaking out as imports, some of it leaking out of circulation through savings and some going to the Government. The remainder is spent on labour and entrepreneurial skills and purchases from other businesses for goods and services. The businesses that receive money in payment for their goods/services will also make purchases locally, import goods and services and pay Government taxes. These effects are known as the indirect effects. During each round of expenditure, some proportion of money accrues to local residents in the form of income (wages, salaries, profits). Some of this money will be saved (by either households or businesses) and will cease to circulate in the economy, i.e. leakage. The income that accrues to local households and is not saved will be re-spent. This spending of income accrued as a result of the initial tourist expenditure will generate further rounds of economic activity, this effect is known as the induced effect and refers to 'Says Circular Flow' discussed earlier.

2.3.2 Tourism Economic Impact Models

There are a number of models and frameworks explored in the literature for evaluating the impact of the tourism industry on a national or a regional level, three examples have been selected from the literature for discussion including Tourism Satellite Accounts (TSAs), Input-Output Analysis and the STEAM Model.

The tourism industry has suffered for many years from the absence of a formalised and accepted methodological framework for the measurement of the economic impact of the collective consumption associated with the expenditure of tourists (Deegan and Moloney 2005). In April 2000 the United Nations Statistical Committee (UNSC), the OECD, Eurostat and the UNWTO approved a methodological framework for the economic measurement of tourism to be known as the Tourism Satellite Account (TSA). According to Deegan and Moloney (2005) and the UNWTO (2000), the TSA methodology provides an all embracing approach to estimating and examining the size of the tourism industry. The aims of the tourism satellite accounts strategy were outlined by the OECD and UNWTO (2000) to increase and improve knowledge of tourism's relationship to overall economic activity in a given country; to provide an auxiliary instrument for designing more efficient policies in specific areas; and to create awareness among the various players not directly involved with tourism, of the quantitative importance of this industry (in monetary and physical terms) and by extension its role as an important economic factor in all the industries that produce the goods and services demanded by visitors.

Figure: 2.5 The Flow Chart of a Standard Tourism Satellite Account



Source: Tourism Intelligence International, 2007.

Essentially, the TSA (see flowchart of TSA, Figure 2.5) outlines ten idealised tables that encompass a full TSA for any country. In the attempt to complete these tables it is recognised that individual countries will have different levels of sophistication in their national accounts and that the data collected on tourism will also vary. As a result, some countries will have good data from the national accounts and relatively poor tourism data whereas the converse may hold elsewhere. Nonetheless, the TSA framework is now the accepted benchmark and to facilitate the process the UNWTO has issued guidelines for all those who wish to embark on the construction of a TSA (UNWTO, 2000).

Tourism satellite accounts are now being formulated by countries across the world, in order to provide comparable measures of the size of tourism sectors, the nature of demand for tourism, the nature of supply in tourism sectors, and the direct contribution of tourism to GDP and employment. This makes an invaluable contribution to global knowledge of the tourism sector (Blake, Durbarry, Sinclair and Sugiyarto, 2001). The Canadian Tourism Commission (2004) describe the central idea behind the TSA framework as being to analyse in detail all aspects of the demand for goods and services that are consumed as part of tourism, and to measure the relationship with the supply of such goods and services within the same economy.

In 2005, Fáilte Ireland published the first Tourism Satellite Account for Ireland, developed by Deegan and Moloney. The Satellite Account for Ireland is an extension to a System of National Accounts (SNA) which enables an understanding of the size and role of economic activity in a sector such as tourism which is usually hidden. The TSA for Ireland is discussed in section 2.3.3. Finally, it is worth noting that a TSA is simply an account and as such it only reflects a static picture at a point in time. In order to fully understand the dynamic element associated with tourism in an economy (e.g. effects of changes in interest rates, exchange rates, price changes) it requires that Computable General Equilibrium¹ (CGE) models be constructed (Deegan and Moloney 2005).

In relation to an Input-Output model, Wassily Leontief (1905-1999) is credited with the development of this analysis. Leontief won a Bank of Sweden Prize in Economic Sciences in Memory of Alfred Nobel for his development of this model in 1973. Tourism impact models have traditionally relied on input-output (IO) modelling (see Archer, 1976; Fletcher and Archer, 1991; Pye and Lin, 1983). The Input-output model of economics uses a matrix representation of a nation's (or a region's) economy to predict the effect of changes in one industry on others and by consumers, government, and foreign suppliers on the economy. This model, if applied on a region is the same as the regional tourism multiplier process discussed earlier in this section Chapter Two. The purpose of the input-output model is to estimate the total impact of tourism on the country or a region. The starting point is the expenditure and employment that is directly related to tourism. Input-output is a method of measuring the overall impact of an industry or industrial service such as the tourist industry (Moloney 2005). An example of input-output economic impact analysis is presented in the Chapter Seven for the marine tourism operator sector in the West of Ireland. This analysis uses the Dutch developed IRIOS input-output software (2006). Methodological notes on the input-output process from Moloney (2008) are also presented in the appendices.

The data requirements for national economic input-output models are enormous because the expenditures and revenues of each branch of economic activity have to be represented. The input-output tool has languished because not all countries collect the required data, data quality varies, and the data collection and preparation process is slow which makes timely analysis

¹ CGE Models are constructed from a series of relationship equations that are compiled into social accounting matrices (Fletcher, 2005).

difficult (Vaughan, Farr, and Slee, 2000). Typically input-output tables are compiled retrospectively as a 'snapshot' cross-section of the economy, once every few years. There is currently no regional input-output model available in Ireland, however, since 2007 a PhD study is currently being undertaken by an ESRI staff member under the supervision of economist, Dr. Richard Moloney, UCC (University College Cork).

Finally the STEAM model known as the 'Scarborough Tourism Economic Activity Monitor' is derived from a model developed by James and Hart (1981) when they were in the process of developing a ten-year tourism policy for the province of Saskatchewan, Canada, in 1981. In 1985, following the establishment of Canada's National Task Force on Tourism Data, Messrs. Hart and James were appointed co-chairmen of the Working Party to consider Local Area Statistics. This work focused on the city of Edmonton, Alberta, Canada, and became the first attempt to develop the effective use of supply-side generated local area tourism statistics drawing on the model developed in Saskatchewan in 1981.

In 1988, James was appointed Director of Tourism and Amenities for Scarborough Borough Council and it was in that context that the Local Area Tourism Statistics model was transferred to the UK. The model was first run on behalf of Scarborough Borough Council in 1990. In 1991, the North Yorkshire County Council, together with the District Councils in the County, embarked on a pilot programme to evaluate the now-named 'Scarborough Tourism Economic Activity Monitor' (STEAM). At the same time, STEAM was adopted by a number of Local Authorities in England, Scotland and Wales. STEAM is not a statistically estimated model in the manner of an input-output model of the local economy. It is a spreadsheet model, which is more of a process in which the values of the relationships or equations defined on the spreadsheet are specified at each stage by the user. Thus, although the logic of the model is constant, the nature of data input will alter from area to area depending on the amount of survey material available and qualitative expert opinion concerning the structure of the tourism sector in the local economy.

STEAM approaches the measurement of tourism at the local level from the supply side (i.e. accommodation, attractions) and quantifies the local economic impact of tourism, from both stay and day visitors. This approach has the benefit of immediacy and relative inexpensiveness. The traditional measurement of tourism activity is from the demand side, but, as is well known, surveying visitors is both time-consuming and costly. This is further complicated when economic impact assessment is made, which requires surveys of businesses and the consumption patterns of local people. STEAM is not designed to provide a precise and accurate measurement of tourism in a local area, but rather to provide an indicative base for monitoring trends. The confidence level of the model is calculated to be within the ranges of plus or minus 10% in respect of the yearly outputs and plus or minus 5% in respect of trends.

Figure 2.6: STEAM Model

Cumbria STEAM Summary 2006

(All £'s 2006 indexed; RPI factor 05/06 + 1.0238)

Total Revenue by District (£'s millions)	2006	2005	% change
Allerdale Borough Council	194.7	196.5	-1
Barrow Borough Council	58.8	59.1	-0
Carlisle City Council	120.0	125.8	-5
Copeland Borough Council	89.6	88.2	2
Eden District Council	143.0	144.4	-1
South Lakeland District Council	467.8	471.0	-1
TOTAL	1073.9	1085.0	-1

Analysis by Sector of Expenditure (£'s millions)	2006	2005	% change
Accommodation	276.1	279.8	-1
Food and drink	168.2	169.4	-1
Recreation	55.5	55.9	-1
Shopping	85.8	86.8	-1
Transport	104.3	104.9	-1
Indirect Expenditure	263.3	266.2	-1
VAT	120.7	121.9	-1
TOTAL	1073.9	1085.0	-1

Revenue by Category of Visitor (£'s millions)	2006	2005	% change
Serviced Accommodation	421.6	427.4	-1
Non-Serviced Accommodation	321.2	324.2	-1
SFR	27.0	26.8	1
Day Visitors	304.1	306.6	-1
TOTAL	1073.9	1085.0	-1

Tourist Days (Millions)	2006	2005	% change
Serviced Accommodation	5.31	5.38	-1
Non-Serviced Accommodation	10.07	10.08	-0
SFR	1.90	1.88	1
Day Visitors	10.24	10.31	-1
TOTAL	27.51	27.66	-1

Tourist Numbers (Millions)	2006	2005	% change
Serviced Accommodation	2.66	2.68	-1
Non-Serviced Accommodation	1.51	1.52	-1
SFR	0.76	0.76	1
Day Visitors	10.24	10.31	-1
TOTAL	15.17	15.26	-1

Sectors in which Employment is supported (FTE's)	2006	2005	% change
Direct Employment			
Accommodation	9,905	9,897	0
Food & Drink	3,595	3,661	-2
Recreation	1,439	1,467	-2
Shopping	1,673	1,712	-2
Transport	996	1,013	-2
Total Direct Employment	17,607	17,750	-1
Indirect Employment	3,715	3,798	-2
TOTAL	21,322	21,548	-1

Source: Cumbria Tourism, UK, 2006.

The STEAM model is utilised annually by Cumbria Tourism in the UK (James, 1999). In 1999, a partnership of Cumbria Tourism, Cumbria's County and District Councils and the Lake District National Park Authority, first commissioned Global Tourism Solutions (UK) Ltd to estimate the economic impact of tourism in Cumbria using the STEAM Model. This economic impact assessment has taken place each year since then. Figure 2.6 outlines Cumbria STEAM model outputs. This model demonstrates tourism in Cumbria is worth £1.1bn to the local economy. In terms of district share, Barrow provides 5.5% of the county's tourism revenue, Copeland 8.3%, Carlisle 11.2%, Eden 13.3%, Allerdale 18.1% and South Lakeland 43.5%. The area covered by the Lake District National Park accounts for 5% of tourism revenue in Cumbria. Tourism activity and the consequent tourism revenue are subject to seasonal variations. Traditionally, destinations such as Cumbria have received the greatest proportion of visitors, and hence tourism revenue, during the six months from April to September. July to September is the most lucrative quarter of

the year, generating 36.4% of tourism revenue for Cumbria in 2006. A further example of the STEAM model can be found with East Midlands Tourism in the UK, where in 2005 they commissioned Global Tourism Solutions (UK) Ltd to assess the economic impact of tourism in the region using STEAM. The East Midlands in the UK believed that this method provided the most comprehensive review of the value, volume and economic impact of tourism in the region to date.

2.3.3 Practical Applications of Tourism Economic Assessment

During the literature review process, studies were identified that focused on the social and economic impact of tourism resources or assets in a national or regional context. Four examples have been selected for discussion including; beaches in the US, the Addo Elephant National Park in South Africa; Snowdonia National Park in Wales; and Malahide Marina in the East of Ireland. These studies represent a good mix of tourism resources or offerings similar to what can be found in the West of Ireland such as the Connemara National Park, the beaches and the range of adventure and marine tourism business providers. The studies discussed below provide some interesting examples and practical applications of the economic contribution of tourism assets to an area, region or country. This further demonstrates the tourism economic impact assessment methodologies outlined in section 2.3.2 of this Chapter.

In the case of beaches in the US, according to Houston (1996), travel and tourism is America's largest industry, employer, and earner of foreign exchange, and beaches are the largest factor in travel and tourism. Beaches receive more visits to all federal and state parks, recreational areas, and public lands (Houston, 2002). Beaches are the key element of US travel and tourism, because they are the leading tourist destination (Houston, 2002; Washingtonpost.com: Poll 2001). Coastal states receive about 85% of tourist related revenues in the United States largely because beaches are tremendously popular (World Almanac, 2001). It is estimated that each year approximately 180 million Americans make 2 billion visits to Ocean, Gulf, and inland beaches (Clean Beaches Council, 2001). For example, Miami Beach has almost twice as many tourist visits as the combined number of tourist visits to Yellowstone (3.4 million), the Grand Canyon (4.5 million), and Yosemite (3.4 million), (National Park Service, 2001). California beaches alone have more tourist visits (567 million) than combined tourist visits (286 million) to all 346 National Park Service properties (King 1999; National Park Service 2001; Bureau of Land Management 2001). A favourable climate plays a big role in driving visitor numbers to the beaches but also the investment in beach facilities encourages people to spend more time at the location and also influences repeat visits (Houston 1996).

King (1999) showed that California beach tourism makes a total direct and indirect contribution of \$73 billion to the national economy, more than five times the \$14.2 billion contribution of the National Park Service system (International Ecotourism Society, 2001). Similarly, beach tourism in Florida makes \$33.7 billion contribution to the national economy (Houston, 2002). King (1999) also reported the US Federal Government receives the lion's share of taxes from beach

tourist spending, for example in 1992 the US Travel and Tourism Administration estimated that beaches contributed about \$170 billion annually to the economy. These taxes are far greater than Federal expenditures on beach infrastructure such as beach nourishment. Houston (1996) cites beach nourishment at Miami Beach as a good example of the economic benefits of beach investment in restoration. Miami Beach had virtually no beach in the mid 1970's. As a result, facilities were run down, and Miami Beach was not the place to visit. Beach nourishment (a term that describes a process by which sediment - usually sand - lost through longshore drift or erosion is replaced on a beach. It involves the transport of the nourishment material from one area to the affected area) in the late 1970's rejuvenated Miami Beach and opened its beaches to the public. Beach attendance, based on lifeguard counts and aerial surveys, increased from 8 million in 1978 to 21 million in 1983 (Wiegel, 1992). The number of foreign tourists visiting Miami increased from 2.3 to 5.6 million from 1980 to 2000. Four million overnight visitors stay in Miami Beach annually, and 7 of the 10 million tourists visiting Miami visit its South Beach. These visitors spend \$4.4 billion annually in Miami Beach including expenditures of \$2.4 billion by foreign tourists (City of Miami Beach, 2001).

The annual foreign revenue from tourists at Miami Beach of \$2.4 billion is about 50 times the \$52 million cost of the Miami Beach nourishment project that has lasted over 20 years (Houston 1996). This nourishment project demonstrates the economic and social impact of a state investing and developing in a local natural resource such as a 'beach'. For every \$1 that had been invested annually to nourish the beaches, Miami Beach has received almost \$500 annually in foreign exchange. Houston (2001) points out that if the 'Miami Beach Nourishment Project' was repeated successfully in a national beach restoration program, an investment of 1% of the annual US Crop subsidy would wipe out the average annual US trade deficit of the past decade. This also demonstrates a case for investment in beach facilities or enhancement projects in other countries such as Ireland, where the coastal product is abundant, but needs strategic direction in order to maximise the economic impact of the natural marine tourism natural assets available.

In contrast to beaches, National Parks are also seen as major assets to a country. In the case of Addo Elephant National Park (AENP) in South Africa (see appendices 16 for AENP Map), Saayman and Saayman (2006) conducted a study to investigate the socio-economic impact of the park. What is interesting about AENP: it was the first 'Big 7' park in the world (that is, it contains elephant, rhino, lion, buffalo, leopard, the Southern Right Whale and the Great White Shark); in the last 10 years it has expanded significantly to include a large coastal area; with this expansion there has been growth in the number of tourism products and businesses in the area; and the park is in one of the poorest provinces of South Africa, which makes job and income creation projects so much more important.

In 2004, Saayman and Saayman undertook two surveys which included a visitor survey and a business survey in order to evaluate the socio-economic impact of the park. A total of 82 visitors to the park during the month of December in 2004 completed the questionnaire, which represents 4.1% of the visitor groups during the month of December. A total of 83 businesses in

the AENP and within its borders were also surveyed in December 2004. The aim of the survey was to determine the linkages between businesses in the area, a breakdown of business expenses and the relationship between turnover and the income and size of the workforce. To estimate the economic impact of ANEP, Saayman and Saayman choose the multiplier methodology as discussed earlier in this Chapter. The study findings reported the total income generated in AENP amounted to €2.9 million (R23,312,635) in 2003. The total value of tourist expenditure included 18,728 unit nights' sold and 14,509 campers visiting the park in 2004.

In relation to employment and business development, Saayman and Saayman, found examining the years of existence of a business gave a good indication of how business has developed in the AENP region. Only the Golf club, one general dealer and a meat wholesaler have existed longer than the AENP (which is 74 years old). Most of the other business and accommodation establishments have been in existence for less than ten years since the park expanded to include a large coastal area. It was also found that the main economic activity in this area has traditionally been agriculture, with little manufacturing activity, and this is evident from the age and nature of businesses. Sixty per cent of the guest houses and B&B establishments indicated that they would not have existed if it had not been for the AENP, while 27% of lodges and self-catering accommodation establishments felt the same. Only one retailer indicated that he owed his existence to the park, while 37.5% of tourism and recreation services and restaurants would not have been there had it not been for the park. The park had led to the establishment of 34 businesses (33% in the area).

This AENP study further informs the small tourism business literature discussed in section 2.2 of this Chapter and the important role small business development plays in driving the economic development of the tourism industry in a regional rural setting. Government policies such as the expansion of the park to include the coastal zone area have also played a key role in driving new business start-ups and encouraging more visitors to spend time in the area. Furthermore, the study conducted by Saayman and Saayman in 2004 was the first of its kind in South Africa and contributes to the general understanding of the socio-economic impact of the national parks on an area/region as well as the linkages between industries in rural areas in South Africa. The results clearly show that the park has a significant impact on employment, production and general income creation in the region. It has also led to the establishment of businesses, and this supports the general finding from the literature discussed earlier in this Chapter, that investment in tourism, and specifically in rural areas, can contribute to the development of a region.

In 2004, in the North West Region of Wales a similar economic impact study (Newidiem, 2004) was conducted on Snowdonia National Park, a destination known for adventure and water-based activities (include Bouldering; Caving; Canoeing; Climbing; Coasteering; Diving; Fell running; Kayaking; Kite surfing; Mountain biking; Orienteering; Paragliding; Road cycling; Sailing; Mountain scrambling; Skiing; Snowboarding; Surfing; Walking; White water rafting and Windsurfing). Tourism in the North West region of Wales is a complex and fragmented industry, characterised largely by micro-businesses with 1,700 SMEs (small and medium sized

enterprises) alone in Gwynedd. The industry is a key employer which has a significant effect on the local economy and acts as a key economic development driver in the region (Newidiem, 2004). The purpose of the Snowdonia National Park (SNP) Study was to fully appreciate the economic contribution of the sector to the local economy of the park and its surrounding area as well as the wider North West Wales economy. The main tool for collecting information to inform the economic impact assessment was by questionnaires. The principal survey tools used were an adventure tourism business survey, accommodation provider survey and business case studies. The study identified over 200 adventure tourism operators across North West Wales. Thirty one per cent (63) of the tourism adventure businesses completed the postal questionnaire. A further 600 accommodation providers were targeted ranging from hotels to B&B's to camp sites. Eleven per cent response rate was achieved from the accommodation providers. The study found that the total number employed within the adventure tourism sector including accommodation providers across North West Wales to be 8,451, of which 2,178 are directly employed within businesses operating adventure tourism activities. Approximately 1,250 people are employed all year round.

The economic model used for the calculation of the economic impact of the outdoor activities sector broadly follows the method used by Huggins and Cooke in a study of the local area impact of Cardiff University (1996). This methodology is applicable to any economic assessment and corresponds with the multiplier process literature discussed earlier in this Chapter. However, in order to apply the formula to the North West Wales and Snowdonia/Eryri area, the values for the leakages (tax rates, retention rates and saving rates) have been chosen to reflect the specific characteristics of the area. In terms of the total economic impact of the adventure tourism sector including the accommodation providers, £60million is contributed to the Snowdonia/Eryri economy. For every pound spent on outdoor activities and accommodation, generates a further £0.76 for the local economy. Finally 42.6% of the overall impact on the North West Wales economy is felt in Snowdonia/Eryri. To put this in context, the Wales Tourist Board estimate that total spending by tourists in 2002 was £1795 million for Wales as a whole and £535 in North Wales (see Figure 2.7 for a breakdown of the findings from the multiplier process).

This study provides a good example of the tourism economic impact methodologies discussed earlier in this Chapter. Similar to the AENP study the Snowdonia economic impact case demonstrates the impact of branding a National Park area as an 'adventure zone' which impacts small business and entrepreneurial activity, employment, production and general income creation in isolated or underdeveloped rural areas.

Figure 2.7 The Total Economic Impact

ROUNDS	SNOWDONIA	NORTH WEST WALES
Round 1	£ 34,280,610.	£ 71,992,179.
Round 2	£ 23,847,195.	£ 57,291,590.
Round 3	£ 1,991,986.	£ 10,209,361.
Round 4	£ 166,393.	£ 1,819,308.
Round 5	£ 13,899.	£ 200,599.
Round 6	£ 1,161.	£ 57,773.
Round 7	£ 97.	£ 10,295.
Round 8	£ 8.	£ 1,835.
Round 9	£ 1.	£ 327.
Initial Injection	£ 34,280,610.	£ 71,992,179.
Induced Income	£ 26,020,740.	£ 69,591,088.
TOTAL IMPACT	£ 60,301,349.	£ 141,583,266.
MULTIPLIER	1.76	1.97

Source: RHA Newidiem, 2002.

Note: Round 1 includes total salary expenditure and total goods and services expenditure for outdoor activity operators plus accommodation provider businesses.

In Ireland, there has been very little academic research undertaken in the area of socio-economic impact of marine tourism resources. However, one interesting example on the impact of Malahide Marina has been reviewed. This study was conducted by the ISMS (Irish Sea Marine Sector) in 2007. The Malahide marina is situated on the east coast of Ireland, some 16 kilometres north of Dublin in the village of Malahide. It was established in 1992 as part of a property development. The marina and the associated marina apartments at Malahide changed the appearance and function of the shoreline and provided local amenities including a restaurant and a promenade. Visiting boats to the marina enter the Malahide Estuary to access the marina via a marked channel. The marina has space for 350 boats and achieves occupancy of 78%. 53% of the boats in Malahide are motor boats with 47% sail. On the shore side, the marina has shower, changing and laundry facilities. ISMS (2007) suggested the fact that the marina is not full probably reflects perceptions about the difficulty of using the approach channel to enter the Marina.

Malahide keeps fifty berths for visitors and had four hundred visiting boats in 2004. The average spend per boat visit was found by the ISMS survey to be €105. From the business survey the study found that 49% of businesses had been in place before the marina opened with 51% opening after 1992 when the marina was established. The marina itself supports 14 direct jobs, with a further 37 jobs provided by businesses on the marina site. The estimate for full time equivalent jobs (FTE) supported by the development of the Malahide marina is 61 (this is based on an expenditure of €50,000 supporting one full time equivalent job) and 34% of local businesses attribute 19% of the growth in their turnover to the development of the marina. Similar to the other studies discussed above this further demonstrates how investment in tourism facilities drives business development and employment in an area.

The overall benefits reported from the ISMS 2007 study of Malahide Marina included: increased opportunities for boating in the area; visitor expenditure and its associated secondary benefits are estimated to total €58,800 per year; berth holders expenditure averages €7,787 per boat per year (this is spent on maintenance, chandlery, fuel, personal protective equipment, clothing, insurance, marina berthing fees and training, Marina berthing fees account for 29% of this), generating a yearly receipt for marina related businesses of €2.12 million. Secondary benefits from this expenditure are estimated at €850,340 per annum.

Finally, property values have increased due to mooring and entertainment facilities in the area. This is borne out by research undertaken by the Sunday Times (The Rush for Liquid Assets, The Sunday Times, March 26th 2006). A survey of twenty UK estate agencies specialising in homes in coastal and canal locations shows that properties with moorings are typically 30% more expensive than identical properties inland. Top quality homes without moorings but with uninterrupted estuary or river views have a 25% premium, while flats and houses at modern marinas, at lakesides or on the banks of canals attract 15% to 25% extra. Rising house prices can also have a negative impact on the local people and businesses in coastal zone areas and this will be discussed further in Chapter Four and Six.

All studies discussed above highlight the long-term economic benefits that can be gained by a local community from sustainable tourism investment programmes. The final section of this Chapter will examine the performance of the tourism industry from an international, national and regional perspective.

2.4 Tourism Industry Performance

2.4.1 Tourism Industry International Performance

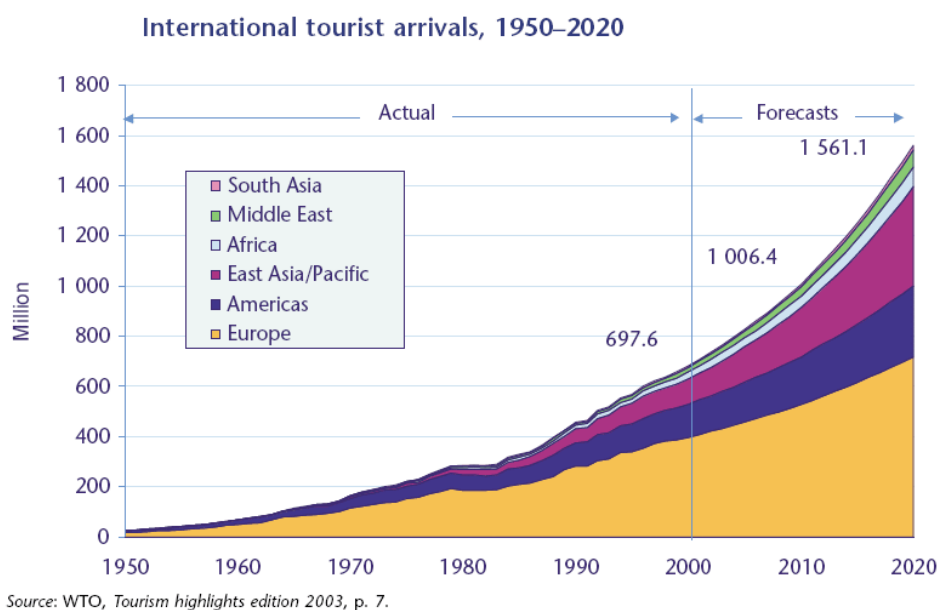
Facts put forward by the UNWTO (2008) and OECD (2007) demonstrate the powerful presence of the tourism industry including the fact tourism is responsible for over 10% of global domestic product (GDP) and by 2020 international arrivals are forecast to exceed 1.5 billion and this will support 250 million jobs (see Figure 2.8).

The UNWTO estimated some 763 million international trips were taken in 2004 (compared to 691 million in the previous year) with provisional worldwide tourism receipts reaching \$622 billion (excluding the cost of international fares). These figures do not include the vast number of people taking trips within their own country; probably six times this number will take a domestic trip lasting at least four nights (UNWTO, 2004). Tourism in the world is predominantly domestic (people travelling in their own country), which accounts for 80% of tourist trips.

In 2005, the World Tourism Organisation (UNWTO) reported that tourism directly and indirectly generates and supports 195 million jobs globally. This is equivalent to 7.6% of the world's workforce. At the same time around half of these jobs are in SMEs (small or medium sized enterprises), the main engine of the tourism industry as discussed earlier in this Chapter.

In 2007, international tourist arrivals grew by 6.6% to reach a new record figure of over 900 million. This represented 56 million more arrivals than in 2006 (UNWTO, 2008). International tourism receipts grew to US\$856 billion (€625 billion) in 2007, corresponding to an increase in real terms of 5.6% over 2006. This equates to 30% of the world's exports of services (UNWTO, 2008). Receipts from international passenger transport are estimated at US\$165 billion, bringing the total international tourism receipts including international passenger transport (i.e. visitor exports) to over US\$1 trillion, corresponding to almost US\$3 billion a day. UNWTO (2008) also reported in 2007, just over half of all international tourist arrivals were motivated by leisure, recreation and holidays (51%) – a total of 458 million. Business travel accounted for some 15% (138 million), and 27% represented travel for other purposes, such as visiting friends and relatives (VFR), religious reasons/pilgrimages, health treatment, and others (240 million). The purpose of visit for the remaining 7% of arrivals was not specified.

Figure 2.8:



A slowdown in international arrivals began with the 2008 summer holidays in the northern hemisphere and this downward pattern has continued. In 2008, international tourism registered a 2% growth rate reaching 924 million compared to a 7% growth rate in 2007 (UNWTO, 2008).

With the exception of Africa, all regions recorded a decrease in arrivals for the first four months of 2009 (UNWTO, 2009). According to the UNWTO (2009), international tourism declined by 8% between January and April 2009 compared to the same period last year. Destinations worldwide recorded a total of 247 million international tourist arrivals in those four months, down from 269 million in 2008. Given the changes in the outlook, UNWTO revised its forecast for the full year 2009 indicating international tourism decreasing by between -6% and -4% in 2009.

Pleumarom (2007) points out the fickle nature of tourism, and indeed the industry's special vulnerability to bad news and events has been proven many times in recent years including; the slumps following terrorist attacks such as 9/11 in New York and the Bali bombings, the threat of diseases such as SARS and swine flu or environmental crises. The Indian Ocean tsunami in 2004, and Hurricane Katrina that hit New Orleans in 2005, caused immeasurable costs for the travel and tourism industry. What needs to be calculated here are not only the costs of lost property and the reconstruction of tourist infrastructure in the case of disasters, but also the costs of tourists staying away from crisis-hit destinations for a long time, as well as the high expenditures for promotional campaigns to get tourists visiting again.

To enable the tourism industry to sustain long term growth and performance the UNWTO and international business associations, such as the Pacific Asia Travel Association (PATA) have established crisis centres and risk management task forces (Pleumarom, 2007). A "Resilience Committee" has been set up to support its Members with accurate economic analysis and response mechanisms.

2.4.2 Tourism Industry Performance in Ireland

The OECD (2008) reported that in 2006 total foreign and domestic tourism revenue of €6.09 billion generated an overall GNP impact of €5.63 billion after applying multiplier effects (direct, indirect, induced and Government interacting). As a result total tourism revenue in 2006, accounted for 3.7% of GNP. The estimated total number of people employed in the Irish tourism and hospitality industry in 2006 was 249,338 - an increase of 1.4% on the numbers employed in 2005. Of this number, almost 203,000 are year-round employees. The growth during this time period corresponds with strong economic performance by Ireland.

Between 1999 and 2005, Fáilte Ireland (2006) reported that overseas visitor numbers increased by 13.9%. This indicated a total of almost 6.8 million visits reached in 2005. Visitor growth has been highest to Dublin and the eastern regions. During the period spanning the most recent National Development Plan (i.e. a strategic plan developed by the Irish Government sets out the roadmap to Ireland's future), total foreign exchange earnings from tourism increased by 37.1%. This was an increase from €3,115 million in 1999 to €4,272 million in 2005. This level of foreign revenue earnings is equivalent to half the value of exports by all Irish-owned manufacturing companies. Most of the gains in foreign-exchange earnings from tourism were concentrated from 1999 to 2001 (see Table 2.1).

Table 2.1: Tourism Revenue 1999-2005

Country or area	1999	2000	2001	2002	2003	2004	2005
Britain	1012	1088	1211	1283	1319	1276	1274
Mainland Europe	631	727	815	867	885	930	1239
North America	555	689	718	709	787	772	738
Other overseas	145	178	209	229	236	256	236
Total overseas	2343	2682	2952	3088	3228	3235	3487
Northern Ireland*	115	123	143	161	176	174	179
Overseas same-day	16	19	21	17	21	22	23
Carrier receipts**	641	813	820	723	633	628	583
Tourism foreign exchange earnings	3115	3637	3935	3989	4057	4059	4272
Domestic tourism receipts	n/a	707	880	849	971	1037	1165
Total tourism revenue	n/a	4344	4815	4838	5028	5096	5437

Sources: 'Tourism Facts', 2003, 2004 and 2005, Fáilte Ireland.

NOTES: Figures may not add to exact totals due to rounding.

*Includes expenditure on same-day visits by Northern Ireland residents.

**Passenger fare receipts of Irish carriers derived from visits to Ireland.

In the four years ending 2005 tourism's foreign currency earnings rose 8.6% in current terms, although the ground expenditure grew faster, given that competitive fares caused Irish carrier receipts to decline. Mainland European visitor numbers rose rapidly from 1.3 million to 1.9 million between 1999 and 2005 (Fáilte Ireland, 2006). This led to a doubling of the foreign-exchange contribution from this market and a welcome fall in the industry's dependence on the traditional English-speaking markets.

Domestic tourism has also grown rapidly and exceeded €1 billion for the first time in 2004. In just four years, domestic tourism receipts increased by 46.7% (Fáilte Ireland, 2005). Total foreign exchange earnings generated by tourism rose by almost 10% in real terms in the six years ending 2005 (CSO, 2006). When compared to Ireland's competitors, real-term earnings growth between 1999 and 2001 was impressive. It substantially built on the market share gains recorded over the preceding decade.

In 2004, the Tourism Policy Review Group (TPRG) in Ireland reported that the major factor contributing to the growth was the intrinsic attractiveness of the landscape, culture and people of Ireland as a visitor destination together with the energy, enterprise and increasing professionalism of the people in a largely Irish owned industry. Ireland has experienced growing visitor numbers, with 2006 being described as a landmark year for tourism with CSO (Central Statistics Office) figures showing an 11% increase on 2005. In 2006 the tourism industry earned the highest foreign revenue of €4.6 billion ever recorded with domestic tourism expenditure totalling additional €1.16 billion revenue (CSO, 2007). This resulted in over 7.4 million visitors coming to Irish shores and the highest foreign revenue of €4.6 billion ever recorded for the industry (Fáilte Ireland, 2007). Domestic tourism expenditure amounted to €1.16 billion making tourism in total a €5.8 billion industry compared to the Science and Technology Industry which generated €2.6 billion in 2006 (CSO, 2007).

In addition, the government earned an estimated revenue of €3.5 billion through the taxation of tourism expenditure (CSO, 2007). It is estimated that for every Euro spent by out-of-state tourists, 52c eventually ends up with the government through taxation (CSO, 2006). Tourism revenue accounts for 3.8% of GNP (Fáilte Ireland, 2006). The breakdown of expenditure and spend per visitor is outlined in Table 2.2.

Table 2.2: Breakdown of Expenditure and Spend per Visitor

	Average	Great Britain	Mainland Europe	North America	Other Areas
Bed & Board	29%	7%	32%	29%	28%
Other Food & Drink	34%	38%	34%	30%	31%
Shopping	16%	14%	17%	19%	19%
Internal Transport	10%	11%	10%	11%	9%
Sightseeing/Entertainment	5%	5%	5%	6%	5%
Miscellaneous	5%	5%	4%	4%	8%
Spend Per Visitor					
Revenue Per Visitor	€490	€343	€652	€783	€788

Source: Fáilte Ireland, 2006

Estimating the economic impact of tourism in Ireland has been difficult over the years. In essence, the absence of a regularly updated input/output table for the country, and data deficiencies in relation to tourism expenditure beyond national aggregates, are some of the serious impediments that have confronted researchers (Deegan and Moloney 2005). In addition, the absence, in an Irish context of regional input output models, has also hampered many attempts to calculate regional impacts and remains one of the outstanding data deficiencies in the Irish statistical system. In contrast, the use of input-output techniques at a regional level is widespread in other countries (Armstrong, 1995).

Despite the constraints to date, there have been developments that allow Ireland to make some major inroads on economic impact assessment, as a result of Deegan and Moloney (2005) as noted earlier in this Chapter, who completed the first Tourism Satellite Account for Ireland. The Tourism Satellite Account is a recognised Statistical Procedure approved by the United Nations Statistical Commission and the World Tourism Organisation in 2001. In essence, the system of Tourism Satellite Accounts sets out 10 idealised tables that all Statistical Agencies responsible for tourism should be able to complete, and it will not be too long before all countries will be obliged by the EU Commission to have a complete set of TSA tables. In reality, the ability to complete TSA tables will be dictated by the adequacy of the overall statistics collected in a country and by the completeness of the tourism data. While the first TSA tables for Ireland have highlighted some deficiencies (particularly the absence of day visitor expenditure estimates which were calculated by Deegan and Moloney) the first exercise has produced some meaningful national estimates for the employment impacts of tourism. Table 2.3 highlights the estimated number of tourism industry employees in Ireland, 2006, with 'Tourism Services and Attractions' employing 36,421 people (15%). This category is linked to marine tourism businesses, which will be discussed in further Chapters of this thesis.

Table 2.3: Estimated number of Tourism Industry Employees in Ireland, 2006.

	Nos	%
Hotels	54,095	22
Guesthouse	2,918	1
Self-Catering Accommodation	3,641	1
Restaurants	43,309	18
Non-Licensed Restaurants	16,589	7
Public Houses	88,986	36
Tourism Services and Attractions	36,421	15
Overall	245,959	100

SOURCE: FITZPATRICK ASSOCIATES' SURVEY OF TOURISM SECTOR OPERATORS, 2005

Table 2.4: Estimated Regional Distribution of Tourism Industry Employees in Ireland, 2006.

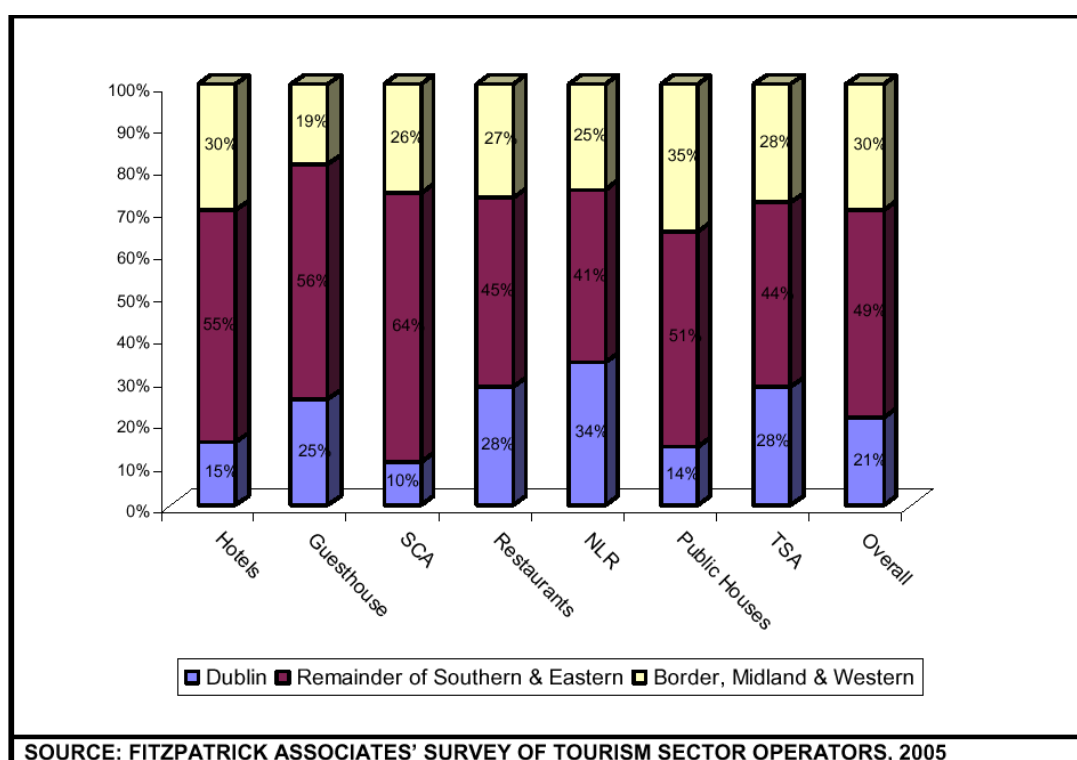


Table 2.4 further demonstrates the spread of employees throughout Ireland with 28% of the 'Tourism Services and Attractions' category employed by businesses in the Border, Midland and Western Region (BMW Region).

Forecasts for future growth estimate that Ireland has the capacity to attract 10 million visitors by 2012 with foreign earnings of €6 billion (Fitzpatrick Associates, 2008). However, in the current economic climate, the Irish tourism sector is now facing a number of challenges. Key challenges include attracting visitors to Ireland, the management of product quality, value and competitiveness whilst attention must also be paid to environmental issues, which will result in the development of sustainable tourism.

2.4.3 Tourism Industry Performance in the West of Ireland

According to the Irish Regions Office (2008), the West Region of Ireland comprises the counties of Galway, Mayo and Roscommon. At a regional level tourism is frequently concentrated in areas, which lack an intensive industry base such as Connemara, North Mayo and Roscommon. Tourism is credited with having a significant regional distributive effect and is the primary source of employment in many parts of the West of Ireland. Government investment in the West Region tourism industry compared to other Regions in Ireland is discussed in Chapter Seven.

According to Fáilte Ireland almost 3.7 million visitors came to the West of Ireland in 2006 and revenue achieved was in excess of €777 million. Tourism is seen as a vital industry for both urban and rural locations in the region. While the city of Galway dominates the region there are a number of strong tourism clusters or micro-destinations including Westport, Aran Islands, Connemara, Burren, and Boyle Valley in Roscommon, all of whom depend hugely on the tourism industry for employment and revenue.

Table 2.5: Overseas Visitors 1999 – 2006 - Total

	1999	2000	2001	2002	2003	2004	2005	2006
Visitor No's (000s)	1,402	1,310	1,220	1,190	1,159	1,250	1,235	1,412
Visitor Rev (€m)	333.3	407.8	416.2	419.7	434.2	460.4	441.1	469.2

Source: Fáilte Ireland Tourism Fact Sheets 2006

According to Fáilte Ireland, total Tourism Revenue in the West amounted to €777m in 2006 of which €469m was derived from overseas earnings (60%) and €308m (40%) was generated from Domestic and Northern Ireland earnings. The Fáilte Ireland West region accounted for 16.5% of all overseas tourism revenue into the country and accounted for 22% of domestic revenue. Key markets for the West are changing with Mainland Europe increasing to 528,000 visits. The North American market was in 2006, with 352,000 visitors, however numbers have declined since 2007 with currency fluctuations and the economic downturn. The breakdown of tourists to each county in the West and the revenue generated is outlined in Table 2.6.

Table 2.6: Overseas Tourist by County (000s)

Overseas Tourists by County	Total	Britain	Mainland Europe	North America
Galway	1,179	326	466	314
Mayo	308	114	108	72
Roscommon	58	31	12	11
Revenue Generated by Overseas Tourists by County (€m)				
Galway	359	96	131	116
Mayo	92	41	27	23
Roscommon	21	11	7	3

Source: Fáilte Ireland 2006

Table 2.7: Total Overseas Tourists to the West 2006

	Visitors		Holidaymakers	
Overseas tourists (000s)	Numbers	Nights	Numbers	Nights
Britain	449	1,966	273	1,230
Mainland Europe	528	3,042	405	1,580
North America	352	1,601	275	912
Other areas	82	220	68	180
Total Overseas Tourists	1,412	6,829	1,021	3,901

Source: Fáilte Ireland 2006

In 2006 the Fáilte Ireland *Exit Survey* reported the main reason for visiting the West was a holiday (72%). The most popular months of arrival are July and August (17% respectively) and the shoulder months are May (12%), June (11%) and September (10%). 83% of tourists to the West arrive by air and the average length of stay is 4.8 nights in the West and 9.7 total for Ireland. Traditionally, some 26% of all visitors use hotels as their accommodation in the West, 34% use B&B's and guesthouses, 8% use self-catering, and 9% used hostels. A further 23% of visitors stay with friends and relatives, and 3% use caravan and camping.

Average money spent per visitor in the West 2006:

- Britain €328 (147.3m by 449,000)
- Europe €312 (164.7m by 528,000)
- N. America €403 (141.7m by 352,000)
- Other areas €189 (15.5m by 82,000)
- Domestic/NI €239 (308m by 1,286,000)

Source: Fáilte Ireland 2006

Tourism businesses in the West are particularly dependent on the domestic market and there is a special reliance on Britain and Mainland Europe visitors. The majority of visitors are couples or individuals who travel alone and are mostly 'white collar' or C1 (60%) socio-economic group. In 2006, the largest age group visiting the West of Ireland was over 45 years old (44%). Ireland's West drive up overseas business through increasing access from Knock, Galway and Shannon airports while at the same time improving access via the road network from Dublin and major ferry ports and by rail.

Domestic visitors to the region are vital as a major source of revenue (€230million) and due to the timing of their visits. Overseas tourists arrive in high season while the domestic patterns of arrival are more evenly spread throughout the year

Timing of Domestic Trips (%):

- January – March 23%
- April- June 22%
- July – September 33%
- October-December 22%

Source: Fáilte Ireland 2006

In 2005, a report (Deegan and Moloney 2005) that was commissioned by Ireland West Tourism, the Regional Tourism Authority for counties Galway, Mayo, and Roscommon, showed that the overall economic contribution of tourism to the region is €1.9 billion. This is the first regional study of its kind clearly demonstrating the central role the tourism industry plays, and most importantly will play in the future, in the fabric of the West of Ireland economy. The Ireland West study goes on to detail the changing nature of the sectoral performance of the region since 1998 and argues that the West region mirrors international trends whereby services have now become the dominant economic force for developed economies. The report details that employment in Ireland West increased by 30% from 1998 to 2004 and accounted for 186,000 persons in 2004,

and 9,400 were related to tourism expenditure. Employment growth in the West Region has been driven primarily by construction (+81%), financial services (+72%) the public service (+56%) and other services (+47%). Agriculture is the only sector to have suffered a decline of employment (-21%).

The report demonstrated that for every €1 spent directly by tourists in the West of Ireland a further 51 cent is generated indirectly, and for every €1m spent directly by tourists 10 jobs were created, 5 directly and 5 indirectly. Tourism exhibits far greater linkages with other sectors of the economy than many sectors and it must clearly be recognised as an export sector. A very significant issue to emerge from the Ireland West report is the relative importance of tourism to the economy in the Ireland West region compared to the Dublin region. Tourism expenditure accounts for 7.6% of the Gross Value Added² (GVA) in Ireland West, compared with 3.8% in the Dublin region. This shows that from an economic activity perspective, tourism is 275% more important to the Western economy than it is to the Dublin economy. From an employment perspective, jobs related directly to tourism account for 5.4% of the workforce in the West against 3% in Dublin. This clearly demonstrates the importance to the health of the overall Western economy of strong and sustained investment, innovation, development, and targeted marketing in the tourism sector.

At a regional level, Henry and Deane (1997) also identified the most important benefits of tourism to regions as being an agent of income dispersion with its contribution to income and employment. Their study concentrates on county regions. They indicate that of the five county regions with the main cities, that is Dublin, Cork, Limerick, Galway and Waterford, Cork is second only to Galway as regards benefiting from tourism relative to population. Data reported by Fáilte Ireland (2004), CSO (2004) and Deegan (2004) support Deane and Henry's findings. For example, 4.5 million people visited the Dublin region in 2003 and generated revenue of €1,220 million. In contrast, Table 2.8 shows approximately 2.5 million visited the West in 2003 and stayed at least one night generating €690 million. Of this total €234 million of this was spent by Irish and Northern Irish residents. While Dublin receives more visitors and therefore more revenue, when looked at per head of population the West receives approximately the same in relative terms. As shown by Deegan (2004), an important segment of tourist business was the same day visitors. It is estimated that these visitors generated €569 million in 2003.

Table 2.8: West of Ireland Tourist Expenditure and Numbers by Category – 2003

	Numbers 000s	Revenue € m (%)
Overseas Tourists	1,159	456 (36.3)
Over Night Stays³ (at least 1 day)	1,331	234 (18.6)
Same day visits⁴	18,840	569 (46.3)
Total	21,330	1342 (100.0)

Source: Fáilte Ireland 2004, CSO 2004 and Deegan 2004.

² GVA measures the contribution to the economy of each individual producer, industry or sector in Ireland. GVA is used in the estimation of Gross Domestic Product (GDP). GDP is a key indicator of the state of the whole economy.

³ Overnight Stays include Domestic Tourism and Northern Ireland

⁴ Same day visits are best estimates given the lack of direct statistical data. These estimates will be revised as increased data becomes available through the CSO.

Same day spending has never been estimated for the West of Ireland before. This is an important addition given the very large expenditures involved. The methodology is based on Deegan (2004) who produced the first national estimates of same day spending. When the expenditure of 'day visits' of €569 million is added to the currently published expenditure figure of €690 million the total direct expenditure accruing to the region is €1,259 million. Interestingly, the 'day visit' expenditure approximates to 45% of the overall total and when the domestic expenditure of 'overnight tourists' is included this approximates to 64% of the overall total. Importantly, Moloney (2003) indicates that a sizeable proportion of the tourist spending within a region remains in that region.

2.5 Chapter Summary

This Chapter provided a review of the tourism industry, the characteristics of small tourism businesses, tourism economic impact assessment models, and the important role they play in providing the business case for tourism investment or policy decision making.

In summary, tourism directly and indirectly generates and supports 195 million jobs globally (WTO 2005). This is equivalent to 7.6% of the world's workforce and is forecast to rise to over 250 million jobs in 2010 (Cooper 2005). At the same time around half of these jobs are in SMEs (small or medium sized enterprises), the life blood of the tourism industry. Small enterprises in the tourism and hospitality sectors encompass many micro-businesses, part-time operations. Bolin and Greenwood (2003) explain the term 'micro business' has been used to describe businesses with less than four employees. Within the small or micro tourism business literature, a number of themes and issues have been identified including: owner operator characteristics, family life; gender issues; lifestyle motivations for setting up the business; the challenges with the rural environment in which they operate such as seasonality and operator costs; and the connections between the business and its long term development.

It is estimated that more than two and a half million small and medium enterprises (SMEs) are involved in the tourism industry in Europe (Middleton, 2001) with 81.5% of these actually falling into a micro category. The EU tourism industry is dominated by SMEs employing on average six people. There were 82,100 small enterprises engaged in the services sector in Ireland in 2005, an increase of 21,600 since the year 2000. Most of the services enterprises (88%) employed between 1 and 9 persons. Fáilte Ireland's Tourism Business and Employment Survey 2006, estimated the number of people employed in tourism and hospitality-related services was just over 249,000.

The tourism industry offers opportunities for relatively easy entry into a number of business types that specifically appeal to sole operators and families because of small size (resulting in lower capital and operating costs, or greater manageability by fewer people), desirable location, or connection with leisure and lifestyle preferences (Getz and Carlsen 2000). Shaw and Williams (1997) observed that noneconomic reasons existed for many tourism/hospitality owners entering business in UK coastal resorts.

This Chapter also examined literature on tourism economics and the range of assessment models and methods for measuring the economic impact of tourism businesses, tourists, tourism assets and locations. In summary, tourism economics measures the amount of travel and its economic consequences, direct, indirect, and induced. Definitions and methods of collecting travel information vary considerably and are evolving (Lundberg, Stavenga and Krishnamoorthy, 1995). There are a number of economic benefits to tourism discussed in the literature that

include; foreign exchange earnings and the balance of payments, the generation of income and employment, the improvement of economic structures, the encouragement of entrepreneurial activity, and the stimulation of economies and the mitigation of regional economic disparities. A range of techniques have been developed to measure the economic benefits and the impact of tourism, the most popular being the multiplier process. An integral part to the economic assessment exercise is an understanding of the multiplier concept. Keynes developed the Multiplier concept in the 1930's as a means to achieving full employment. For example in the tourism industry, the multiplier effect comes about because of direct tourism revenue injections of demand into the circular flow of income, which stimulates further rounds of spending, causing knock-on economic effects for a city, town or region. The total amount of these further rounds of spending is known as the 'indirect effect' or the 'total induced effect'. Together the direct revenue injection plus the total induced effect equals the total economic impact.

There were a number of studies examined in the literature that focused on the social and economic impact of tourism resources or assets such as beaches or national parks in a national or regional context. Studies discussed in this Chapter relate to the economic value of 'Beaches in the US'; 'Addo Elephant National Park in South Africa'; 'Snowdonia National Park in Wales'; and Malahide Marine in Ireland. The studies examined are famous for their marine leisure and adventure tourism offerings. All of these examples present real values for tourism assets or resources that share some similarities with the West of Ireland's tourism assets. The studies examined present questions and research requirements relating to the possible economic values of 'Connemara National Park' or 'the Aran Islands or the 'pristine blue flag beaches' in the West of Ireland. In the case of the 'Malahide Marina' study it demonstrated the potential economic and social value of investing and developing in marina facilities in other parts of Ireland.

Finally, the Irish tourism industry in Ireland has achieved remarkable growth over the last twenty years with overseas visitors growing from 1.95 million in 1985 to 7.4 million in 2006 (Fáilte Ireland Fact Sheets 1985-2006). From 2000-2007 growth rates of over 9% have been achieved and these periods of growth correspond with a strong economic performance by Ireland. Since 2008, the tourism industry has experienced a downturn due to the global economic crisis. As a result visitor numbers have dropped and this is presenting challenges to businesses and government bodies to address its tourism product portfolio and the range of markets which offer potential long term. Holiday destinations are now increasingly determined by activities, hobbies, interests and curiosity. One such Irish tourism product and natural national asset is in 'marine tourism', a tourism product, offering a range of 'adventure and escapism experiences' to the domestic and international visitor. Marine tourism literature will be examined further in Chapter 3 and 4.

CHAPTER 3 EVOLUTION OF MARINE TOURISM

3.1 Introduction

Ocean and coastal tourism is widely regarded as one of the fastest growing areas of contemporary tourism (Pollard 1995; Kim and Kim 1996; Orams 1999; Hall and Page 2006) however, it does remain under researched. The sea has a strong attraction to people, and this growth is not surprising given the fact that; six out of ten people around the world reside within 60 kilometres of the coastline and two thirds of the world's cities with populations greater than 2.5 million are located by tidal estuaries (Miller 1993).

A wide range of niche tourism products in sport, leisure, and recreational experiences provide tourists, sportspersons, people at leisure, and recreationalists with substantial choices for how to spend their non-work time. Jennings (2007) has explained such niches to include adventure tourism, sport tourism, recreational tourism, event tourism, marine tourism, national park tourism, and 'sun, sea and sand' tourism.

This Chapter examines marine tourism definitions and the historical development of this market. The range of water-based visitor products is also discussed and the marine tourism market performance from an international perspective. It also profiles the marine tourist's characteristics and their motivations behind choosing one activity over another.

3.2 Marine Tourism Developments

3.2.1 Marine Tourism Defined

Marine tourism shares a number of similarities with the wider tourism industry discussed in Chapter Two. However, an important distinction of marine tourism is that it is a leisure experience which occurs in a natural water-based location. There are a number of definitions available in the literature, which describes this niche tourism market. Orams (1999) defines marine tourism as recreational activities that involve travel away from one's place of residence and which have as their host or focus the marine environment (where the marine environment is defined waters which are saline and tide-affected). This definition attempts to acknowledge the term 'marine' in its biological sense – it does, however, exclude freshwater aquatic environments. Jennings (2003), on the other hand describes water based tourism relating to any marine tourism activity undertaken in or in relation to water resources, such as lakes, dams, canals, creeks, streams, rivers, waterways, marine coastal zones, seas, oceans and ice-associated areas. Hall and Page (2005) argue that marine tourism is also 'nature based tourism' which includes activities such as surfing, sailing, fishing diving, wind surfing or sea kayaking.

Other definitions provided by Pearce and Kirk (1986) identified three elements to the coastal environment; *the hinterland* (where accommodation and services are provided); *the transit zone* (i.e. dunes) and the *recreational activity zone* (beach and sea). This definition only defines the coastal zone area, it does not however provide an explanation on the range of water-based activities that can take place in the coastal environment.

The term 'marine ecotourism' has also emerged in the literature, which means different things to different researchers. For example, according to META⁵ (2004), at the heart of almost all definitions of marine ecotourism is the enjoyment and appreciation of the natural marine environment in all of its many forms, along with any associated cultural features. Therefore, marine tourism is focused on the enjoyment and appreciation of water-based activities and nature and its provision involves a number of agencies, individuals and enterprises engaging in the following activities:

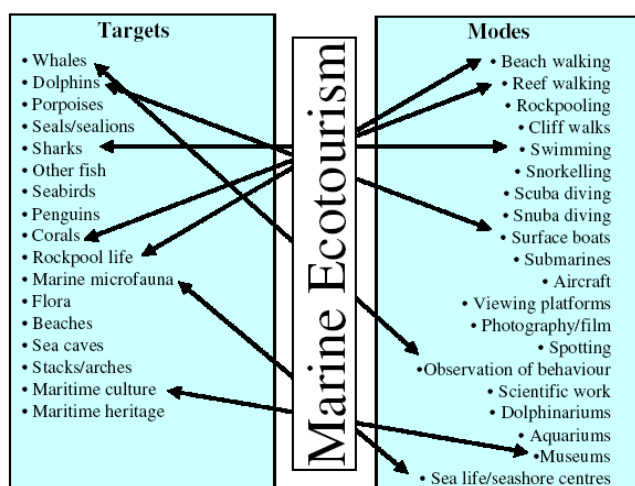
- planning and management;
- sustainable management with environmental protection;
- appropriate interpretation and education about the natural environment;
- a judicious mix of formal and voluntary management measures;
- collaboration among stakeholders;
- responsible marketing; and
- appropriate monitoring and evaluation.

Furthermore, according to META in 2004 examples of marine ecotourism activities include:

- watching whales, dolphins, sharks, seals and other marine animals
- seabird ornithology
- diving and snorkelling
- nature-based sightseeing trips by surface boat or submarine
- rock-pooling
- coastal footpath and beach walking
- visiting seashore and sea life centres.

⁵ Marine Ecotourism for the Atlantic Area

Figure 3.1: Modes and Targets of Marine Ecotourism



Source: Garrod and Wilson, 2004

There are usually sea-based and land-based elements to any marine ecotourism operation and often these activities focus on multiple targets. Garrod and Wilson (2004) use the term 'targets' because it is perhaps useful to think about marine ecotourism in terms of its targets and the modes of participation (see Figure 3.1 above). In reality, some of these targets will be experienced by different modes, or equally, one or more mode may provide the means of accessing the targets – such as viewing dolphins either by boat, from a land-based platform, by aircraft or by swimming with them. Marine ecotourism is, then, the activity that connects these targets and the modes of experiencing them (Garrod and Wilson, 2004).

For the purpose of this thesis, marine tourism, marine leisure tourism or water-based tourism is defined as recreational activities associated with the natural water-based surroundings that can be saline, tide affected and/or inland fresh water recreational and aquatic environments. Marine tourism activities may be formally organised through operators or undertaken independently. They may form the basis of a specialist holiday or simply be an element of a conventional holiday.

3.2.2 Historical Developments of Marine Tourism

Travelling to coastal areas for recreational purposes is not a new phenomenon. It has existed for centuries and dates back to pre-biblical times (Alder, 1989). With nearly 70% of our planet covered by ocean, fishing and shell fish collection, have been major motivations for people to live in and visit marine areas. Similarly recreational activities such as swimming, relaxing, festivals and events have been major attractions that have drawn people to coastal areas and inland waterways.

There is evidence that marine tourism has existed throughout history. Sailing, fishing and surfing are probably the oldest. Early records of pleasure sailing date back to Egyptian times (4000 BC). Similarly, sails were rigged on Chinese junks and Viking boats in very early years. The literature

reports that whenever people ventured on the surface of the water they experienced the challenge of the wind and the water, and all of this meant an adventure, excitement and exhilaration. As a result, Brasch (1995) argues people must have acquired a love of sailing for its own sake and boats once used solely for utilitarian purposes began to serve people for pleasure.

There are similar ancient references to swimming and fishing for pleasure (Brasch, 1995). An interesting reference goes back to AD 109 and is linked to a small town Hippo in present day Tunisia, North Africa and involves a young boy and a dolphin named Sumo. This account has been recorded in a letter by Pliny the Younger (Morris, 1988). The letter details the friendship between the dolphin and the young boy and how their games and tricks became a major attraction, bringing many tourists who wished to witness the spectacle to the town. The story claims that the town became so over crowded with tourists that major shortages of food, accommodation, water and toilet facilities resulted. Controversy over how the 'marine tourism attraction' should be managed ensued and eventually the town elders decided to take action and they killed the dolphin! This historical account illustrates the negative impacts resulting from marine tourism and a debate over the management of such activities are not a recent phenomena, but have existed from the very beginning.

History indicates numerous types of sailing vessels (see image 3.1) used by various people for exploration, trade, warfare or transportation such as Polynesian canoe-based multi hulls (see image 3.2), Arab trading dhows in the Indian ocean and Mediterranean sea feluccas (Cox, 1999).

Image 3.1: Old Sailboat



Source: www.shutterstock.com (accessed July, 2006)

Image 3.2: An Ancient Polynesian Canoe



Source: Herb Kane

Sailing was initially the preserve of wealthy people (Brasch 1995; Cox 1999). Murrrough O'Brien, the 6th Lord Inchiquin (Murrrough of the Burnings) who attended the court of King Charles from 1660 to 1662, brought sailing to Cork, in Ireland. By 1720, interest in the sport had progressed so much that his great-grandson, the 26 year old William O'Brien, the 9th Lord Inchiquin, and five of his friends got together to formalise their sailing activities and in so doing established 'The Water Club of the Harbour of Cork'. This club is known today as the Royal Cork Yacht Club and it is the oldest yacht club in the world.

The 1900's saw intense growth of sailing as a recreational and leisure experience as a result of social, economic, and technological change in Western and industrialised nations. With the advances in technology came boats such as dinghies, which made sailing affordable. However, despite such technological advances, there is a strong interest in maritime history today, with restorations and replica building of 'tall ships' or 'schooners', the development of sailing schools, marine heritage centres and the creation of marine festivals and events.

Ole Evinrude, born Ole Evenrudstuen (April 19, 1877—July 12, 1934) was a Norwegian-American inventor, famous for the invention of the first outboard motor with practical commercial application. Following this, motorised water sports became popular in the late twentieth and early twenty-first century. The most popular modes have been speedboats, jet boats, and ski jets – also known as aqua bikes, wet bikes, water scooters, water motorcycles, and water bobs (Schemel, 2001).

The origins of surfing occurred in the Pacific cultures (Orams 1999). The history of surfing has records of Polynesians using 'belly boards' circa 300 ACE (San Diego State University 2004), and surfing is reported to have originated in the tenth century (Brasch 1995). For example, the Christian missionary William Ellis (1794-1872) recalls that Kaumualii, the great mo'i (king) from the island of Kauai in Hawaii, was renowned as an accomplished surfer. Ellis also recalls seeing the elderly big island chiefs Karaimoku and Kakioena, balancing themselves on their long narrow boards, or splashing about in the foam, with as much satisfaction as youths of sixteen (http://surfart.com/surf_history/kings.html accessed July, 2007). In the late 1800's the surfing buzz arrived in California thanks to George Freeth, and by 1912, surfing was introduced to New South Wales in Australia. Foremost among the 'board shapers' of the 1920's was Tom Blake, who in 1930 patented his 'Hawaiian Hallow Surfboard', and went on to produce it commercially. During this time surf clubs grew and a growing number of automobile ownerships meant that the surfers became mobile in search of the 'perfect wave' therefore extending the presence upon different beaches in California, Hawaii, Australia, and elsewhere.

Surfing entered a golden age in the 1950's, with board construction based upon fibreglass and resin. Surfers were young and the emergence of the 'teenager' market and the post war economic boom generated an excitement. Credence to the new 'surfing lifestyle' was provided by the long term success of the 'Beach Boys', the programme soundtracks and the 'Aloha T-Shirts' worn by the stars of the show. Today, surfing has become the fastest growing water sport in the West of Ireland and conditions in selected beaches are quoted as the 'best surf outside Hawaii' (Irish Times, 2005). Technological advances in wet-suits have played a significant role in the growth of surfing in the 'colder' Atlantic waters. By comparison, windsurfing is a comparatively young sport in that it has a history of little more than four decades. The development of the sport is a history of chance, technological development, the enthusiasm of individuals and the role of company marketing plans (Ryan 1997). Surfing, windsurfing, and long-term ocean voyaging share one commonality; they can be a sport, leisure, tourism, or recreation experience, as well as a lifestyle (Pearson 1979; Macbeth 1985; Orams 1999; Jennings 1999).

Kayaking has a longer history than windsurfing with its beginnings as a traditional Inuit mode of travel in Arctic and Greenland waters (Effenev 1999). Whitewater rafting, similarly, has a history founded in indigenous people's means of transportation, for example, Inca rafts (Paine 1997). In the United States, white water rafting was used by non-indigenous people for hunting and trading as well as exploration in the late nineteenth century. Its founding as a sport or recreation experience is associated with running various sections of the Green and Colorado rivers (Jonas 2005).

Sport fishing and game fishing had their beginnings in 'fishing for survival'. They were popular sports in the 1950s and 1960s for those who could afford it. Today, fishing has become a popular sport motivated by the challenges of competition. It continues to attract participants, however, there are a number of barriers that exist including licensing issues, access to the water, the cost of the activity and falling stock levels.

In the rise of scuba diving, Jacques Cousteau and Emily Gagnan are primarily responsible for the development of the 'Self-Contained Underwater Breathing Apparatus' (SCUBA). This piece of equipment was originally designed for scientific and government use. However, the media of television and movies helped to popularise it as a recreational activity. It is almost 50 years old (West 1990) and is a key tourism product that is marketed by countries on the coast worldwide.

Tourism development has been spatially focused on the beach for much of the post war years, as witnessed, for example, in the slogan the four 'S's' of tourism – sun, sand, surf and sex – the coastal and marine environment as a whole has become one of the new frontiers and the fastest growing areas of the world's tourism industry (Miller and Auyong, 1991). The attraction to the seaside and interest in natural scenery, including the sea emerged in the 1700s. It was reflected in the art and writing of the time. By the 1800s painters such as Turner and Constable were painting coastal scenes while French poets such as Saint Amant were praising seascapes (Corbin, 1994). The medical profession also played a significant role in prompting the growth in popularity of coastal holidays. From as early as the mid eighteenth century some doctors advised patients to travel to the coast for their health (Gilbert, 1953). In 1750 Dr Richard Russell published his treatise on the benefits of seawater in treating diseases of the glands. Russell was the instigator of the 'seaside mania' that transformed English resorts (Gilbert, 1953).

The seaside resort was an eighteenth-century invention, as 'orthodox' medicine put a 'scientific' veneer on popular sea-bathing customs and marketed the result as a supplement or alternative to 'taking the cure' at a spa (Fisher, 1997). The development of transport infrastructure, particularly the railways allowed access to natural environments far easier and more comfortable and therefore increased interest in visiting the seaside for recreation. As a result seaside holiday towns emerged throughout coastal Europe (Towner, 1996). The fashionable elite began to desert traditional inland spa resorts like Bath in the UK in favour of seaside resorts such as Brighton. The beginnings of sea-based tourism can be identified in England in the early part of

the seventeenth century, it did not occur in France until the 1780s, with Belgium, Germany and Holland following in the 1790s (Walton and Smith, 1995). Spain was much later in the 1820s and 1830s. Walton (1983) argues the attributes and traditional associations with seaside resorts were invented by Victorian traditions and describes them as childish innocence (buckets, spades and sandcastles), nature (starfish, rock-pools and gulls as well as the power and tranquillity of the sea itself), simple 'old-fashioned' fun (donkeys, roundabouts, Punch and Judy, boat trips, beach entertainers), and tasty, informal seaside food: fattening, glutinous and eaten out of the bag while on the move, in defiance of conventional table manners (fish and chips, ice cream, candy-floss, cockles and whelks).

In Ireland seaside resorts became popular destinations for holidaymakers and day trippers with the coming of the railways. Sea-bathing, which became fashionable in England from the 1750's does not seem to have been so popular in Ireland at this early date (Garnham, 2007). Small resorts, such as Blackrock and Howth, developed from around 1820, catering almost exclusively for visiting Dubliners. By 1880 the railways carried industrial workers and the urban middle classes further afield. Dubliners now visited Skerries, Portmarnock, Dalkey, and Bray. From Belfast workers travelled to Bangor and Newcastle in Co. Down, and to Portrush in Antrim. From Derry, Portrush and Bundoran in Co. Donegal were accessible. Resorts became venues for theatres and sports, though the English-style pleasure pier was totally lacking (Garnham, 2007). Regular ferry services encouraged visitors from Britain, but these sailings were suspended on the outbreak of war in 1914, and never re-established on the same scale. The fortunes of resorts fluctuated with the economic climate, but their heyday came in the years immediately after 1945. The population was now wealthier and more mobile, with more leisure time. Ireland's only seaside holiday camp, run by the well-established English firm 'Butlins', opened at Mosney, Co. Louth, in 1948. By the late 1960s cheaper foreign holidays undermined the domestic trade of resorts. From 1969 the Northern Ireland conflict further accentuated the decline of resorts there. In the Republic, despite some limited success with initiatives such as the staging of equestrian events, the growth of foreign tourism has done little to arrest the decline of the traditional resorts, which continue to rely on a dwindling number of domestic day trippers (Garnham, 2007).

The United States followed a similar pattern to Europe, and while there are records of holiday visits to coastal locations such as Nahant and Cape May from the late eighteenth century, the development of better-known coastal holiday locations, such as Newport, Palm Beach and Atlantic City, did not occur until the mid-nineteenth century (Towner, 1996). However, whilst this growth is an important feature of the development of marine tourism during this time, much of the activity associated with these coastal holidays was in fact dominated by activities centred on social gatherings, entertainment such as theatres, amusement arcades, parks and shopping and for men in some locations, public houses, gambling and prostitution (Walton, 1983). Nevertheless, the sea was a major attraction and activities such as swimming, walking along the promenade and out on piers, and watching boat races were common. Today, Salthill in Galway in the West of Ireland still retains 'the traditional seaside entertainment activities' such as gambling

and public houses. However, the main attraction to visitors and what draws tourists to Salthill is the beaches, the sea, festivals and events (Galway Visitor Survey, 1999 and 2005).

Through recent decades, significant advances in technology and the increase in international travel have made marine environments more accessible in both real and economic terms. Coastal and marine tourism has become a huge business that forms a significant component of the growing global tourism industry (Orams, 2001). The historical developments of marine tourism discussed, highlight the many business opportunities available in water-based recreational products. In the past, most of the marine environment was protected from tourist use by its inaccessibility, safety concerns and the relatively high cost of recreating in the sea. Marine tourism has now expanded dramatically over the past decade and today there are a diverse range of water-based activities available to visitors in Ireland and overseas, this is discussed in detail in section 3.2.3.

3.2.3 Marine Tourism Product Structure

When the development of marine tourism is traced, the most obvious features that emerge are, first, that it has become increasingly popular and, second, related to that popularity, that it has become increasingly diverse (Orams, 1999). Today there are more ways to access 'the marine world' for recreation than ever before. With technology advances and product innovations, business managers have got smarter and more creative with selling marine leisure products and therefore increasing marine tourism participation levels.

The literature highlights the majority of recreation occurs close to people's place of residence (Jennings, 2007) and this is also true of marine recreation. According to the Marine Institute in Ireland, water-based tourism recreational pursuits can be categorised as active or passive. Table 3.1 highlights the range of activities in each category. This list is not exhaustive but illustrative of the diversity of marine tourism activities.

Table 3.1: Water-Based Tourism and Leisure Pursuits

Active Water-based Pursuits	Passive Water-based Pursuits
Pleasure Boating	Boat visits to Islands
Sailing	Aquaria
Wind/Board Surfing	Maritime Museums/Interpretative Centres
Water skiing	Beaches and Coastal Recreational
Scuba Diving	Coastal Passenger Boats/Pleasure Cruises
Sea Angling	Inland Passenger Boats/Pleasure Cruises
Coarse Angling	Nature Tourism
Sea Kayaking	Marine Mammal Watching
Canoeing	Coastal/Lake Touring Routes
Swimming	Cruise Ships

Source: Investment Programme 2000-2006 for Water-based Tourism and Leisure Sector in Ireland - The Marine Institute, Ireland.

In economic terms marine tourism recreational pursuits can be classified as ‘free activities’ or ‘paid activities’ (Ginty, 2007). Table 3.2 provides a summary of the type of activities in each category. ‘Free marine tourism pursuits’ are defined as water-based activities that are enjoyed at no direct cost to the user, usually onsite at the location of the coastal or inland waterway area. However, there is an important economic value attributed to this type of tourist depending on their status whether they are local, domestic or international, they spend money on food, drink, accommodation, petrol or other daily needs.

Table 3.2: Free versus Paid - Marine Tourism Activities

Free Marine Tourism Activities	Paid Marine Tourism Activities
Swimming in the Sea Recreational Trips to the Beach or Seaside Coastal & Inland Waterway Routes for Walking/Running/Climbing Coastal Bird Watching	Pleasure Boating Boat visits to Islands Sailing, Canoeing, Sea Kayaking Wind/Board Surfing/Kite Surfing Maritime Museums/Interpretative Centres/Aquaria Mammal Watching Water Skiing Scuba Diving Coastal & Inland Passenger Boats/Pleasure Cruises Inland Passenger Boats/Pleasure Cruises Sea & Coarse Angling

Note this should be seen as a continuum from free to paid marine tourism activities.

Source: Ginty 2007, Marine Tourism Product Audit

On the other hand ‘paid marine tourism pursuits’ can be defined as water-based activities purchased from a marine tourism business operator per hour, day or by the week. With regards ‘paid marine tourism pursuits’, equipment and tuition is provided or a license to undertake the activity in the area.

The marine tourism business providers can be classified as ‘operators’ or ‘associates’. The operators issue licenses or provide marine tourism products for hire or activity experiences/coaching for daily, weekly or hourly rates. Marine tourism operators provide one to many water-based activities ranging from just fishing or scuba diving to a range of water sports including surfing, canoeing, water skiing and others. On the other hand marine tourism associate businesses typically provide related equipment and angling supplies for sale to businesses, boat owners, and tourists such as surfboards, wetsuits, bait, rods and other items. The marine tourism business sector in the West of Ireland is discussed in detail in Chapter Seven.

Choices in marine leisure and recreation experiences can range from easy to extreme, low to high impact, individual to team pursuits, casual to committed participation, modest to sophisticated equipment usage, and from relatively inexpensive to expensive set-up and participation costs (Jennings, 2007). There is a complex array of marine tourism activities available, with some complementary and many not. Nevertheless, the activities create many management challenges to marine tourism operators and associates, local authorities and national government

departments, international marine protection agents and marine scientists. The next section will discuss the impacts of marine tourism presents and the challenges it presents to Government, scientists, businesses, consumers and researchers.

3.2.4 Impacts of Marine Tourism

Impacts of marine tourism can be broadly categorised as economic, ecological, social and physical. The major types of marine tourism impacts put forward by Harriott (2002) and META (2005) include;

- I. visitor spending (goods and services supply and demand, employment, investment, leakages);
- II. coastal tourism development (population pressures, holiday homes, construction activities);
- III. island-based tourism infrastructure (marinas, sewage discharge, construction);
- IV. marine-based tourism infrastructure (pontoons, moorings, fish feeding);
- V. boat-induced damage (anchoring, ship grounding, litter, waste discharge);
- VI. water based activities (diving, snorkelling, reef walking, fishing);
- VII. marine wildlife interactions (seabirds, whale-watching, dolphin or seal watching).

In the early stages of tourism development, the impacts were largely reviewed as positive, particularly with regard to their influence on the economic development of a region or a country (Orams, 2001). However, in recent times it has been recognised there are costs associated with tourism development. Some analysts have been quite dramatic in their assessment of the impacts of tourism. For example, Croall (1995) argues that a spectre is haunting our planet: the spectre of tourism. Today, in the modern guise of tourism, it can also ruin landscapes, destroy communities, pollute the air and water, trivialise cultures, bring about uniformity, and generally contribute to the continuing degradation of life on our planet.

According to the META (2005), marine ecotourism is particularly sensitive to the presence of other industries, which by implication suggests that inter and intra sectoral integration is not easy to initiate. As a consequence it is difficult to adapt an integrated approach to planning when the impacts of marine ecotourism can affect many different industries, authorities and interests. Table 3.3 highlights the industry sectors that have a stake or an impact upon marine ecotourism activities.

Table 3.3: The industry sectors that may have a stake or an impact upon marine ecotourism activities

- Agriculture
- Coastal & Ocean Research
- Dredge & Spoil Disposal
- Fisheries
- Forestry
- Housing
- Mariculture/Aquaculture
- Marine Industry & Power Production
- Military Areas & Facilities Ocean Engineering & Technology
- Oil & Gas Extraction
- Ports/Harbours/Marinas
- Protected Areas
- Shipping & Navigation
- Solid & Hazardous Waste Disposal
- Sport Fishing
- Water Pollution/Pollution Control
- Wildlife Management
- Nature Conservation
- Water Supply

Source: META, 2005

There appears to be a consensus in the literature on tourism that demand for opportunities to interact with nature, including marine environments, has been increasing rapidly (Smith and Jenner, 1995). This general interest in nature, marine settings and experiences based upon them is reflected in an increasing demand and value being placed on relatively undisturbed coastal environments and, in particular, wild animals (Guthier, 1993). Increasing interest in wildlife viewing has given rise to a vast range of wildlife tourism products to cater for this growing demand (MacLellan, 1999). The marine environment lends itself well to this type of tourism. This is evident from the numerous commercial dolphin and whale watching ventures appearing worldwide which have evolved from an industry of wildlife viewing in aquaria to viewing animals in the natural environment. These engaging and mysterious animals have provided an opportunity for the development of marine leisure activities such as whale watching tours. In Newfoundland in Canada, whale watching is the main marine tourism attraction that has a positive impact on the economy (see Appendix 2 for a Case Study⁶ on Marine Tourism in Newfoundland). The dramatic rise in popularity of wildlife tourism has also created a market for

⁶ In 2007 the author undertook research in Newfoundland supported by the *Ireland Newfoundland Partnership* and this is documented in a case study in the appendices titled 'Newfoundland's marine tourism resources and performance').

interactive experiences such as dolphin feeding and dolphin swimming programs. The economic benefits of such growth are substantial. However the impacts on wildlife can often be negative causing marked changes in behavioural and social ecology leading to reduced fitness and higher levels of mortality (Reynolds, Braithwaite and Pongracz 1996).

This non-consumptive use of wildlife has commonly been approached as a form of sustainable development (Arnold and Birtles 2001, MacLellan 1999). Yet when tourists are involved in wildlife viewing or interaction there is typically an impact on the animals even if at times tourists are unaware of this. The presence of tourist activity can cause a range of direct and indirect impacts on wildlife which include: disturbance leading to modification of activity patterns, habituation, aberrant social behaviour, dietary distortions, reduced fitness and reproductive output, increased predation (a relation between organisms or animals in which one feeds on the other), altered community structures, abandonment of home ranges, and habitat modification and pollution (Reynolds and Braithwaite, 2001).

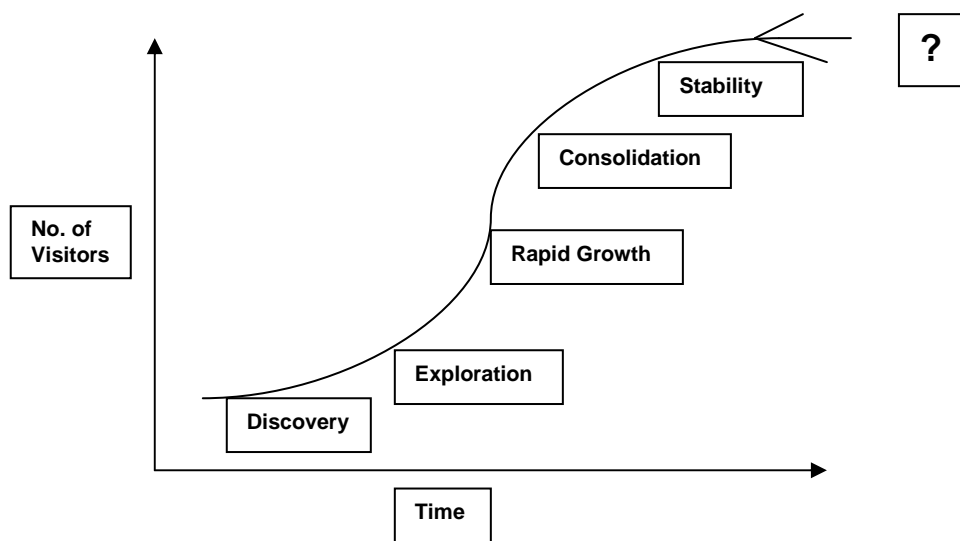
The building of holiday homes in coastal and marine tourism locations is another example encompassing economic, social and physical environmental impacts. The impacts in this situation are both positive and negative. Second and holiday homes touch on a diverse range of factors that affect the sustainability of rural and remote coastal communities. These factors, such as housing, services and facilities, local economies and social and cultural vitality cut across a variety of policy areas, requiring effective partnership working between agencies and rural communities. For example, in January 2006, Scanlon from the Sunday Business Post, reported on holiday home developments in Donegal, Ireland. The article highlighted the county councils ban on the building of holiday homes in some parts of Donegal. This ban was implemented following hundreds of emotive submissions from members of the public overwhelmingly rejecting a proposed holiday development plan. Many of the submissions claimed there were more holiday homes than permanent homes in areas such as Downings and parts of Inishowen. A huge number of submissions were also received from people living in the Inishowen area calling for the peninsula to be designated a 'green box area' to protect it from overdevelopment. As a result the Donegal county manager at the time, Michael McLoone proposed that part of the county be made 'exclusion zones' for holiday homes.

Similarly, research undertaken in Scotland on the impact of holiday homes (Bevan and Rhodes 2005) provided a distinction between second homes and commercial holiday lets in terms of impacts on rural communities. Both second homes and properties let out commercially for holidays have an impact on the supply of accommodation in a local housing system (i.e. the balance between effective and ineffective housing stock). The research revealed holiday lets were seen as important direct sources of income for local people, as well as the additional general spend that tourists might bring to an area. Whilst second homes were generally viewed as less beneficial. A further concern was the extent to which second and holiday homes were occupied throughout the year.

In Ireland, on a regional level holiday homes have had a negative impact in some areas. This is evident in the seaside town of Roundstone in Connemara, Co. Galway where property prices tripled from 2000 to 2007 (Ginty, 2007). This was driven by a number of factors linked to the booming Irish economy at the time including; the rise in the cost of living, low supply and high demand for holiday homes in the area, the local city dwellers known as 'cash rich and time poor' and those who were looking for a 'rural coastal getaway' in close proximity to their main residence. In Roundstone, the knock on effects of holiday home developments resulted in a lack of affordable accommodation for staff working in the area particularly during the high season where a typical house is let for €1,200 per week in 2007 (Ginty, 2007). A business case study is presented in Chapter Seven which discusses in more detail the Roundstone business community, its marine tourism assets, its challenges and performance. Since 2008 house prices have been falling due to the global economic downturn. According to the CSO (2009), from August 2008 to July 2009, national property prices were down by 13.0%. This compares to a decline of 12.5% recorded in the 12 months to July 2009. The average price for a house nationally in August 2009 was €235,260, compared with €261,573 in December and a peak of €311,078 in February 2007. National prices have fallen 24.4% since this price peak.

Because of the highly dynamic nature of the coastal environment any development which interferes with the natural coastal system may have severe consequences (Cicin-Sain and Knecht 1998). Stankey (1985) introduced the concept of 'recreational succession' which describes the gradual deterioration of a tourism site as it became increasingly popular with visitors. For example, a pristine natural site is discovered and used for recreation, following this deterioration of the site's natural attributes occurs. Consequently, initial visitors, who were attracted by the pristine unspoilt surrounds, move on and are replaced by greater numbers, with lower expectations of environmental quality. In the meantime, the initial 'discovering group', have moved on and explored and discovered another pristine site and therefore have started the chain of recreational succession again elsewhere (Stankey (1985). The overall result of recreational succession is a gradual 'creep' of development facilities and infrastructure and a gradual loss of wilderness and environmental quality.

Figure 3.2: Tourism Life Cycle Model (Butler, 1980 and 1990).



Butler's (1980 and 1990) 'Tourism Life Cycle Model' (Figure 3.2) is related to the concept of recreational succession (i.e. the possible stages in the development of a tourism attraction). Butler argues that a tourism destination or attraction passes through a number of general stages as it becomes more popular. This model reflects the typical 'product life cycle' concept (see Kotler, 2002) which is widely used in the marketing and business management areas that highlights a product will follow a 'birth-growth-maturity-decline' development pattern. This kind of general development path has been observed in long established whale-watching locations (Forestell and Kaufman, 1995) and has relevance to a number of marine tourism cases.

The exact number of marine tourists remains unknown. Nevertheless, the selling of 'sun, sand and surf experiences', the development of beach resorts and the increasing popularity of marine tourism has all placed increased pressure on the coast, an area for which use may already be highly concentrated in terms of agriculture, human settlements, fishing and industrial location (Miller 1993; ESCAP 1995a, 1995b). In 1997 in the United States, the national Oceanic and Atmospheric Administration (NOAA) recognised that of all the activities that take place in the coastal zones and the near-shore coastal ocean, none is increasing in both volume and diversity more than coastal tourism and recreation. Both the dynamic nature of this sector and its magnitude demand that it be actively taken into account in government plans, policies, and programmes related to the coasts and ocean.

One of the greatest challenges facing coastal managers is how to integrate tourism development within the range of coastal management, and therefore increase the likelihood of long-term sustainability of the coast as a whole (Timmerman and White 1997; Cicin-Sain and Knecht 1998). Solving such dilemmas will clearly be of importance to many countries around the world which has substantial emphasis on marine and coastal tourism, particularly when environmental quality becomes another means to achieve a competitive edge in the tourism marketplace (Hall and Page 2006).

3.3 About Marine Tourists

3.3.1 Marine Tourist Motivations

Each marine tourism resource is perceived in a variety of ways by different individuals and groups. There is a need to understand the fundamental difference in the user's perception of the water-based activity, the developed coastal resort and the nature of the natural environment, such as the beach, sea, coastline or inland waterway. The behaviour and activities of coastal tourists and recreationalists are therefore vital to understanding the nature of the problems and impacts which occur as well as what motivates the tourist to engage in any water-based pursuit.

Based on the growth of the tourism industry in recent decades and the tourism trends discussed in Chapter Three, most people want to travel. The experience is seen to offer adventure, an opportunity to relax, or the thrill of seeing new places and encountering people and cultures in far-off lands (WTO, 2007). Those who leave home for purposes of leisure prefer to be seen as travelers, guests, visitors, adventurers, possibly even explorers (Harrison, 2003).

As discussed in section 3.2, the types of water based recreational activities are diverse and so are the participants in those activities. However, there is evidence which shows marine tourists do differ demographically from the general population, particularly when specific activities are considered. It can also be argued that the motivations, and the experience that participants seek, are directly influenced by the medium in which the activities occur, namely, the sea (Orams, 1999).

A motive is an internal factor that arouses and directs human behaviour (Iso-Ahola, 1989). Discovering people's motivations is difficult as motivations cannot be observed, they can only be inferred from observing behaviour. The concept of motivation for recreation or leisure has been widely explored in the literature and a variety of theory has been developed (Ewert, 1989). Crompton (1979) has argued that, at a basic level, humans are motivated to travel by curiosity. The desire to see what is 'over the horizon' or perhaps in the marine situation what is 'under the horizon' may be an important reason why individuals undertake exploration-based activities such as sea kayaking, scuba diving, snorkeling and yacht cruising.

Gray's (1970) 'wanderlust'-'sunlust' theory explains that the motivation for leisure travel can be explained by a desire to escape the familiar and experience different environments, activities and people. Related to this is the 'sunlust' – the seeking of a setting that is perceived to be better for particular recreational activities. These two concepts have obvious application to the marine tourism situation because first, marine environments are different and offer an opportunity to escape normal routines and surroundings. Second, marine recreational activities are setting dependent and influenced by weather conditions.

The 'optimal experience theory' put forward by Csikszentmihalyi (1975) has relevance to a number of marine recreational activities. Csikszentmihalyi contends that when participants engage in an activity which matches their skill level with the challenge provided by the activity, a psychological state, which he terms being 'in the flow', is achieved. This 'flow' state has also been termed 'peak experience' and studied in risk recreation (Haddock, 1993). These ideas of 'peak experience' or being 'in the flow' and having a need for feelings of competence are of interest in the marine situation, because most marine recreational activities contain an element of challenge and risk which is part of the attraction for participants.

3.3.2 Marine Tourist Characteristics

It is difficult to make generalisations about the characteristics of marine tourists, because within every water-based or marine recreational activity there will be a broad range of age groups and genders represented with a wide variety of motivations and interests.

Table 3.4 Who is Participating?

Classification of marine tourists can be based on the level of dedication and time commitment given by those participating in a broad range of marine tourism experiences:	What type of Water-Based Activity Operator provides this?	Who engages in this activity?
Hard Core Marine Tourists: scientific marine biologists/researchers or members of tours specifically designed for education on the marine environment.	Boat & Marine Guide Services for Research or Educational Trips.	Marine Scientific Professionals - High Level of Knowledge & Skill required.
Dedicated Marine Tourists: People who take trips specifically to see a protected area and want to understand local natural and cultural marine history.	Aquariums, Whale/Mammal Watching Tours, Lighthouse Tours, Maritime Museums, Tall Ship Tours, Marine Bird Islands, Coastal Walking Tours, Island Safari's.	Marine Tourists who understand the marine environment, take annual holidays alone, as a couple or primarily with families or to gain knowledge and appreciation.
Mainstream Marine Tourists: Those who visit natural coastal and inland waterway destinations primarily to undertake a marine tourism experience.	Water-Based Adventure Centres, Surfing, Sailing, Cruise Ships, Scuba Diving, Sea/Fresh Water Lakes Angling, Sea kayaking, Coastal Bird Watching.	Skillful Marine Tourists who have the know-how and the need to engage in their water-based activity on a regular basis or a marine tourist starting off seeking to 'learn' a water-based activity.
Casual Marine Tourists: people who experience marine tourism activities incidentally as part of a broader based holiday.	Trips to the Beach/Seaside, Swimming in the Sea, Trips to Islands, Pleasure Boating, Canoeing.	Families, couples, those traveling alone to the seaside or lakeside for relaxation undertake ad hoc 'marine tourism experiences' as part of their holiday.

Source: Incorporating Marine Tourism Business Audit Findings Ginty (2005 - 2007) and including adaptation and modification of Lindberg Policies (1991) and META (2004).

In contemporary times, the nature of participation in niche tourism, sport, leisure, and recreation is influenced by a number of factors, such as time, finances, family life cycle, and participants' perceptions of skills, risk, novelty, adventure and challenge (Jennings 2007). It is possible to detect broad differences and similarities between different groups of marine tourists engaging in different types of marine tourism activities. However, no widespread agreement has emerged as to how the marine tourist market as a whole should best be segmented for marketing and development purposes. Table 3.4 and 3.5 are suggested ways of classifying different kinds of marine tourists.

Another useful framework is based on 'hard' and 'soft' tourism as an ideal type against which the characteristics of actual tourists can be measured. Table 3.5 illustrates these 'types of tourists' in relation to marine tourism. In most cases, particular marine tourists (or groups of marine tourists) will fall somewhere between these two poles.

Table 3.5: Hard and Soft Marine Tourism

HARD (Active, Deep)	Marine Tourism Spectrum	SOFT (Passive, Shallow)
	← ————— →	
Strong Commitment		Moderate or Superficial Commitment
Specialised Trips		Multi-Purpose Trips
Long Trips		Short Trips
Small Groups		Larger Groups
Physically Active		Physically Passive
Physical Challenge		Physical Comfort
Deep interaction with marine nature		Shallow interaction with marine nature
Emphasis on Personal Experience		Emphasis on Interpretation
Make own Travel Arrangements		Rely on Travel Agents & Tour Operators
Support Services Expected in the Area		All Services Expected in the Area
Environmental Protection Aware		Low – Moderate Understanding of Environmental Protection

Source: Weaver (2002) adaptation and modification incorporating Marine Tourist Survey (2004) and Marine Tourism Business Audit, West of Ireland, Ginty (2005 - 2007).

For a number of water-based activities a demographic pattern exists where activities are perceived as more 'adventurous' or having a higher risk of injury, such as surfing, sailing or scuba diving tend to be dominated by males and younger age groups. Those activities that are more 'passive' or social tend to be dominated by older age groups and in some cases by females (Orams, 1999). An additional generalization that applies to most marine activities is that they tend to be patronized, relative to other land-based recreational pursuits, by upper socio-economic groups. This is understandable given the often significant equipment or fees associated

with marine activities such as boats, yachts, surfboards and scuba gear. In addition, coastal areas have become the most desired and expensive places for homes, resorts and other developments.

Research on the socio-demographic characteristics of specific marine recreational activities is scarce. However, a number of studies have been undertaken and it is clear, for example, that the cruise-ship industry attracts older and relatively wealthy clients. Data from the North American market, which forms more than 80% of all cruise-ship passengers, show that the mean age of passengers is 50 years and the mean income \$US63,000 (Peisley, 1995). However, research undertaken by the Caribbean Tourism Organisation in 1993 indicated that cruising is no longer the preserve of the wealthy elderly. Cruise passengers are increasingly younger and from more moderate income groups than in the past. Most (68%) are married and 58% travel with their spouses and few (only 6%) travel alone. According to Walker (2008), the cruise business is reported to be a combined \$US32.4 billion industry and only 10% of the potential cruise market has been tapped.

Research on whale watchers shows that they also are predominantly from higher-income and older age groups and are relatively well educated (Forestell and Kaufman, 1990; Neil, Orams and Baglioni, 1996). However, there is a greater proportion of females who participate in whale watching (Neil, Orams and Baglioni, 1996). This tendency has also been recorded with dolphin swim participants (Amante-Helweg, 1995). Passive activities, such as beach walking, sunbathing and swimming show a much more diverse demographic profile (Anderson, 1994).

Murphy (1985) identifies two general categories of tourist typologies, interactional and cognitive-normative. For example, interactional typologies, Cohen (1972) proposes a four-part tourist typology, based on the tourist's desire for familiarity and the level of institutionalisation preferred. Other similar interactional tourist typologies have been based on trip indices (Uysal & McDonald, 1989), travel behaviours, interests, and opinions (Perreault et al., 1977). Interactional typologies have also been identified on a regional (Ditton et al., 1975) or site basis (Collins & Hodge, 1984). Interactional tourist typologies are used in ecotourism studies which identify ecotourists based on activities (Eagles, 1992). In contrast, cognitive-normative tourist typologies focus on the travel motivations of tourists. For example, Plog's (1972) recognises allocentrics (adventurous, individual travel), mid-centrics (individual travel to destinations with facilities), and psychocentrics (packaged holidays to popular destinations), depending on how tourists conform to societal or individual desires. Cognitive-normative typologies have also been applied to more specific outdoor user groups (e.g. Snowmobilers; May et al., 2001). Information needed to develop cognitive-normative typologies usually comes from interviews, but occasionally by self-designation (Kaynak and Yavas, 1981). Cognitive-normative typologies have been used to identify ecotourists on the basis of their motivations (Ballantine and Eagles, 1994), attitudes (Luzar et al., 1998), and values (Blamey & Braithwaite, 1997). There are several criticisms of tourist typologies. For example generalisations from a typology are restricted to the data that created the typology (Lowyck et al., 1992). Also without methodological consistency, the names

chosen for tourist categories vary widely and strongly reflect the researcher's point of view (Sharpley, 1994).

Nevertheless, Brotherton and Himmetoglu (1997) 'Special Interest Tourist' (SIT) typology best describes the possible 'types of marine tourists' that can exist and variety of participation. The typology consists of four groupings with particular characteristics. This is explained in Table 3.6. participation begins with 'inexperience', where emphasis is on the destination and 'dabbling' in the activities available (Brotherton and Himmetoglu, 1997). Ongoing involvement moves the participant to become an 'enthusiast'. Further involvement results in the developed interest in the activity, following this the 'expert' stage is reached. Here destination choice is dependent on availability of the preferred activity, which is likely to result in a more adventurous form of vacationing (Brotherton and Himmetoglu, 1997).

Table 3.6: Special Interest Tourist (SIT) Typology

Dabbler	Enthusiast	Expert	Fanatic
<ul style="list-style-type: none"> - Comfortable with other inexperienced participants. - Focus on safety in involvement decisions. - Choice depends on attitude to risk, with decision likely to be fashionable or contemporary. - Need persuasion by marketers to participate. 	<ul style="list-style-type: none"> - Progressed from sampling to experience. Social element an important component. - Activity likely to be a lifestyle enhancement, not a complete change of behaviour. - Seeks new but not overly demanding opportunities to practice interest. 	<ul style="list-style-type: none"> - Extensive knowledge and skill with activity. Activity central to life and focus of lifestyle. - Activity central to self-identification with equipment and challenging environment is vital. - Ongoing development and learning provide stimulation and challenge. 	<ul style="list-style-type: none"> - Extreme levels of involvement with activity. - Activity dominates travel choices. - Poses a marketing challenge with specialization beyond standard packages. - Highly skilled at activity with own equipment and technical experience.

Source: Adopted from Brotherton and Himmetoglu (1997).

Moscardo, Pearce, Green and O'Leary (2001) examined the similarities and differences in demand for coastal and marine tourism activities and experiences from three European markets. Long-haul travellers from the United Kingdom, Germany and The Netherlands were studied using archival survey data. The research explored the similarity of the demand from these markets in order to address the question of whether proposals to shift mass tourism towards smaller scale alternative types of coastal and marine tourism are consistent with the size of the ecotourism market.

One feature of these results is the distribution of the types of coastal and marine tourists across the three samples. Eco-coastal visitors make up only 19% of the UK sample, but are the largest group, at 46%, of the German coastal and marine tourists. The largest UK group was the passive seaside group at 51%. This was the smallest group for the German sample at 22%. All of these figures are, however, quite high, when compared to other empirical investigations of the

distribution of ecotourists within international tourist populations. An analysis of similar survey data found that 16% of Australians, 15% of Japanese and 6% of Taiwanese international long-haul travellers were interested in ecotourism experiences (Woods and Moscardo, 1998). This would suggest that the European figures are generally high which is consistent with general conceptions that ecotourism is more popular with Northern European and North American travellers (Middleton, 2001).

The results of this study demonstrated that nationality was an important variable shaping the size of the ecotourism markets with budget-oriented German eco-tourists (46%) providing the largest market share of German coastal and marine tourists. By way of contrast UK ecotourists were the least cost conscious, but were only 19% of the total UK coastal and marine tourism sector. Furthermore this study highlighted (see Table 3.7) the profiles of each of the coastal and marine tourist types. In all three nationality samples the tourist groups shared numerous common characteristics including an interest in seeking new destinations for each trip, an interest in cultural tourism and they gave high importance ratings to opportunities to increase knowledge.

Across all three samples the active beach group shared similar activity profiles with high levels of interest in all physical and sporting activities and an emphasis on fun, entertainment and novelty. The passive seaside groups were also similar in that they primarily sought escape and relaxation. While the similarity of the groupings of activities and experiences is highly consistent across the nationality groups, this similarity masks the fact that the people wanting these experiences are quite different. For example both the UK and the German groups are older and express a preference for group tours and high levels of tour organisation whereas The Netherlands respondents in the eco-coastal cluster are both younger and do not want to be a part of escorted groups. The finding here is analogous to other tourism studies where a set of experiences such as watching trains and being interested in rail may be shared by such different demographic segments as eight year olds and eighty year olds (Pearce, 1988).

Table 3.7: Key Attributes of the Coastal & Marine Tourists

Attributes	UK	Germany	The Netherlands
<i>The active beach group</i>			
Highest importance ratings for physical activities	✓	✓	✓
Lowest ratings for learning and for ethnic and cultural tourism	✓	✓	✓
Youngest group	✓	✓	
Want flexibility and variety in travel and destinations	✓	✓	
Not budget conscious	✓		✓
Most likely to have and travel with children	✓	✓	
Budget conscious		✓	
Want package tours			✓
<i>The passive seaside group</i>			
Lowest importance ratings for physical activities		✓	✓
Visiting Friends and Relatives and Relaxing	✓	✓	
Budget conscious	✓		
Lowest incomes and education	✓		
Not budget conscious		✓	
Oldest group			✓
Somewhat budget conscious			✓
<i>The eco-coastal group</i>			
Importance ratings for increasing knowledge, seeking cultural and nature opportunities	✓	✓	✓
Lowest ratings for all physical activities	✓	✓	
Oldest group	✓	✓	
Seek package tours	✓	✓	
High yield	✓	✓	
Seek new destinations for each trip	✓	✓	✓
Somewhat budget conscious		✓	✓
Not package tours			✓
The most status conscious			✓

Source: Moscardo, Pearce, Green and O'Leary 2001

Determination of participation rates in water-based experiences is problematic. This is essentially the case because:

- Some activities are not required to report participation.
- Some activities are independent in nature and there is no need for reporting.
- Equipment purchases are not sound basis for prediction, as some equipment may be lent, cooperatively shared, rented, or resold.
- Equipment purchase numbers fail to identify persons who may own multiple sets of equipment, therefore resulting in multiple counting.
- Equipment purchase does not always indicate actual participation.
- Legislation does not require all activities to be registered.
- Not all participants comply with legislative requirements such as registration.
- Certification of activities does not allow capture of non-certified participants.

- Participation in one activity may mask participation in other activities, depending on which is used for reporting purposes.
- Data sets and empirical materials are dependent on researcher interests and sustained interest in building longitudinal information sets.
- Data sets may be incomplete due to changes in focus of management agencies and niche marketing focusing.
- Changes occur in standards for measurement and methodologies.
- Measurement may be used on adult population only.
- Ambiguity exists in definitions of tourism, sport, leisure, and recreation as well as what is a pursuit, activity, or experience.
- Inconsistency exists in definitions for use in counting and comparison.

(Miller 1993; Wilks and Antherton 1994; Fedler 2000; Jennings 2004.)

This section of the literature review has provided a better understanding of marine tourist characteristics and motivations and further enhanced the discussion on consumer decision making discussed in Chapter 2. Further details on marine tourist participation levels and market profiles is discussed at a global level in section 3.4 and at a national and regional level in Chapter Four of the literature review.

3.4 Marine Tourism Global Performance

3.4.1 Marine Tourism Performance and Market Demand

The marine tourism global market is a difficult sector to gain precise information on, because few countries produce statistics covering all activities. In 2005, Douglas Westwood Report defines marine tourism to comprise seawater and freshwater angling, sailing and boating (both inland and at sea), water-sports and inland cruises. This definition does not encompass the entire marine tourism sector as defined in section 3.1 where marine tourism activities form part of a recreational activity associated with the natural water-based surroundings that can be in the water, land-based, or both. They may be formally organised or undertaken independently. Douglas Westwood estimated the world marine tourism market in 2004 as €168 billion. This figure is approximately 11% of total tourism revenues globally amounting to €1,523 billion (Westwood, 2005).

Table 3.8: Marine Tourism Market Values

Market	1999-03 (€m)	2004 (€m)	2005-09 (€m)
Europe Market €M	328,302	71,812	392,695
World Market €M	762,345	168,189	928,267

Source: All figures from the World Tourism Organisation (WTO) and Douglas Westwood 2005, and account for marine tourism equipment sales only. The WTO and Douglas Westwood figures exclude travel, accommodation and other trips to the beach.

In 2004, the European marine tourism market was valued at €72 billion (Westwood, 2005) and expected to grow at 3% to €393bn from 2005 to 2009. World international tourist arrivals suggests a 4.1% annual growth rate from 1995 through to 2020 with Europe's growth rate lower at 3% over the same period (Westwood, 2005). Applying this same percentage growth to marine tourism suggests a market value of €198 billion in 2009 alone (Westwood, 2005). However, since 2007 there has been a slowdown in the global economy and it is therefore reasonable to assume that the tourism industry and marine tourism sector will suffer over the next few years and growth rates may not be as strong as anticipated in the 2005 Douglas Westwood Global Marine Tourism Report.

Table 3.9: Marine Tourism Market Value Estimates 2004

Market	2004 Market Value (€m)	2004 Market Value %
World	168,189	100%
EU	71,812	42.6%
Ireland	631	.4% of World Market (.8% of EU Market)
Rest of the World	95,746	57%

Source: World & EU figures from the World Tourism Organisation (WTO) and Douglas Westwood 2005, and account for marine tourism equipment sales only. Ireland figures from ESRI, Peter Bacon and Marine Institute 2005 and include travel, accommodation and trips to the beach.

During the 1990's, cruise lines were attempting to become more efficient and competitive by ordering more new vessels, and by maintaining occupancy rates on cruises at high levels – of 85% or more (Baum, 1993). There has been consolidation as cruise lines find economies of scale in production and marketing, and the development of mass market cruise businesses especially in the Caribbean, such as Carnival and Royal Caribbean cruises (Hobson 1993) and Easy Cruise in the Mediterranean markets. The global cruise market was valued at €12 billion in 2004 (Douglas Westwood, 2004) and has grown by 56% since 1999. A study conducted by Cruise Lines International Association (2004) found that cruise vacationers spend considerably more money on their holidays (€1,316 per person per week) than non-cruise vacationers (€917 per person, per week). The European market was valued at €2.4billion in 2004 with over 8.5 million passenger calls in European ports and it was estimated that the cruise sector would grow by 4.4% in 2009 reaching €14.8m (Douglas Westwood, 2004).

Figure 3.3: Marine Tourism World Market Growth

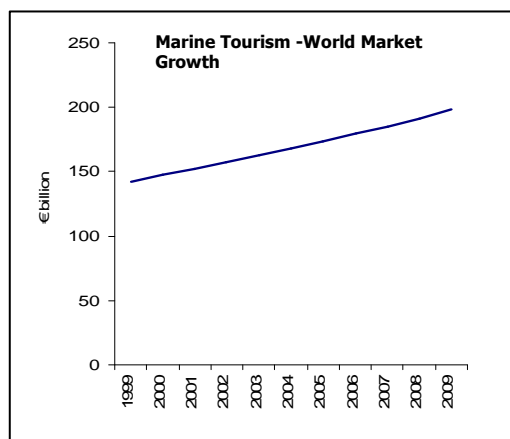
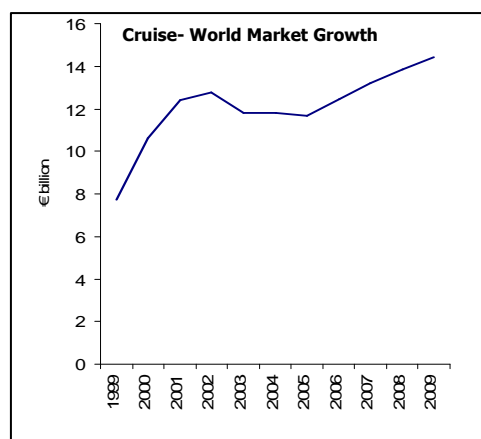


Figure 3.4: Cruise World Market



Source: Douglas Westwood, 2005.

Despite positive growth forecasts in Europe, in Newfoundland, Canada for example there has been a drop in Cruise ship passenger visits, reaching 34,262 during the 2006 cruise season, a decrease of 5% over the 2005 cruise season (Newfoundland Labrador, Dept. of Tourism, Culture and Recreation, 2007). A total of 105 port calls were recorded during 2006, up from the 97 recorded during the 2005 cruise season (Newfoundland Labrador, Dept. of Tourism, Culture and Recreation 2007). The drop in passengers is linked to challenges with marine Atlantic access, economic conditions and terrorism fears. Also the cruise vessels in North America are a lot larger than some of the European cruise companies, and therefore face tougher challenges when selling cruise packages (Newfoundland Labrador, Dept. of Tourism, Culture and Recreation, 2007). In Ireland, Moloney and O'Sullivan (2004) reported 127 cruise ships called at Belfast, Cork, Derry, Dublin and Waterford in 2003. These ships carried 76,931 passengers and 39,264 crew members. The overall contributions of the cruise business to the island of Ireland for 2003 were purchases of €65.9 million worth of goods and services and sustainability of 484 full time equivalent jobs (Moloney and O'Sullivan, 2004).

The marine tourism sector is a major contributor to economies around the world, for example in Australia the estimated direct value impact of the Great Barrier Reef Marine Park is in excess of \$1AED billion (Wachenfeld 1998, GBRMPA 2000). About 1.6 million visitor days are spent on commercial marine-based activities in the Great Barrier Reef Marine Park (GBRMP) in Queensland each year (Zann, 1996). A further one million visitor nights are spent at Great Barrier Reef (GBR) island resorts, with more than nine million visitor nights on the reef and adjacent coast (Zann, 1996). In 1998, 742 tourism operations were permitted within the GBRMP, including 1674 individual craft (Wachenfeld, 1998). Total employment was estimated at 120,000 people (Zann, 1996).

Marine Leisure Boating is a major sub-sector of the marine tourism industry and includes boat sales, repair and building, marina operators, yacht charter and chandlery. According to BMF (British Marine Federation) statistics the British marine leisure boating industry grew by 8.5% in

2004, increasing its turnover to a total of £1.9 billion (€2.84bn). In six consecutive years of growth from 1999 to 2004, the revenue of the UK leisure boating industry increased by 57% (BMF, 2005). The industry employs 30,000 people and has also shown considerable strength in the export market, growing by 5.6% and bringing in £839 million (€1.26bn) to the UK economy (BMF, 2005).

Leisure boating involves craft of many sizes, from the sailing dinghy to the super yacht which are greater than 80 feet in length (Sime, Curthoys and Roy, 2009). According to the Financial Times (2005) there were 651 super yachts on order worldwide in 2005. Market leaders in 2005 for super yachts included Italy, the US, the Netherlands, the UK, Taiwan, Germany and New Zealand. The development of the sector in Taiwan is particularly interesting as the leisure boat building sector has been in decline. Increasing costs caused the leisure boat building sector to fall from \$200 million in 1987 to \$75 million in 1994 and 70% of the yards closed. The remaining players ventured into luxury yacht production and revenues grew to an estimated \$180 million (€144 million) in 2004.

Around the world marinas are playing a significant role in contributing to local and national economies. For example in the United States research has been undertaken by Mahoney, Stynes and Knight (2004) to estimate the economic impact of Great Lakes Marinas. The study was conducted to document the sales, employment, income and value-added impacts of Great Marina Lakes in the US. In 2004, there were almost 3.3 million registered recreational boats in the eight Great Lakes states. This comprises a third of all US recreational vessels and represents a 1.3 increase over the five-year period between 1999 and 2004 (Stynes and Knight, 2004). In 2004, Great Lakes marinas supported approximately 110 million days of boating by their seasonal renters (Stynes and Knight, 2004).

The economic impacts of Great Lakes marinas in the US are estimated separately for trip and craft-related spending. The \$664 million spent by the owners of registered boats kept at Great Lakes marinas has a direct economic impact of \$462 million in sales, almost \$172 million in personal incomes and about 7,500 jobs (Stynes and Knight, 2004). Adding the secondary effects, the total impacts to the Great Lakes regions is about 11,000 jobs and \$4.3 billion in personal income (Stynes and Knight, 2004). This data further demonstrates the socio and economic impacts of marine tourism discussed in Chapter 2.

3.4.2 International and EU Planning Issues and Obligations

In the EU Atlantic Area, authorities that have responsibility for land use planning as well as coastal and marine planning are not necessarily based within the same organisation. Other government bodies, agencies and even NGOs (non-government organisations) are usually also involved in the equation. For example, in Ireland alone there are a number of authorities with responsibility for marine industries or marine tourism that include:

- Government departments with tourism and natural resource management agendas include the Department of Arts, Sports and Tourism, the Department of Communication Energy and Natural Resources, the Department of Community Rural and Gaeltacht Affairs, the Department of Environment and the Department of Transport and Marine.
- The Marine Institute, who are responsible for research and marine industries development.
- Fáilte Ireland, who are responsible for marketing Ireland's tourism products.
- Local Authorities, County and City Councils, who employ County/City Tourism Officers that assist with coastal infrastructure and access planning and development.
- Non-Profit Organisations and Coastal Interest Groups funded through EU initiatives or local funding i.e. Coast Guard, Irish Water Safety (IWS).

At an international management level there are established international regulations and policies for the protection of the coastal and marine environment. For example the EU issued a fisheries policy in 2008, stating most stocks in the North-East Atlantic, including the North Sea continue to be overfished. This took account of the latest scientific advice on the state of fish stocks from the International Council for the Exploration of the Sea (ICES), advice from the Commission's own Scientific, Technical and Economic Committee on Fisheries (STECF) and input from stakeholders. This means that in order to build a healthy industry for the future, Ireland and European neighbours need to fish less in the short term. The Commission's policy is to rebuild fish stocks through long-term plans for the main fish stocks. For other stocks, a gradual approach is applied, changing quotas by 15% or less each year. Quotas and policies of this nature have an impact on commercial fishermen and their future survival. The Commission may be making a positive movement towards more ecologically sustainable fisheries, but this also presents challenges for the EU in re-deploying fishermen. One such possibility is the revival of the PESCA scheme discussed in Chapter 2 which would re-deploy fishermen into marine tourism related enterprises.

Marine related policies are implemented largely through the planning system, and are vital to maintaining the quality of the natural environment upon which marine tourism depends to attract tourists. They comprise international agreements/conventions and include World Conservation (IUCN) designations. At the world region level there are European regulations and

directives, including the 'Habitat Directive'⁷, Agenda 21 and Local Agenda 21 are United Nations agreed policies. In Chapter 17 of Agenda 21⁸ it is concerned with protection of the oceans, all kinds of seas, including enclosed and semi-closed seas, and coastal areas and with the protection, rational use and development of their living resources. Many statutory planning and regulation mechanisms have been incorporated into Integrated Coastal Zone Management (ICZM) measures. While ICZM is not a statutory obligation, many worldwide political initiatives have contributed to its political profile and status. Among these are the UN convention on the Law of the Sea, the World Commission on Environment and Development Report (1987), OECD Recommendations (1992), the Framework Convention on Climate Change (1992), the World Coast Conference (1993) and the Jakarta Mandate (1995).

In the European Union context, as a response to the European Council Resolutions adopted in 1992 and 1994, the European Commission issued a communication in 1995 on the integrated management of coastal zones. On the basis of this, the Commission on experimental Demonstration Programme in 1996, including co-funding mechanisms for ICZM pilot projects. This Programme for IZCM ran from 1997-99.

In 2004, the European Regional Development Fund co-financed 'A Good Practice Guide' – Planning for Marine Ecotourism in the EU Atlantic Area. The report is designed to allow planners to work within parameters of existing legislative and policy frameworks as discussed above. It allows planners in EU countries to overcome some of the more problematic aspects of such formal measures by bringing in a series of informal, supplementary measures.

All planning work for marine tourism must start with the identification of the area and coastal zones and of the factors, which influence the state of development of the sea/land space of the analysed region. Tubielewicz in 2006 at the Littoral conference in Gdansk in Poland identified in his paper '*Concept of Regional Plans*', historical and political factors which influence the state of development of the coastal region (see Table 3.10).

⁷ The Habitats Directive (together with the Birds Directive) forms the cornerstone of Europe's nature conservation policy. It is built around two pillars: the Natura 2000 network of protected sites and the strict system of species protection. The directive protects over 1.000 animals and plant species and over 200 so called "habitat types" (e.g. special types of forests, meadows, wetlands, etc.), which are of European importance.

⁸ UNCED (United Nations Conference on Environment and Development) (1992), Agenda 21, Rio de Janeiro Summit, New York: United Nations.

Table 3.10: Identification of Historical and Political Factors Influencing State of Development of the Sea/Land Space of a Coastal Region.

I. Historical Tradition
<ul style="list-style-type: none"> • International (political and economical) regional co-operation • Historical links between towns and regions • Common characteristics and differences in national cultures • Historical aspects of spatial development of coastal zones • Level of social and economical development of countries and sub-regions and its historical per-conditions • Historical aspects of international trade routes and transport corridors in the region • Level of education of the population and its economical and technical orientation
II. National Policies
<ul style="list-style-type: none"> • Social economic and strategic objectives of national policies and their relationships to the coastal regions and sea transport • Efficiency and effectiveness of functioning of national central administration and public institutions, which have influence on the development of coastal zones and sea transport • National transport policy and its relationship to coastal zones and public awareness of coastal and marine environmental problems • Role of territorial self-government in shaping the national and regional maritime policy and its local dimension • Level of entrepreneurship and competitiveness of national economies and its influence on the internationalisation of businesses and development of foreign trade.

Source: Tubielewicz, 2006.

In 2007, the EU Maritime Green Paper ‘*Towards a Future Maritime Policy for the Union*’ identified the need for an all-embracing maritime policy. It is aimed at developing a dynamic maritime economy and recognises the importance of the environment and of the principles of sustainable development advocated in the Gothenburg Agenda. Ireland submitted a position paper (to the EU Maritime Green Paper Inter-Departmental Steering Group), agreed by the cabinet following a public consultation process in May 2007 (www.maritimegreenpaper.ie, accessed June 2007). Ireland supports the EU Commission efforts to focus attention on the diverse policy areas that affect the maritime environment, and in particular the manner in which the Green Paper focuses attention on maritime transport, coastal regions, energy, the marine environment and social cohesion, but has robustly argued that that the Green Paper places insufficient importance on the sea fisheries, aquaculture and seafood processing sectors.

From an Irish perspective, the success of an integrated European maritime policy will ultimately be judged on the degree to which it facilitates greater trading activity, enterprise development and sustained economic growth by creating the requisite conditions for such activities, and

addresses environmental concerns and the development of coastal and island communities. The Irish Government notes that many of the themes raised in the 'Maritime Green Paper' are consistent with a number of current Irish policies and strategies related to research and development ('Sea Change: A Marine Knowledge, Research and Innovation Strategy for Ireland 2007 - 2013'); Fisheries, aquaculture and seafood ('Steering a New Course - Strategy for a Restructured, Sustainable and Profitable Seafood Industry 2007 - 2013'); Transport ('Transport 21'); Energy ('Delivering a Sustainable Energy Future for Ireland: The Energy Policy Framework 2007-2020'); and Tourism (Tourism Product Development Strategy 2007-2013). All of these government strategies are focused on economic development needs in the areas of seafood, transport and energy and take into account environmental protection needs. However, the government's tourism strategy does not provide for 'a leading agent' for marine tourism policies or clear direction for marine tourism product and business developments and this is further discussed in Chapter 4 and Chapter 7.

3.5 Chapter Summary

This Chapter provides an in depth understanding of marine tourism, its historical development, product structure, marine tourist characteristics, what motivates the water-based user to engage in activities, and finally an international picture on the performance of the sector and the range of EU obligations. In summary, marine tourism activities can be active or passive pursuits, which form part of a recreational activity associated with the natural water-based surroundings that can be in the water, land-based, or both. They may be formally organised or undertaken independently. They may form the basis of a specialist holiday or simply be an element of a conventional holiday.

Travelling to coastal areas for recreational purposes is not a new phenomenon and dates back to pre-biblical times (Alder, 1989). Through recent decades, significant advances in technology and the increase in international travel have made marine environments more accessible in both real and economic terms. There also appears to be a consensus in the literature on tourism that demand for opportunities to interact with nature, including marine environments, has been increasing rapidly (Smith and Jenner, 1995). In 2004, the world marine tourism market was estimated as €168 billion (Douglas Westwood, 2004). This figure is approximately 11% of total tourism revenues globally (€1,523 billion). Therefore, ocean and coastal tourism is widely regarded as one of the fastest growing areas of contemporary tourism (Pollard 1995; Kim and Kim 1996; Orams 1999).

The literature highlights the majority of recreation occurs close to people's place of residence, and this is also true of marine recreation. Choices in marine leisure and recreation experiences can range from easy to extreme, low to high impact, individual to team pursuits, casual to committed participation, modest to sophisticated equipment usage, and from relatively inexpensive to expensive set-up and participation costs (Jennings, 2007). Those engaging in

marine tourism include all age groups and both genders with a variety of motivations and interests. In contemporary times, the nature of participation in niche tourism, sport, leisure, and recreation is influenced by a number of factors, such as time, finances, family life cycle, and participants' perceptions of skills, risk, novelty, adventure and challenge (Jennings 2007).

No widespread agreement has emerged as to how the marine tourist market should be segmented for marketing and development purposes. Orams (1999) states in the literature that for a number of water-based activities a demographic pattern exists such as activities perceived as more 'adventurous' or having a higher risk of injury, such as surfing, sailing or scuba diving tend to be dominated by males and younger age groups. Where as marine leisure activities that are more 'passive' or social tend to be dominated by older age groups and in some cases by females.

In economic terms marine tourism activities can be classified as 'free pursuits' or 'paid pursuits'. Free marine tourism pursuits' are defined as water-based activities that are enjoyed at no cost to the user, usually on site at the location of the coastal or inland waterway area. However, there is an important economic value attributed to this type of tourist depending on their status whether they are local, domestic or international, they spend money in the area on food, drink, accommodation, petrol or other daily needs. On the other hand 'paid marine tourism pursuits' can be defined as water-based activities purchased from a marine tourism business operator per hour, day or by the week. With 'paid marine tourism pursuits' equipment and tuition is provided or a license to undertake the activity in the area.

The impacts of marine tourism are not just economic but also ecological, social and physical. As a result, one of the greatest challenges facing coastal managers is how to integrate tourism development within the range of coastal management, and therefore increase the likelihood of long-term sustainability of the coast as a whole (White 1997; Cicin-Sain and Knecht 1998). At an international management level there are established international regulations and policies for the protection of the coastal and marine environment. These policies are implemented largely through the planning system, and are vital to maintaining the quality of the natural environment upon which marine tourism depends to attract tourists. They comprise international agreements/conventions and include World Conservation (IUCN) designations. In Ireland, there is currently no clear line of authority that manages, invests, develops and markets the marine tourism sector. This is an issue for the long term sustainable development of this valuable tourism product.

CHAPTER 4 MARINE TOURISM IN IRELAND

4.1 Introduction

“And I rode by the plain’s of the sea’s edge, where all is barren and grey. Grey sand on the green of the grasses and over the dripping trees. Dripping and doubling landward, as though they would hasten away, like an army of old men longing for rest from the moan of the seas”. (WB Yeats, “The Wanderings of Oisín – Book I”)

In Irish culture, the marine and more especially *‘the sea’*, conveys mixed emotions. In part it symbolises failure, treachery and despair – the shipment of Irish leaders to the southern hemisphere; the export of national food stocks at the time of the Great Famine; the continual emigration of Irish people; the drowning of fishermen and coastal dwellers; and the national failure to exploit its fishing potential. On the other hand the sea has the power to capture a sense of imagination, adventure and achievement (Shields, O’Connor, O’Leary 2005).

Ireland’s water assets consist of 900,000 sq. km of marine resource (Irish Marine Federation, 2007) compared to 90,000 sq. km of land resource. The marine/water-based tourism and leisure sector has the potential to be one of Ireland’s major indigenous industries, which is based on key natural resources consisting of 4,000 miles of high quality coastal waters, 4,000 lakes, 75 major river catchments and over 450 miles of navigable inland waterways (Marine Institute, 2007).

In contrast to many coastal states in Europe, the extensive sea area over which Ireland holds sovereign rights and exercises jurisdiction is not perceived by the Irish public to be central to our national identity (Marine Institute, 2005). Article 77(4) of the UN Law of the Sea Convention vests Ireland with sovereign rights over the natural resources of the Continental Shelf these consist of the mineral and other non-living resources of the seabed and subsoil. These rights are exclusive in the sense that if Ireland does not explore the continental shelf or its natural resources, no one may undertake these activities without the express consent of the State. The marine resource is primarily in State ownership and the State has responsibility for its protection and enhancement (Marine Institute, 2005).

This Chapter examines the performance of the marine tourism sector in Ireland, the state agents, and the range of water-based products available to the domestic and international tourist. An integral part of this Chapter is an overview of the marine tourism sector from a national and regional perspective.

4.2 Marine Tourism in Ireland

4.2.1 Marine Tourism Performance

Ireland's ocean economy consists of a diverse set of companies with a combined annual turnover of more than €3 billion employing nearly 22,000 people directly and another 22,000 people indirectly (Marine Institute, 2006). Nearly two thirds of the total annual turnover of €3 billion is contributed by Marine Services companies – a sub sector dominated by shipping and maritime transport firms, but also including a significant contribution from firms involved in marine and water-based tourism and leisure (Shields, O'Connor, O'Leary, 2005).

Table 4.1: Marine Services Sector - Value Added and Employment (Commercial Marine Sectors, 2003)

	Turnover (€m)	Value-added i.e. Direct Contribution to GNP (€m)	Direct Employment (FTEs)	Direct & Indirect Contribution to GNP (€m)	Direct & Indirect Employment (FTEs)
MARINE SERVICES					
Shipping & Maritime Transport	1,275	216	6,047	601	12,496
Water - Based Tourism (Domestic)	434	240	3,173	264	5,085
Water-Based Tourism (Overseas)	132	66	2,098	134	3,104
International Cruise	66	37	0	40	484
Other Marine Services	121	51	779	102	3,435
SUBTOTAL MARINE SERVICES	2,028	610	12,097	1,141	24,604

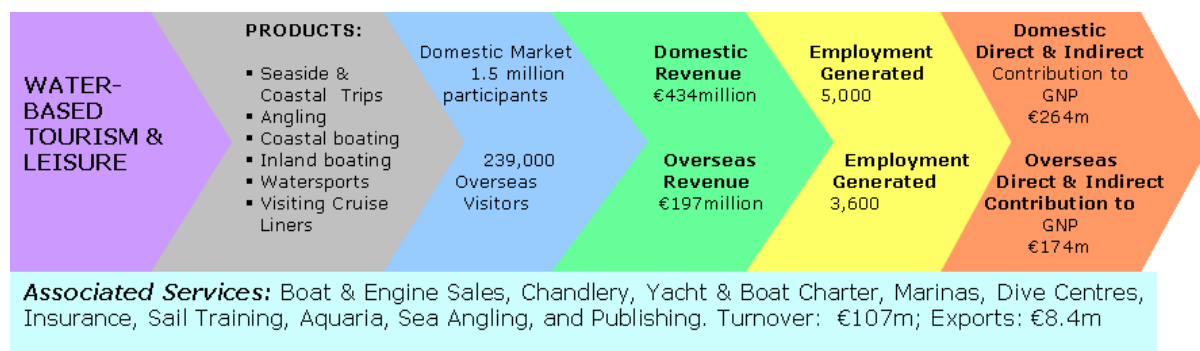
Source: Marine Institute and Peter Bacon & Associates 2006.

The majority of Ireland's trade is by sea, and approximately 80% of the population live in coastal counties (Marine Institute, 2006). Ireland's marine resource can be described as an under-developed resource, or an under-utilised national asset (Marine Institute, 2006). It contributes approximately 1% of Ireland's Gross National Product (GNP) – a much lower proportion than in most other maritime countries. For example, in the UK the marine sector is worth £69 billion each year in a wide range of sectors including all aspects of the leisure boating industry such as manufacturing, distribution, boat sales, hire and charter insurance, finance, moorings/berthings and marinas, boatyard services, retail and brokerage, inland and coastal activity operators. The ship/boat building and repair, and marine equipment manufacturers employ 56-57,000 direct employees and together they contribute more than £1.9bn to GDP. On the other hand, Ireland's ocean economy is a well kept secret – it is a wealth of opportunity, waiting to be discovered (Marine Institute, 2006).

According to the Marine Institute in Ireland the overall economic contribution of marine and water-based tourism was €630 million in 2003 (see Figure 4.1) and this figure supports 8,600

jobs (representing .4% of the labour force in Ireland). An ESRI (Economic Social Research Institute) study in 2003 found that Ireland’s marine and fresh water resources generates €434 million in expenditure by Irish residents and approximately 5,100 jobs are supported by this level of expenditure.

Figure 4.1: Ireland’s Water-Based Tourism & Leisure Market



Key Facts:

- 1.7m Participants.
- Revenue Generated : €631m.
- Direct & Indirect Employment : c. 8,600.
- Direct & Indirect Contribution to GNP : € 438m.

Source: Marine Institute, 2006.

A comparison of the domestic tourism market and the water-based domestic tourism market further highlights the value of this sector. In 2003, water-based tourism accounted for 22% of the domestic tourism market and generated 45% of domestic tourism revenue. The mainstay of the domestic tourism market recorded 2.5 million overnight trips which generated €229 million and 29 million day trips generated at €124 million in expenditure (ESRI, 2005).

Table 4.2: Ireland’s Domestic Tourism Market Water-Based Domestic Market 2003

	Participants (000’s)	% of Domestic Market	Revenue (€M)	% of Domestic Revenue	Employment (000’s)
Domestic Tourism Market	6,657		€970.9		22,300
Water-Based Domestic Market	1,475	22%	€433.6	45%	5,100

Source: ESRI, 2005.

A study undertaken by the Marine Institute in 2003 estimated values for sectors of the marine leisure industry in Ireland (see Table 4.3). One of the largest of these activities is boat sales, where seventeen companies generated annual sales of €41m and employed more than 130 people.

Table 4.3: Value Added and Employment in the Irish Commercial Marine Sectors (2003)

Activity / Region	Dublin € million	S & E € million	BMW € million	Total € million	Exports € million	Employees
Boat & Engine Sales	23.4	14.6	2.9	40.9	4.3	131
Chandlery	14.3	7.4	1.1	22.8	1.7	70
Yacht & Boat Charter	0	0.8	9.3	10.1	1.6	168
Marinas	5.3	3.1	2.4	10.8	0.5	83
Dive Centres	1.8	3.1	1.5	6.4	0	59
Insurance	3.1	2.0	1.5	6.6	0	25
Sail Training	1.6	2.1	0.9	4.6	0.2	156
Aquaria	0	1.7	1.0	2.7	0	32
Sea Angling	0.02	1.0	0.8	1.8	0	89
Publishing	0.3	0	0	0.3	0.05	4
Total	49.9	35.9	21.4	107.2	8.4	817

Source: Marine Institute, 2003.

4.2.2 Marine Tourism Policy and Development Agents

The Irish Marine Federation (IMF, 2007) has argued that Ireland is clearly a maritime nation, yet the Government seems to have turned its back on the potential that exists within its boundaries. The European Union is developing a policy on the marine environment which identifies and embraces each maritime sector and calls for a coordinated European marine development policy but the Irish Government is dismantling the marine brief and fragmenting the responsibilities across as many as six different Government departments and agents (IMF, 2007). The following section discusses the range of government agents with responsibility for some aspect of the marine sector. This fragmented management approach is not sustainable going forward.

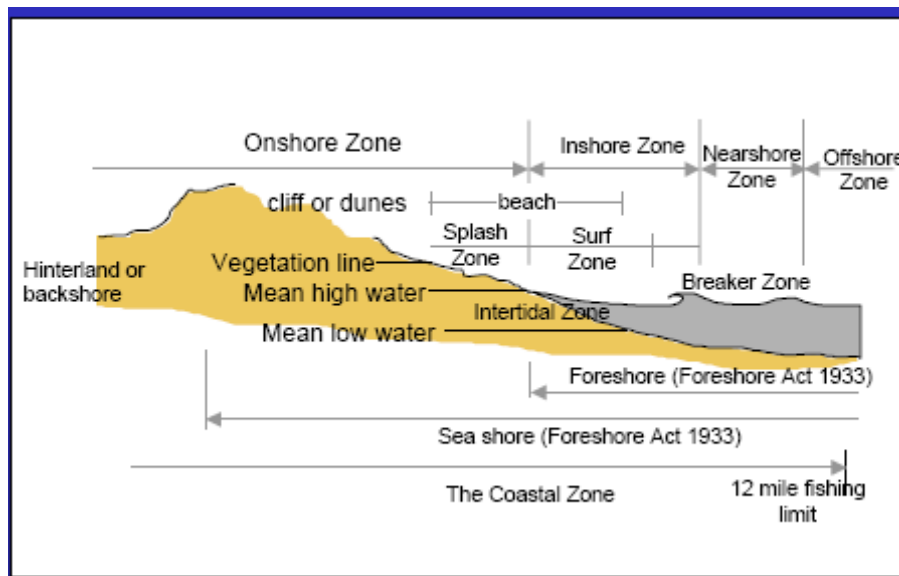
4.2.2.1 Department of Communication, Energy and Natural Resources

This government department was previously known as the Department of Communication, Marine and Natural Resources (DCMNR) and until 2005, was fully responsible for developing Irish marine policy. Its current responsibilities include telecommunications, broadcasting and energy sectors and it regulates, protects and develops the natural resources of Ireland.

Since 2005, the Department of Transport took over responsibility for maritime transportation and safety from the Department of Communication, Marine and Natural Resources (DCMNR). The Department of Arts, Sport and Tourism also plays an important role in marine leisure product development, grant aid and organisation development. Furthermore, responsibility for coastal zone management of the Foreshore Act (1933) now lies with the Department of the Environment. The 'foreshore' means the bed and shore, below the line of high water of ordinary or medium

tides, of the sea and of every tidal river and tidal estuary and of every channel, creek and bay of the sea or of any such river or estuary (see Figure 4.2 below 'Coastal Zone').

Figure 4.2: The Coastal Zone



Source: INTERREG IIIa funded project, CZMNet, 2004

The Foreshore Act (1933, see Appendix 8) makes provision for the granting of leases and licences in respect of foreshore belonging to the Irish State. The Act is in need of major review (IMF, 2007) as it is becoming a major obstacle in developing marine leisure enterprises on the coast, for example, the bureaucratic and timely procedures required in processing an application, cost and valuation of the leases are not reflective of the area (e.g. economically deprived) or long term benefits and developments of the proposed ventures are not being considered.

4.2.2.2 Research Government Agency: The Marine Institute

The Marine Institute was set up under the 1991 Marine Institute Act and it is the Irish National agency responsible for marine research, technology development and innovation (RTDI). Their remit includes assessing and realising the economic potential of Ireland's 220 million acre marine resource, promoting the sustainable development of the marine industry through strategic funding programmes and essential scientific services and safeguarding Ireland's marine environment through research and environmental monitoring.

The institute has developed a number of research and development programmes and has published a number of strategic documents. The key areas of research include market profiles, promotion and competitor analysis, and the sustainable development of the sector from an economic and an environmental perspective. This latter work includes the development of codes of practice. Of particular relevance to this thesis is the institute's: 'Development Strategy for Marine Leisure Infrastructure 1998 and 2007'. This has been used by the Institute as a blueprint for its research and development, piloting and demonstration work. Since June 2007, the Marine Institutes role in researching the development of marine leisure in Ireland ceased. In April 2008,

the Department of Community, Rural and Gaeltacht Affairs was given responsibility for Marine Leisure development in Ireland.

4.2.2.3 The Irish Marine Federation (IMF)

The Irish Marine Federation (IMF) is the National organisation representing both commercial and leisure sectors of the marine industry in Ireland. The IMF is affiliated to the Irish Business and Employers Confederation (IBEC). The primary aims of the IMF are to promote the interests of all sectors of the marine industry in Ireland and to encourage its growth and development; to represent the interests of the industry to Government, State Agencies and European institutions, thereby influencing public policies; to promote the image of the industry through quality awareness, public statements and the organisation of boat shows and to provide advice, information and services to members in order to assist in achieving these objectives.

4.2.2.4 Tourism Support Agencies

During the period 2000-2006 there have been a number of changes to tourism support agencies which affect water based tourism. These include;

- The establishment of Tourism Ireland as a new North/South body to market the island of Ireland internationally.
- The establishment of Fáilte Ireland with responsibility for the development of the tourism and hospitality industries in Ireland. This new body combines the functions of Bord Fáilte and CERT. Its establishment represents a significant step towards strengthening the support framework for the development of tourism in Ireland.
- The publication of 'New Horizons for Irish Tourism: An Agenda for Action' (2003). This was prepared for the Department of Arts, Sport and Tourism by the Tourism Policy Review Group. This report provides a medium term strategy and a framework of actions for the development of Irish tourism from 2003 to 2012.
- The establishment of the National Salmon Commission; and the development of a single Fisheries Board for Ireland to replace the Regional and Central Fisheries Boards.
- The development of a joint product marketing websites such as www.sailingireland.com, www.discoverireland.com

A document analysis of the strategic and product development plans relative to the marine tourism sector is presented in Chapter 8 and further discussion on the policy agents.

4.2.2.5 Tourism Funding Programmes

Over the past decade, the Irish water-based tourism sector has been influenced by a number of development programmes including the Tourism Product Development Scheme [TPDS] (1994-1999) and the National Development Plan [NDP] (2000-2006). Since 2000, there has been a considerable reduction in the level of NDP investment in water-based tourism and leisure products when compared with the preceding period. This is due to a number of factors, such as the lack of economic data on the current or potential value of marine tourism enterprises and resources, and a key lobby group or spokesperson to represent the sector.

Other funding programmes include the 'Operational Programme for Tourism 2000-2006'. By March 2005, it was estimated that grants totalling €5.4m had been approved for relevant water-based tourism and leisure projects under this specific programme.

During the 1990s, significant advances by the tourism industry were underpinned by investment in product development, access, transport infrastructure, marketing and training. It is estimated that close to €100m was invested in water-based tourism and leisure projects via the Operational Plan for Tourism (1994-1999) and other investment initiatives. Examples include an investment of €22 million in tourism angling facilities and a further €37m investment in special interest facilities, where approximately 46% of this investment supported marine or water-based projects. Examples of such projects include the Malahide Marina discussed in Chapter 2, the expansion of the inland cruiser fleet and the provision of a network of visitor mooring facilities. Some €6m was invested in the PESCA Programme discussed in Chapter 2 and 3, which aimed to provide an alternative means of income for fishing communities through grant aid for sea angling and tour boats. Finally €25m investment in tourism enterprises came from the Business Expansion Scheme (BES).

4.2.3 Marine Tourism Locations

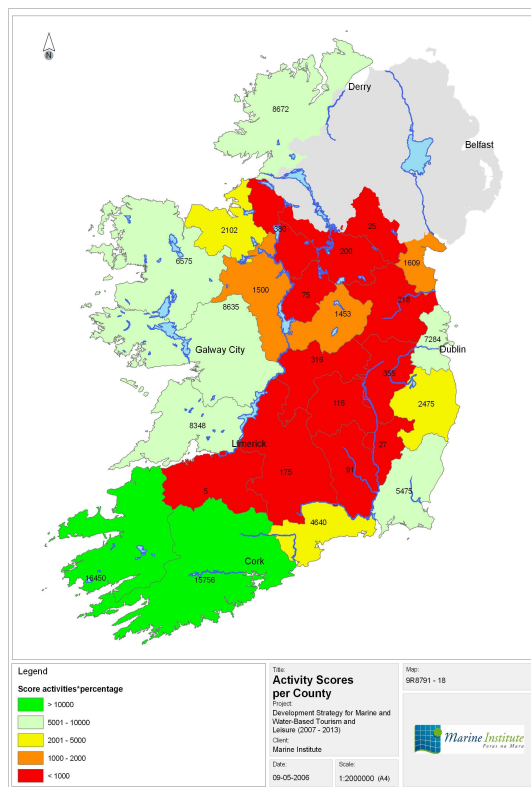
In Ireland the marine tourism sector includes a wide variety of different pursuits that can be classified as both active and passive as outlined in Chapter Three. The number of different activities involved includes general boating, sailing, cabin cruising, angling, watersports, pleasure cruising, nature tourism and marine related visitor attractions.

The demand for marine recreation in Ireland comes from four main markets namely;

1. The local resident market i.e. those living in the surrounding area of a beach/port/harbour.
2. Domestic day trip visitors, i.e. people who do not live locally, but who might use the services of a beach/port/harbour. These people usually live within 60-90 minutes drive from the coast.
3. Domestic overnight visitors, i.e. Irish people who spend an overnight visit in the coastal area probably for holiday reasons.
4. Overseas visitors, i.e. mainly visitors from Britain and Continental Europe.

As map 1 illustrates there is a heavy concentration of water based tourism and leisure activity away from the east coast of Ireland.

Map 1: Marine Tourism Product Locations in Ireland



Strength of Marine & Water Based Activities (activity by county)

Strength of Marine/Coastal Product based on Aggregated Scores

- Strongest product base in Counties Kerry and Cork
- Followed by Donegal, Galway, Clare, Dublin, Mayo, Wexford,
- Waterford, Sligo, Wicklow, Louth more limited potential

Strength of Inland Water Product

- Westmeath & Roscommon strong
- Less developed throughout the rest of the midlands
- Comparative advantage is in marine

Source: Marine Institute, May 2006

Note: See Appendix 10 for a larger version of Map 1.

Map 1 represents the key marine tourism locations in Ireland. Larger versions of maps 1-12 are provided in Appendix 10. The maps were produced by Royal Haskoning for the Marine Institute in 2006 and are based on a 'Dutch Spatial Planning Approach'. Each map highlights the marine tourism and leisure opportunities in Ireland. Through this approach each map was generated by:

- Examination of the key marine and water-based activities that existed in Ireland
- Examination of where the activities were located
- Followed by mapping and scoring them through a quantitative and qualitative audit
- Followed by mapping and scoring external factors (i.e. accommodation indicating services in the area such as shops and restaurants and infrastructure such as ferries, airports and railways)
- Taking into account tourism services and access (that affect visitor decisions)
- And finally applying a factor in weighting to each activity location. Table 4.4 highlights the data output from this mapping technique – 'Actual Weighting Table'
- The end result = output maps = opportunities / gaps in the marine tourism product in Ireland.

The objective of the mapping exercise was to identify product development opportunities and gaps and as such areas which have the potential to attract MWTL (Marine and Water-based Tourism and Leisure sector) visitors. The potential of attracting MWTL visitors is a function of

capacity and quality, i.e. Potential = $F(\text{capacity} \ \& \ \text{quality})$. In map 1 counties Kerry and Cork score high followed by Galway, Donegal, Mayo and Clare on the West coast of Ireland.

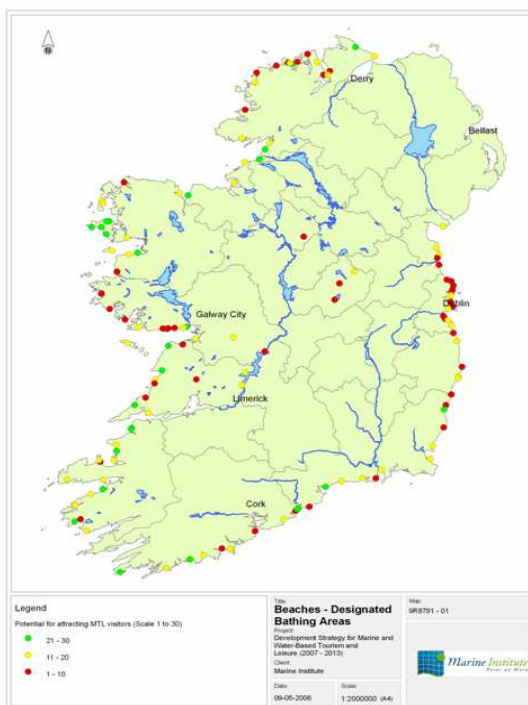
Table 4.4: Actual Weighting Table (combine → interrelationship)

ACTIVITY	Weight	Current / Projected Trends in Use and Market				Accommodation	Main Roads	Airports	Railways	Car Ferries
		Extensive	Intensive	Domestic	International	20	15	9	1	5
Beaches	11%	2	8	9	1	32	24	1.8	1.6	1
Diving	5%	6	4	7	3	16	12	2.7	0.8	3
Marinas	1%	7	3	8	2	12	9	1.8	0.6	2
Sailing, Boating and Water Sports Centres	5%	4	6	7	3	24	18	2.7	1.2	3
Sea Angling Charters	1%	5	5	5	5	20	15	4.5	1	5
Inland Angling	5%	4	6	5	5	24	18	4.5	1.2	5
Coastal and Waterway Walks	1%	6	4	5	5	16	12	4.5	0.8	5
Whale and Dolphin Watching	1%	8	2	8	2	8	6	1.8	0.4	2
Navigable Inland Waterways	5%	6	4	2	8	16	12	7.2	0.8	8
Small Tourism Vessels	11%	4	6	7	3	24	18	2.7	1.2	3
Water Theme Visitor Centres	53%	2	8	7	3	32	24	2.7	1.6	3

Source: Marine Institute, 2006 (developed by Royal Haskoning)

Map 2: Beaches – Designated Bathing Areas

Map 3: Diving Centres



Note: A larger version of all maps 1-12 are available in Appendix 10.

To further illustrate the ‘Dutch Spatial Planning Approach’, Table 4.5 explains the scoring mechanism used for ‘Map 2: Beaches - Designated Bathing Areas’.

Table 4.5: Scoring Mechanism for Beaches – Designated Bathing Areas

Beaches	Concerns EPA designated beaches
Capacity and Quality Indicators	The potential for attracting MWTL visitors is expressed as followed; <ul style="list-style-type: none"> • Designated (score = 5) • Blue Flag Status (score = 15) • Suitable for surfing (score = 5) • Resort beach (score = 10)
Remarks/ Example(s)	- It should be noted that a blue flag beach automatically will also be a designated beach. As a Blue Flag status automatically constitutes designation, the score for the combination is 15. - Example: If the (designated beach is a blue flag beach in a resort, score = 15+10=25 - Example: If the (designated) beach is suitable for surfing, score = 5+5=10
Map Information Sources:	<ul style="list-style-type: none"> • Designated Bathing Areas: Environmental Protection Authority (EPA) • Blue Flag: An Taisce National Blue Flag Coordinator • Designated Seaside Resorts: Dept. of Finance/Renewal Scheme for Traditional Seaside Resorts. • Surfing Beaches: Irish Surfing Association + Regional Tourism Websites

The Blue Flag is an exclusive eco-label awarded in 2006 to over 3200 beaches and marinas in 36 countries across Europe, South Africa, Morocco, New Zealand, Canada and the Caribbean. The Blue Flag Programme is owned and run by the independent non-profit organisation Foundation for Environmental Education (FEE). For example on Map 2, Gurteen and Dogs Bay beaches in Roundstone in the West of Ireland score 20, and Salthill in Galway scores 35 on the potential to attract MWTL visitors. The beaches in Roundstone are adjacent to approximately fifteen seaside businesses including i.e. shops, restaurants, hotels etc. It is a magnet for day-trippers, residents and holiday makers. Chapter 7 includes a case study on the performance of this seaside business community.

The literature review on beaches, highlighted an interesting study conducted by Tunstall and Penning-Rowse (1998), titled ‘The English Beach’. Their study focused on fifteen beaches in England over a decade where they examined preferences towards beaches and protection methods to consider the values attached to beaches. A model of beach users’ attitudes and values was developed to explain the factors which contribute to the values attached to beaches. They found that beach visits not only are experienced differently but also have different meanings. For example the day visitor’s trip to the beach is a special event. For residents, the beach is a local leisure resource, a regular and routine element of their daily life’s. For holiday makers, it is a special experience, but one often repeated with tourists who return to the same location year on year. Tunstall and Penning-Rowse (1998), also found that the main factors motivating beach visits to popular recreational sites were the cleanliness of the site, type of beach material available, the natural setting and familiarity with the site.

Map 4 in the Appendix 10 illustrates the visitor marina sites in Ireland. The visitor marina network in Ireland is incomplete, particularly along the West and North-West coastline. According to a Fáilte Ireland report in 2006, there are no clear policies around planning and foreshore issues for marine tourism. The 2000 National Development Plan put forward the idea of creating a 'necklace of marinas', however, before any real investment can take place, there is a need to reform the planning process with particular reference to the Foreshore Act (1933) (see Appendix 8 for a copy of the Foreshore Act 1933). Without the necessary reform of this Act and the associated valuations process that accompanies it, marina developments will be slow and eventually economically unviable due to the high levels of the valuations given in return for foreshore leases and licenses.

As discussed in Chapter Two, in 2007, the Irish Sea Marine Sector (ISMS) Development Programme funded by INTERREG conducted research along the East and South East Coast of Ireland to investigate the economic impact of marinas on the local economy. Three marinas were selected by the ISMS in order to provide an illustration of the impacts of marinas on their surrounding areas and on the economy as a whole. Each marina is different in origin and management and includes;

- 1) Malahide Marina, the longest established of the marinas, owned and managed by the private sector, within the Malahide Estuary.
- 2) Dún Laoghaire Marina established by the private sector within the harbour at Dún Laoghaire.
- 3) Kilmore Quay Marina - owned and operated by Wexford County Council within a fishing harbour.

The overall study found that expenditure by marina berth holders in the ISMS survey region contributes an economic benefit to the region of €20.78 million. This is estimated using average figures derived from the ISMS marina case studies (ISMS, 2007). The audit identified that there are currently a total of 1,508 berths in marinas in the study area. Based on the average annual berth holder expenditure derived from the surveys (€9,843) an estimate of berth holder expenditure of €14.84 million can be made for the region as a whole. Using a multiplier of 1.4 (i.e. this is the tourism income multiplier for the region) the total economic benefit from berth holder expenditure within the ISMS region is estimated at €20.78 million. These figures further demonstrate the economic impact from investing in marine tourism infrastructure such as marinas and the long term benefits that are derived from the local town, city or communities.

4.2.4 Marine Tourism Participation Levels

Statistics on the use of water-based activities by overseas tourists are limited and difficult to obtain, especially for activities such as wind and wave surfing, water skiing, canoeing, and scuba diving. An example of one data report dates back to 1996 when Bord Fáilte, now Fáilte Ireland, and the Irish Boat Rental Association estimated that 240,000 overseas visitors spent £89 million on water-based and leisure activities. About 160,000 of these visitors were specialist water-

based tourism and leisure participants, spending £58 million. While water based tourism is growing in popularity for example in the domestic market, over half the adult population engaged in at least one water-based activity in 2003 (ESRI, 2003). However, the overseas market remains unquantified, but there are concerns of a decline in some activities such as Angling due to licensing, accessibility and stock issues (Regional Fisheries Board, 2006).

In 1996 and 2003, the ESRI conducted a study on behalf of the Marine Institute which captured the performance of the marine tourism sector from a national perspective under key water-based activity groups. The changes in marine leisure activity participation from 1996 to 2003 in Ireland are outlined in Table 4.6 below.

Table 4.6: Number and percentage of persons participating in each marine leisure activity 1996 versus 2003 - Trends.

Activity	1996 Total participants (000s)	2003 Total participants (000s)	Trend
Angling			
Freshwater angling for coarse fish	66.2	66.5	Slight increase
Freshwater angling for game fish	76.4	80.5	Slight increase
Sea angling from the shore	53.6	74.1	Increase
Sea angling from a boat	34.3	53.0	Increase
Any type of angling	190.0	218.0	
Coastal and Inland Boating			
Sailing at sea	49.9	58.8	Increase
Boating and sea in row boats, canoes etc	*	32.1	
Boating at sea in power boats etc	*	24.6	
Cruising or boating on inland waterways	30.1	42.8	Increase
Any type of boating /sailing	143.9	142.8	
Watersports			
Water skiing, jet skiing	*	19.2	
Surfing, sail boarding	*	17.8	
Scuba diving, Snorkelling	*	9.1	
Other Sea Sports	*	7.3	
Seaside and Resort Trips			
Swimming in the sea	538.8	353.5	Decrease
Whale and dolphin watching	15.9	9.6	Decrease
Bird watching in coastal area	31.2	12.4	Decrease
Visiting nature reserves etc in coastal areas	84.6	43.5	Decrease
Other trips to the beach or seaside	1047.8	1134.6	Increase
Other trips to the islands	*	33.2	
All water-based leisure activities	1,468.2	1,475.8	Slight increase
All adults in the population	2,634.0	3,013.6	Increase
Percentage of adults in population undertaking any kind of water based leisure activity	56%	49%	Decrease

Source: ESRI/Marine Institute – A National Survey of Water-based Leisure Activities 1996 and 2003. Note: * comparable figures not available in the 1996 survey.

The 2003 ESRI study findings discussed throughout this Chapter were administered as a module to the ESRI's on-going monthly Consumer Sentiment Survey which is conducted on behalf of the European Commission – DG-ECFIN. This core questionnaire records details on respondent's perceptions of and attitudes to trends in the national economy. The ESRI has used this survey over the last 25 years to carry dedicated modules which address specific issues, such as 'marine leisure activities'. The marine leisure survey was conducted in the months of April to July inclusive of 2003.

The sample for the survey each month is an independent random sample of persons selected in two stages. First, a total of 50 sampling points are selected nationally each month from the Electoral Register. Each of these sampling points is taken as the first stage in the sample selection process. Within each sampling point or cluster 100 telephone numbers are generated at random. The interviewer completes 25 questionnaires in each cluster or sampling point. The respondent within each household is selected by the interviewer on the basis of a set of controls based on age, sex and employment status of members of the household aged 16 years or over.

This results in a random sample each month of approximately 1200 persons and the total sample was made up of 4,400 questionnaires with the margin of error or so-called "confidence interval" resulting in +/-2.22 percentage points. In line with all sample surveys 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.

In interpreting the 2003 ESRI results presented in this Chapter 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 a coarse angler, a boater in lakes and in the sea, a scuba-diver and so on. Hence the numbers involved in, for example, all types of fishing is lower than the sum of the numbers involved in each of the individual different forms of angling.

In Table 4.6, where comparable figures exist between the 1996 and the 2003 survey, one can see that although the recorded participation levels of smaller sports such as water skiing/jet skiing; bird watching in coastal areas is reduced somewhat as compared to levels in 1996 the reduction in absolute percentage point terms is not very substantial. The exception to this general observation is 'Swimming in the Sea'. There is a quite substantial fall in participation rates in this activity from 20.4 per cent in 1996 to 11.7 per cent in 2003⁹ - almost 9 percentage points. This represents a substantial change in behaviour patterns over the period in question. One can, of course, only speculate as to the reason for such a dramatic reduction in the levels in question. Some of this reduction may be attributable, at least in part, to the substantial number of indoor swimming pools which were opened over the period, as well as increasing awareness of and concern with fears of water pollution.

The survey results outlined in Table 4.6 show that in 2003, 49% of the adult population (1.48 million) participated in some form of water-based activity during the survey period. Although overall satisfaction with the facilities was high, a further 10% of the adult population (294,100)

⁹ 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.

stated that they would take up some marine leisure activity if facilities were better. This demonstrates the potential and scope for development in the sector.

The ESRI study found that participation is strongly related to highest level of education completed. This was especially so in respect of persons aged 30 years or more. Participation was lowest among farmers (28%) and skilled and unskilled manual workers (45% and 41% respectively) rising to a maximum for the professional/managerial group (67%). Interestingly, the impact of having children (aged less than 18 years) in the household was seen to be a strong determinant of propensity to participate in marine-based activity. This is especially so in respect of non-specialised participation in areas such as 'swimming in the sea' and 'trips to the beach'.

There is evidence from the survey findings 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. 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. A performance summary of key marine tourism activities is outlined in part 1 to 6 below.

1) Angling:

In 2003, over 218,000 domestic visitors undertook 3 million day trips and 112,000 overnight trips involving angling. This activity generated €59 million in domestic tourism revenue and supported 733 jobs (ESRI, 2003). The highest revenue generating angling activity is freshwater game angling and the greatest proportion of expenditure on angling activity is equipment.

The most significant fact to emerge from the ESRI 2003 survey is that engaging in angling seems to be a declining activity (190,000 people in 1996). This is particularly evident for angling on fresh water lakes and rivers. Licensing issues and a drop in stock levels are playing a big part in cause of the decline in the West of Ireland (Ginty, 2005). However, sea angling and shore angling are on the increase. The issue of pollution featured strongly among coarse anglers and poor fish stock was mentioned by 15% of the game and seashore anglers (ESRI, 2003). A significant 39,000 of the ESRI 2003 survey respondents said they would take up angling if relevant facilities were improved.

According to a Fáilte Ireland Product Development Report in 2006, Ireland was attracting 103,000 overseas anglers compared to 173,000 in 1999. This decline has been caused by a combination of factors, many of which were outside the control of the industry including changing angling trends in the UK, increased competition from Europe with more competitive packages and reduced restrictions on 'catch' and designated fishing areas. In the West of Ireland, reduced water quality such as the cryptosporidium outbreak in 2007 led to an impact on visitor numbers in Galway City during peak season (Irish Hotels Federation, 2007). In addition the

inadequate and poorly targeted marketing investment and a lack of co-ordination and poor information provision of marine leisure activities as a whole.

However, expenditure by overseas anglers in Ireland is estimated at €66 million, with the average spend per angler well above that of general visitors (Fáilte Ireland, 2007). The Fáilte Ireland vision for success for Irish angling tourism by 2009 sees:

- An improved quality and quantity of fishing in the country with improved stock levels.
- Fishing locations within Ireland easy to access for visitors with information readily available.
- The supply side of angling tourism operating efficiently and commercially, exceeding consumer expectations and developing and leveraging synergies across sectors.
- Relevant agencies working in a co-ordinated manner to target and develop the angling sector.
- Ireland established and recognised as a premium destination for angling tourists.
- The fishing environment is supportive of visiting anglers, with issues such as drift netting and the location of fish farms resolved.

According to Fáilte Ireland and the Central Fisheries Board, in 2007, an extra €3 million in incremental funding has been sought to better market Irish angling tourism and achieve the vision outlined above.

2) Seaside/Resort Trips:

The activity most frequently recorded (see Table 4.6) is the relatively generic 'other trips to the beach or seaside'. An estimated total of almost 38 per cent (1.1 million adults) recorded having participated in this type of activity in the 12 months preceding the ESRI survey. The next most commonly recurring marine leisure activity is 'Swimming in the sea' – recorded by just under 12 per cent of adults (just over 353,000 persons). These activities generated €278 million in domestic tourism revenue, supporting the equivalent of 3,200 jobs in coastal communities.

Almost a third of beach visitors and 19% of swimmers from the 2003 ESRI survey, expressed environmental concerns about pollution and 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.

According to a Fáilte Ireland Report in 2006, new and innovative approaches to beach management in major coastal counties are encouraged. Any Blue Flag beach which is identified as a tourism priority may be eligible for funding for management, which may include elements such as dune and other sensitive area protection, access walkways, beachside clubhouse facilities for management plan compatible activities such as surfing and in certain circumstances, car parking.

3) Coastal and Inland Boating:

In 2003, Domestic spends on boating at sea and on inland waterways generated almost €50 million, supporting the equivalent of 661 jobs. An estimated 142,000 adults engaged in some form of boating activity ranging from sailing/boating at sea to cruising on inland waterways. Boating activity accounted for almost 1.5 million day trips and 148,500 overnight trips during 2003. 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 €25.7 million.

Over 60% (30,000) of those who sail at sea claim to own their own boat. This compares to 38% (14,000) ownership amongst those who go sailing/boating on inland waterways. Poor access and lack of marina and associate facilities was expressed as a key issue among boating enthusiasts who use small craft such as row boats and canoes (ESRI 2003 and Ginty 2005).

Since 2000, the Irish inland cruising market has declined by 20%, whilst tourism numbers have increased by 9% for the same period. Key international markets for inland cruising are France, Britain, Germany, USA and the Netherlands.

4) Water Sports:

For the purpose of the 2003 ESRI study, water sports activity was categorised into four groups namely: Water Skiing/Jet Skiing; Surfing/Sail Boarding; Scuba Diving/Snorkelling; and 'Other Sea Sports. Water sport 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% of the total number of overnights attributable to water sports activity were accounted for by those involved in both surfing/sail boarding and scuba diving/snorkelling.

A key concern expressed by 70% of surfers and 45% of water/jet skiers was a lack of facilities such as showers, changing rooms, parking, storage areas, beach clubs etc. Over 89,000 of adults expressed an interest in taking up some form of watersport activity if facilities improved.

5) Sailing

A Franklin Market Research Report for Failte Ireland (2006) found that from 2000 to 2005, the numbers of sailors visiting Ireland declined, with 9,000 sailors visiting Ireland in 2005. A study of visiting sailors at 12 Irish marinas¹⁰ was undertaken on behalf of Fáilte Ireland from June – September 2006. The findings highlight the following;

- The average length of a sailing trip is 30 days.
- The average time spent sailing in Ireland was 15 days.
- 82% of those interviewed did not visit an Irish sailing website (either www.sailing.ie or www.sailingireland.com).

¹⁰ Howth, Salve Marina (Crosshaven), Dún Laoghaire, Kinsale YC, Arklow, Lawrence Cove (Bear Island, County Cork), Kilmore Quay, Cahersiveen, Crosshaven Boatyard, Dingle, Royal Cock YC (Crosshaven) and Kilrush.

- Overseas visitors spent €136 per boat per day while Irish visitors spent €367 per boat per day.
- The top five factors considered by visiting sailors were;
 - The availability of good sailing grounds.
 - The availability of weather reports.
 - The availability of facilities such as shops, restaurants and pubs.
 - The quality of the scenery and
 - The availability of moorings and berths.
- The disadvantages most mentioned by visiting sailors were;
 - Weather (47%).
 - Facilities (37%).
 - Cost (22%) and
 - Distance between safe moorings (9%).
- Capacity was seen as the biggest issue facing the Irish marine sector.
- Only 56% of those surveyed were happy with the facilities on offer.

In addition a report published by Fáilte Ireland in 2006 found that the visitor marina network in Ireland is incomplete, particularly along the West and North-West coastline and there are no clear policies around planning and foreshore issues for marine tourism. The lack of marinas and a national network make it difficult for the domestic market to engage in marine leisure boating activities or buy boats. In addition, overseas sailing visitors are not encouraged to visit Ireland, especially the West region due to the lack of facilities.

6) Nature Related Coastal Activities:

Nature related coastal activities are 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 ESRI 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 due to a lack of operators, designated viewing areas and directional signage (Ginty, 2007).

An interesting example where sustainable whale watching has been developed in Ireland can be found in the Shannon Estuary, in Co. Clare. A study commissioned in 1997 to examine the potential of special interest marine tourism in the West Clare peninsula identified the dolphins as the areas unique product which could be the basis for an image that is special to West Clare (Marine Institute, 1999). Following this a local tourism development group developed a plan for the area and investment was made in new boating vessels to drive visitor numbers to the area to engage in nature related coastal activities. Between 1995 and 1997 about 200 trips were carried out annually involving around 2,500 people. This was estimated to be worth between €108,000-241,000 to the local economy (Berrow and Holmes 1999). During 1999 there was a 30% increase in the number of trips and during the 2000 season visitor numbers increased by 300% to about

12,000 people. In 2003 numbers were around 15,000 per annum. This research study further demonstrates the potential value of investing in natural water-based marine tourism assets such as beaches, coastal bird watching, mammal watching or coastal/beach boardwalks. Lessons can be drawn from the Shannon Estuary project to encourage the development and investment of the marine tourism sector in the West Region of Ireland

Other initiatives in Ireland relating to nature related coastal activities include the development of a nationwide network of looped walks, which commenced in 2006. This involves clearly signposted accessible off public road pathways with stiles and footbridges as required over lengths of 5 to 12 kilometres. A Fáilte Ireland review has identified the priority themes for these walks to be Mountain, Nature, Coastal, Island and Heritage. Under the National Development Plan (NDP) [2007 – 2013] it is a long term objective to generate a coastal walkway around the entire coastline of Ireland. Relevant local authorities along the coastal zone are being provided with details on how this can be progressed and funded in their own coastal sections.

4.3 Marine Tourism in the West of Ireland

4.3.1 Marine Tourism Products and Market Demand

The West of Ireland's clean beaches, scenic walks and spectacular inland waterways and rivers are suitable for a variety of water based tourism and leisure activities, both active and passive. A proportion of the western region has designated nature reserves such as the Connemara National Park (2,699 ha). The coastline in Counties Galway and Mayo in particular are highly indented with many peninsulas and small islands. The vast majority of these resources are perceived by visitors as unspoilt and unpolluted. However, it is also under-developed from a tourism perspective.

Map 13:

Ireland West Region



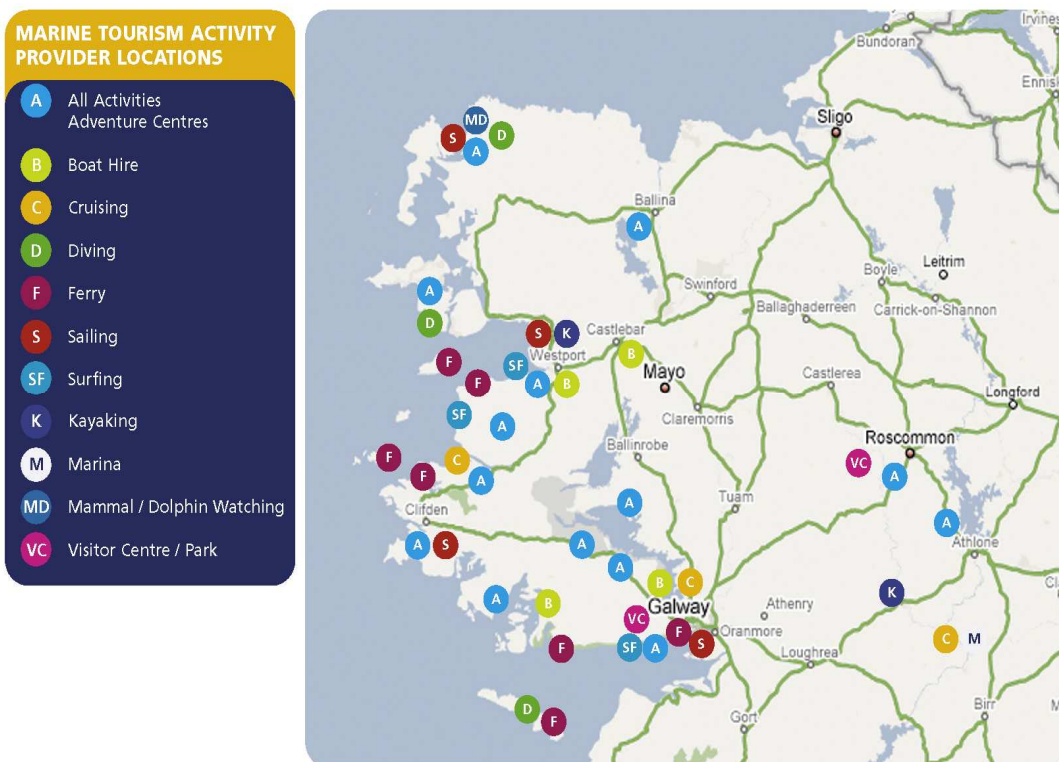
Source: www.irelandwest.ie (accessed July, 2006)

A study conducted by the Marine Institute (2002) identified Galway City and County as having significant potential to develop water-based tourism utilising its current resources. However, it is

not Galway city and county alone that has significant potential, but Ireland West (as a region) has a wealth of marine resources with considerable potential for development and marketing. These resources include Galway Bay, the River Corrib, Galway Docks, Salthill, the Aran Islands, Achill, the unspoilt shoreline around Mayo, Clew Bay, Killary harbour, the Gaeltacht Coastline and great fishing lakes, Kinvara, Portumna, Loughrea, Ballinasloe, River Clare and many more. The same study also highlighted that water-based activity tourism is largely underdeveloped in the West and still in its infancy. This is due to a lack of investment in water-based activity facilities and an understanding of the regions' marine tourism sector economic potential.

Part 1 to 5 below discusses the marine tourism products that are available to visitors touring the West of Ireland. Map 14 highlights the locations of the marine tourism activities in the West of Ireland (*Note: this Map derived from secondary and primary research findings*).

Map 14



Source: Ginty, 2008

1) Angling

The West Region has some of the best fishing in Ireland including Lough Corrib, Mask and Carra, which are the three greatest wild brown trout fisheries in Western Europe and are Ireland's most important angling asset (Regional Fisheries Board 2007). In the West there are currently 19 'angler' marine tourism operators including; 12 'Game' rod license distributors including 2 who offer Pike and Coarse, 6 sea angling distributors and 1 pike, game and coarse operator (Ginty, 2007).

Until recent years there were twelve internationally important wild brown fisheries in Ireland unfortunately several of these lakes are now seriously degraded (i.e. due to a fall in fish stocks and water pollution) making the three western lakes of even greater importance (Regional Fisheries Board, 2007). In an effort to protect the wild brown trout resources of Loughs Corrib, Mask and Carra from excessive exploitation the Western Regional Fisheries Board in association with the Lough Corrib Angling Federation, the Carra Mask Angling Federation, the Lough Corrib Trout Angling Federation and the Western Fisheries Development Society have recommended that anglers exercise a degree of moderation as part of the overall conservation effort on these lakes.

Visiting Anglers to the region fish mainly in Lough Corrib, Mask, Carra and Conn each year. The rejuvenated Lough Ree in Co. Roscommon has large hatches of mayfly and attracts dedicated anglers. Further east in Co. Roscommon lie some of Ireland's finest mixed fisheries; game, coarse and pike. The River Suck has a large number of tributaries such as the Hind, holding stocks of wild brown trout. The River Moy, connected to Lough Conn and flowing to the sea at Ballina has an annual salmon rod catch averaging 7,000 fish, with some up to 20lbs (Regional Fisheries Board, 2007).

In Galway, sea shore fishing for mackerel (from rock, pier or beach) in August and September has become a popular past-time with local and visiting teenagers and adults. For sea angling, the season for sea trout does not commence until June 1st. All sea trout caught in the Western Fisheries Region during the angling season must be returned alive to the Water. It is illegal to kill sea trout, to have in possession or control dead sea trout, or to sell or offer for sale sea trout (Regional Fisheries Board, 2007).

There is an angling bag limit of 10 salmon (any size) or sea trout (over 40 cm) on certain rivers. The bag limits are subject to any quota allocated to a river and its tributaries on rivers where salmon can be caught and retained for example Corrib, Cashla, Screebe, Ballynahinch, Moy and Easkey (further information is available in Appendix 7 and at <http://www.fishinginireland.info/salmon/salmontagging.htm#tab1>, accessed February 26th 2010). The quota for the entire Corrib system including Galway weir, Lough Corrib, and the Cong River was 375 salmon for the season (McNamara, Connacht Tribune, June 29th, 2007). Although this was increased to 788 from May 13th 2007 after additional data was obtained from previous catches. Up until 2002, anglers were known to land 18 salmon in a day at the Galway Weir.

After the daily bag limit has been taken, anglers are permitted to fish catch and release, using single, barbless hooks and there is a ban on the use of worms. However, a problem exists as the above regulations discussed are not policed and communication on these issues among operators, fisheries boards and the public is poor. In comparison, the UK angling industry, which generates £538 million a year, has a policing system for freshwater lakes which includes proper signage and wardens to monitor angling activity. In April, 2008 the UK Government announced plans to introduce a foreshore license to better manage fish stocks and they plan to invest the

license funds into further policing and infrastructure development to support visitor and local access along the 2,500 miles of coastline (Institute of Fisheries Management, UK accessed www.ifm.org.uk/links/ May, 2008).

On rivers in (Clarinbridge, Knock, Aille, Owenboliska, Spiddal, Dunkellin, Stream, Lough Nafurnace, Brusna, Leaffony, Ballinglen, Cloonaghmore and Palmerstown) angling for salmon (any size) and sea trout (over 40cm) is prohibited. Anglers obtain their licence from the Regional Fisheries Board headquarters or any rod licence distributor. Angling laws and angler obligations in the West of Ireland are further outlined in Appendix 7.

The restrictions and new conservation measures to protect stocks have led to a serious downturn in angling visitors (Regional Fisheries Board, 2007). Other barriers including poor access to the water, limited boat hire, no maps, limited fishing supply shops and the dislike of tourists by local fisherman have also had a major impact on the decline in visitors (Ginty, 2007). The latest figures available show the overseas angling industry was worth €13 million in 2005 to the West of Ireland region (Fáilte Ireland 2006). An estimated 20,000 overseas anglers arrived in the west in 2005, accounting for a third of all visitors who travelled to Ireland for the sport.

Other threats to the West's angling tourism product include Zebra Mussels (i.e. is a species of small freshwater mussel, an aquatic bivalve mollusc, originally native to the lakes of southeast Russia, which been accidentally introduced in many other areas, and has become a problematic invasive species in many different countries). These mussels are now well established particularly in the Shannon and Erne catchments. Users of cruisers, lake boats, jet skies, canoes and any other craft are being asked to co-operate and help prevent this exotic pest spreading to the Great Western Lakes. If Zebra Mussels were introduced to the Corrib / Mask system they would severely impact and change forever the ecology of the lake thus impacting the Wild Brown Trout and other fish species (Regional Fisheries Board, 2007).

2) Seaside/Resort Trips

An important resource to the West as discussed earlier is 'free marine tourism activities' such as seaside/resort trips (i.e. locals trips to the beach, swimming in the sea, walking by residents of coastal areas, as well as trips involving a full day by people living in areas more distant from the coast). The 2003, ESRI study discussed earlier in section 4.2.3 highlighted that 49.3% of Irish residents in the West of Ireland enjoy these 'free marine tourism activities'.

The West of Ireland's seaside resorts, beaches, inland waterways and rivers are a valuable resource for a wide range of water-based tourism recreation, sport and leisure activities. Map 2 discussed earlier in this Chapter highlights the number of beaches as designated bathing areas in Ireland. According to the Marine Institute (2006) mapping study, the West of Ireland scores high in the number, diversity and range of beaches on offer to international and domestic visitors.

The ESRI 2003 domestic market survey results show that 1.48 million persons, representing 49% of the adult population participated in some form of water-based activity during the survey period. The survey found that 189,600 females swim in the sea and 650,800 females take trips to the seaside or beach. Male participation numbers stand at 164,000 who swim in the sea and 483,800 who take trips to the beach or seaside. These findings are in line with marine tourist gender participation characteristics discussed in Chapter 3, where Orams (1999) states in the literature that for a number of water-based activities a demographic pattern exists such as activities perceived as more ‘adventurous’ or having a higher risk of injury, such as surfing, sailing or scuba diving tend to be dominated by males and younger age groups. Where as marine leisure activities that are more ‘passive’ or social tend i.e. trips to the beach, tend to be dominated by older age groups and in some cases by females.

The 2003 ESRI study also estimated total regional overnight spend by domestic tourists on marine seaside/resort trips on the Border, Midlands and West of Ireland (BMW) to be €29.8 million. The values attributed to ‘free marine tourism activities’ in the BMW region included €12.1 million to swimming in the sea and €17.7 million to trips to the beach or seaside. Total direct and indirect employment generated in the BMW region¹¹ (assuming 50% daytrip displacement) is 3,211. See Table 4.7 for employment generated breakdown. In interpreting employment or expenditure data (see tables 4.7 – 4.13 and Appendix 12) the reader must bear a few points in mind. First, there is the issue of recall. Given the highly seasonal nature of participation in marine leisure activity one has little option other than to adopt an annual reference period. The only realistic alternative to this approach would be to undertake an on-going survey throughout the year and record details in respect of the month preceding the survey. By carrying out such a survey on a monthly basis a researcher could build up an annual picture of total expenditure patterns. General issues related to the respondent’s ability to accurately recall expenditure levels over a one-year period must certainly be taken into account. In addition, respondents’ answers in relation to the specific issue of expenditure are subject to their ability to accurately estimate average cost. Both issues clearly impact on the accuracy expenditure estimates recorded in a survey of this nature.

Table 4.7: Seaside/Resort Trips 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 TCC (2002)*

¹¹ Employment multiplier based on Henry and Deane in TCC (2002). Note: no attempt has been made to incorporate changes in either sectoral productivity or, more importunately, import content over the period 2000 (base year of estimation of multipliers) to 2003.

3) Water Sports

Water sport activities include waterskiing, jet skiing, surfing, kite boarding, sail boarding, scuba diving, snorkelling and other sea sports. Marine tourists who engage in this activity spend millions of euro's (see Table 4.8 – 4.10) and are the lifeblood of many small coastal towns in the West region. Typically water sports are provided by the adventure centres and water sport clubs. The performance of the West of Ireland adventure centres is discussed in Chapter Seven.

Table 4.8: Water Sports Breakdown of Spend

	€ millions	€ millions	€ millions
Activity	Equipment	Daytrip	Overnight
Water Skiing, Jet Skiing	13.2	5.5	0.1
Surfing, Sail Boarding	1.1	1.5	5.6
Scuba Diving, Snorkelling	5.9	1.0	3.5
Other Sea Sports	0.3	0.5	0.1
TOTAL	19.5	7.5	8.3

Source: ESRI 2003

Table 4.9: Water Sports Regional Overnight Spend per Activity

	€ millions	€ millions	€ millions
Activity	Border, Midlands and West	South & East	Total
Water Skiing, Jet Skiing	0.1	0.0	0.1
Surfing, Sail Boarding	1.8	2.8	5.6
Scuba Diving, Snorkelling	2.4	1.1	3.5
Other Sea Sports	0.1	0.0	0.1

Source: ESRI, 2003

Table 4.10: Water Sports 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 TCC (2002)*

Source: ESRI, 2003

4) Surfing

The West coast of Ireland experiences the power of the Atlantic waves and makes an excellent spot for surfing. The ragged shoreline means that there are a great variety of beaches to choose from and the surfer has good swells. Popular spots in the West Region include Keel in Achill, Carrownisky and Old Head near Louisburgh. The best surfing waves are in September and October with more peak conditions in April and May. Surf tuition in the region is available at seven adventure centres and from Surf Mayo www.surfmayo.com (accessed June, 2007), (Ginty, 2007).

Surfing is now Ireland's fastest growing sport (Fáilte Ireland, 2008). *"Ireland has some of the best surfing conditions anywhere on the planet outside of Hawaii. Intrepid foreign surfers have been coming here for years, drawn by the Guinness, the famed hospitality and most of all the unpolluted, uncrowded waves The fabled reefs and mythical waves of the West and North coast of Ireland are the stuff of legend in the international surfing community"* (Tourism in Ireland, Special Weekend Supplement, Irish Independent, April, 2007). The popularity in surfing is particularly evident along the West coast of Ireland. Some of the reasons for the explosion in interest is due to the advances in wetsuit and board technology and the Irish population between the ages of 19 – 35 have been introduced to surfing through adventure centres, school/college trips, the media, or have travelled overseas to Australia or the USA and have become interested in this water sport.

5) Coastal Sailing and Inland Boating

At the present time, there is no system in place in Ireland which accurately registers leisure boat ownership, however, a system is currently being developed due to EU legislation and is likely to be operational by 2012 (Irish Marine Federation, 2008). 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 2002 the Marine Institute national water based survey conducted by the ESRI, estimated the type of vessel used for each specific boating/sailing activity. Table 4.11 - 4.13 highlights the spend profile of each category and the employment generated as a result of coastal and inland boating activities.

Table 4.11: Coastal & Inland Boating Breakdown of Spend

	€ millions	€ millions	€ millions
Activity	Equipment	Daytrip	Overnight
Sailing at Sea	9.4	3.1	12.3
Boating at Sea in Rowboats, Canoes etc.	0.6	0.6	2.8
Boating in Power Boats etc	0.7	1.4	2.0
Cruising/Boating on inland Waterways	5.2	6.3	6.4
TOTAL	15.9	11.4	23.5

Source: ESRI 2003

Table 4.12: Coastal & Inland Regional Overnight Spend per Activity

	€ millions	€ millions	€ millions
Activity	Border, Midlands and West	South & East	Total
Sailing at Sea	1.6	10.6	12.3
Boating at Sea in Rowboats, Canoes etc.	1.8	1.1	2.8
Boating in Power Boats etc	0.5	1.4	2.0
Cruising/Boating on inland Waterways	5.9	0.5	6.4

Source: ESRI 2003

Table 4.13: Coastal & Inland 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 TCC (2002)

Source: ESRI 2003

According to the Harbour Master in Galway in 2004 an estimated 16 yachts came into Galway docks during the summer of 2003 despite the absence of a marina. In contrast during 2007 approximately 60 pleasure craft/sailing vessels docked in Galway Harbour (see image 4.1). This demonstrates an increase in sailing vessels wishing to explore the West of Ireland. In February 2008, the Galway Harbour Company launched its first phase of pontoons to support the growing demand for marina facilities in Galway City (see image 4.2).

Image 4.1: 'Tall Ship', Visiting Galway, Summer 2007.



Source: Galway Harbour Company, 2007.

The 25 berth marina received 109 applications (80% from Galway, 10% from Mayo and 10% from Dublin and the UK). The 109 applications were received without a marketing campaign implemented by the Galway Harbour Company, which demonstrates the strong market demand for such facilities. The places were awarded through 'a scoring system' and the pontoon leasing/management fee works out at €300 per metre per year which equates to an annual fee of €3000 per year for a typical ten metre sailing vessel/boat. It is envisaged the €500,000 investment in developing the 25 berth marine leisure facility in Galway, will be paid off within 6 years.

The EU average for a city of Galway's size is 486 berths (ICOMIA, 2006). The current development in Galway represents only 5% compared to other EU cities of similar size. The further 95% of berths required to meet the EU average and to cater for demand will not be realised until Irish 'Foreshore Laws' are updated that focus on the support and development of marine tourism business enterprises.

Image 4.2: Galway Docks, First Phase of a Marina Development, February 2008



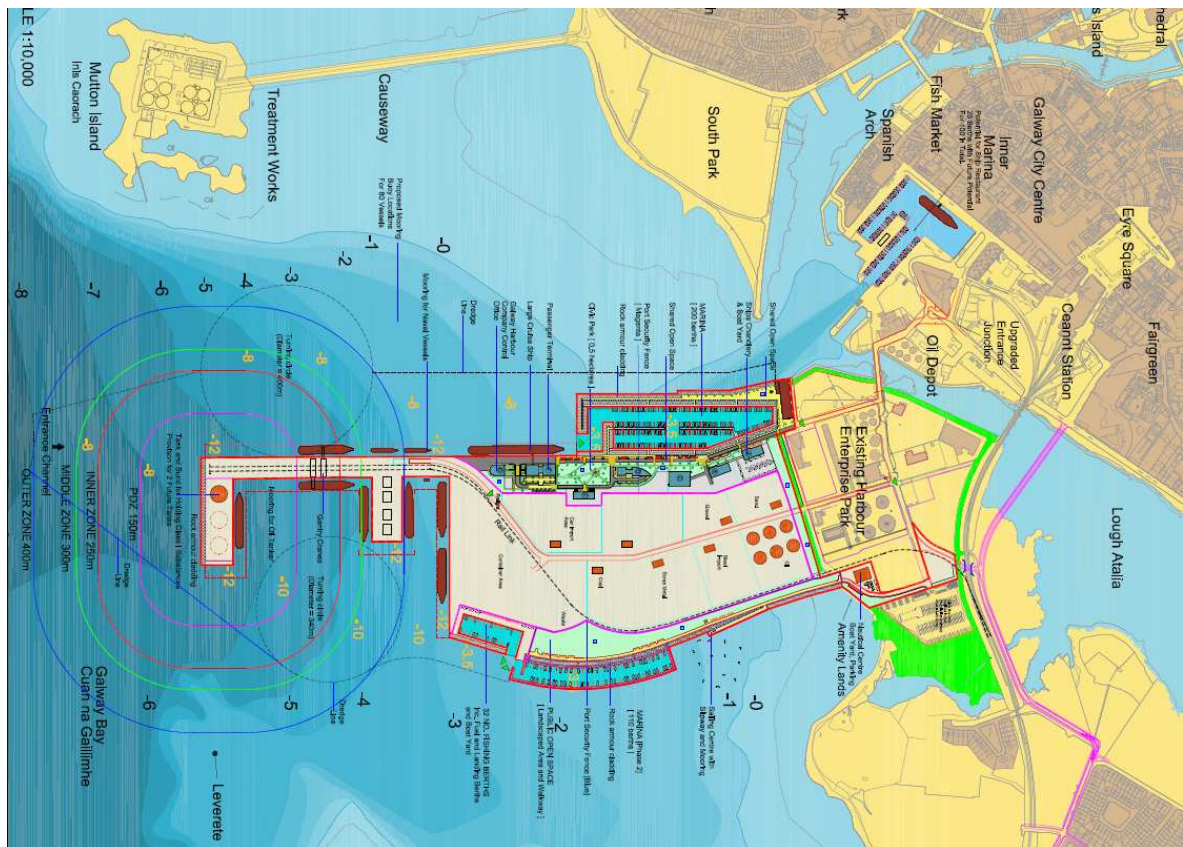
Source: Galway Harbour Company, March 2008.

Cruising represents a major growth area in marine tourism and the amenity value of this class of visitor is generally high as discussed in Chapter 3, which presents many economic opportunities for Galway city. In 2007 a number of cruising vessels arrived in Galway Bay such as the 'Europa' German cruise liner and the 'Minerva 2' from the Bahamas. Both vessels have the capacity to carry 800 passengers. The Galway Harbour is currently not equipped to cater for cruise liners and cruising vessels so they typically anchor off 'Mutton Island' on Galway Bay and ferry people into Salthill or the City via a smaller boat. According to the Galway Harbour Master visitors from cruise ships are typically interested in golfing, coastal recreational activities, coastal bird watching, celtic cruises and various inland heritage tours.

In 2006, the National Development Plan, Galway City Council and the Galway Harbour Company launched a plan for the docks area in Galway to develop a state of the art Harbour Recreational Village and Marine Industry Park including a marina, cafes, bars and restaurants, retail outlets,

residential accommodation and marine sector enterprises. This plan is still on the drawing board and the delays in moving forward with this development include, economic downturn, lack of funding, government support and mainly foreshore law issues and applications that need to be approved (see image 4.3 which represents the new harbour development plan as at March 2008).

Image 4.3: New Harbour Development Plan as at January 2008.



Source: Galway Harbour Company, 2008.

(Note: plans subject to change)

The Volvo Ocean Race Event started 35 years ago and is the biggest Ocean event in the world (available at www.volvoceanrace.org accessed June 2008). For the first time in the event's history, the Volvo Ocean Race introduced significant changes to the race format 2008-2009, and visited new ports along a new route that included stopovers in the middle-east, India and Asia. Galway was selected as a major stopover in the big Ocean event. The Galway harbour was transformed for this event which took place from May 23rd to June 6th 2009 (see image 4.4). The reported economic impact to Galway resulted in €55.8m (Fáilte Ireland, 2009). Fáilte Ireland invested €8m on the infrastructure and marketing requirements to host the Volvo Ocean Race in Galway (Fáilte Ireland, 2008). This infrastructure investment now presents an opportunity for Government bodies to plan for future economic investments and developments in the marine tourism sector. According to the Harbour Master in Galway, if building works on the new harbour development plan (see Image 4.3) started by 2011, the marina facility could increase to 185 berths by 2014 and a further 310 berths could be introduced by 2025. This development would have a long term socio-economic impact on City of Galway and surrounding areas.

4.4 Chapter Summary

This Chapter further informs the development of this study. A key objective of this study was to increase understanding of the marine tourism sector internationally and in Ireland, with particular focus on the West region of Ireland. This Chapter presented a further review of the marine tourist and product literature from an Irish perspective, and a description on the policy providers linked to this sector. In summary, Ireland is a marine nation and the country's marine resource encompasses some 900,000 Km² of seabed. This is an area ten times the land area of the country (Marine Law & Ocean Policy Centre, NUIG 2005). Ireland's ocean economy consists of a diverse set of companies with a combined annual turnover of more than €3 billion employing nearly 22,000 people directly (1.2% of total Irish employment) and another 22,000 people indirectly (Marine Institute, 2005). An ESRI (Economic Social Research Institute) study in 2003 found that Ireland's marine and fresh water resources generates €434 million in expenditure by Irish residents and approximately 5,100 jobs are supported by this level of expenditure.

Sea areas under Irish jurisdiction are of strategic, economic and scientific importance to the European Union and its member states and provide Ireland with the opportunities for transport, fishing, aquaculture, oil and gas production, renewable energy production, marine tourism and leisure as well as a broad range of ancillary services industries. Clearly it is an important national resource and the many opportunities associated with it require research, long term planning and investment, if returns are to be realised in a sustainable way.

There are a number of marine and policy development state agencies connected with a marine leisure brief in Ireland including; the Department of Communication, Energy and Natural Resources, who are responsible for developing Irish marine policy; the Department of Arts, Sport and Tourism, who are responsible for marketing and product development; since 2007, the Department of Environment who is responsible for coastal zone management and the Foreshore Act; the Marine Institute who is responsible for marine research, technology development and innovation; the Irish Marine Federation (IMF) who is the National organisation representing both commercial and leisure sectors of the marine industry in Ireland, and who is also affiliated to the Irish Business and Employers Confederation (IBEC). Tourism Ireland, are responsible for marketing the island of Ireland (north and south) internationally, where as Fáilte Ireland, are responsible for the development of the tourism and hospitality industries in Ireland and marketing to the domestic market. Since April 2008, the responsibility for development of the marine leisure sector now lies with Department of Community, Rural and Gaeltacht Affairs. With the range of state agencies connected with marine leisure, it is not clear who really owns and manages the marine tourism sector, or who is providing leadership, direction and control for the development of this valuable state resource.

In 2003, the ESRI, National Survey of Water-based Leisure Activities, recorded 'trips to the beach and swimming in the sea' as the most popular water-based activity engaged by domestic visitors.

Generating €278 million in domestic tourism revenue and supporting the equivalent of 3,200 jobs in coastal communities. Almost 71,000 beach users and 37,000 swimmers surveyed said they would increase their participation if facilities were better.

This Chapter concludes the literature review (Chapter 2-4) which started with an examination of tourism and the consumer decision making process, the characteristics of small tourism businesses and methods for evaluating the economic impact of tourism. This was followed by the evolution of marine tourism products and the type of people who engage in such activities. Following this a range of Irish policy providers has been discussed, the portfolio of water-based products on offer in Ireland and an assessment on the performance of the marine tourism sector from a global and Irish perspective.

From the literature review three key themes emerged in the evaluation of the marine tourism sector comprising of the marine tourism product, the marine tourist, and policies related to investment and development in marine tourism. From this a research framework entitled *The 3P's Marine Tourism Business Sector Evaluation Model* was proposed with the 3 P's being Product, Person and Policy. This model connects with the main objectives of this research study and it will be discussed further in the research methodology Chapter 5. Following this, Chapter 6 presents the findings from the marine tourism business sector in the West of Ireland and its contribution to the regional economy.

CHAPTER 5 **RESEARCH METHODOLOGY**

5.1 Introduction

This is a business research study with the primary aim being the examination of the marine tourism business sector in the West of Ireland and assessment of its contribution to the regional economy. According to the Irish Regions Office (Irish Regions, 2008), the West Region of Ireland comprises the counties of Galway, Mayo and Roscommon.

From the literature review three key themes emerged in the evaluation of the marine tourism business sector comprising of the marine tourism product, the marine tourist, and policies related to investment and development in marine tourism. From this a research framework entitled *The 3P's Marine Tourism Business Sector Evaluation Model* was proposed.

This Chapter explains the research process, the proposed 3P's evaluation model and the qualitative and quantitative research techniques utilised in this study. It also justifies the approaches taken in the data collection for marine tourism businesses in the West of Ireland.

5.2 Research Objectives

In explaining the rationale for the selected research methods, it is first necessary to examine the objectives followed by the design approaches suitable for this type of data collection. The aim of this research study was to examine the marine tourism business sector in the West of Ireland and assess its contribution to the regional economy and this can be broken into the following more detailed objectives:

- 1) Gain an increased understanding of the marine tourism sector internationally and in Ireland, with particular focus on the West region of Ireland.
- 2) Define the types of direct and indirect marine tourism activities that exist in the West Region of Ireland.
- 3) Analyse the economic benefits of marine tourism business activities, specifically those supporting communities within the West of Ireland.
- 4) Determine the income and cost profile of marine tourism operator businesses in the region and explore how financial leakage from the surrounding communities can be minimised.
- 5) Design an evaluation model that represents the marine tourism sectors contribution to the regional economy.
- 6) Make recommendations on the potential for developing the marine tourism sector in Ireland and the Region.

These objectives may be further broken down into subsections which focus on qualitative and quantitative data collection comprising of:

- (i) Visitor profiles to the West of Ireland.
- (ii) Visitor expenditure on tourism products and services during trips to the West of Ireland.
- (iii) The range and type of water-based activities undertaken by the domestic and international tourist in Ireland and the West of Ireland.
- (iv) An examination of the marine tourism businesses marketing activities, customer profile, business challenges and financial contributions to the region.
- (v) An evaluation of investment and development strategies from policy providers and state support centres in the region.
- (vi) An analysis of a seaside community business performance in the West of Ireland.
- (vii) Construction of an organisational chart for the Marine Tourism Sector in Ireland.
- (viii) The development of an international Atlantic marine tourism site case study to enhance the researcher's knowledge of marine tourism sector capabilities and management processes outside Ireland. (i.e. Newfoundland, Canada). *(Note: The research undertaken to achieve this objective is presented as a case study in Appendix 2.)*

5.3 Research Methodologies

Research involves systematic exploration, guided by well constructed questions, producing new information or reassessing old information. Researchers may already have an intellectual framework, that governs the way they conceive their world and their own place within it. This framework can shape the research from the beginning to end, because it provides the structure within which choices are made (including the initial choice of a research subject). Bertrand and Hughes (2005) explains a researcher's framework comes partly from the institutional setting within which their research takes place, or those who commissioned the research, or by a teacher, by the department within which they work, and by the college or university which employs them. However, part of it will come from a personal position, shaped by previous education, political and religious beliefs, gender, and life experiences.

What is called a framework is sometimes called a paradigm, which allows some questions to be asked and some research methods to be applied to these questions, while at the same time denying the validity of other questions and other methods. Denzin and Lincoln (2000: 157) offer the following useful explanation of how a paradigm shapes a researcher's thinking process: "*a paradigm encompasses four concepts: ethics, epistemology, ontology and methodology. Ethics asks, how will I be as a moral person in the world? Epistemology asks, how do I know the world? What is the relationship between the inquirer and the known? Ontology raises basic questions about the nature of reality and the nature of the human being in the world. Methodology focuses on the best means for gaining knowledge about the world.*" The paradigm categories proposed by Lincoln and

Guba (2000) for qualitative research provides a useful model across all forms of research: positivism, post-positivism, critical theory, constructivism, and participatory action research.

The literature reports positivism as probably the most powerful intellectual framework of the 19th and 20th centuries, across all disciplines. It is built upon the realist assumption that the world is out there waiting to be known (Bertrand and Hughes, 2005). However, the grip on positivism on the scientific world has been weakening over recent decades, as scientific research methodology begins to shift away from the goal of absolute truth, based on claims to objectivity, generalisation and prediction, and find ways to deal with concepts such as 'uncertainty' and 'chaos' (Journal of Communication, LI, No. 3, September, 2001). The post-positivist position begins in the middle of the 20th century with Karl Popper (1902-1994), who demonstrated that falsification (finding a case that does not fit, and so requires a change in theory) is a more logically achievable goal than verification. There are mixed definitions presented in the literature on post-positivism. Lincoln and Guba (2000) attribute to post-positivism an ontology of critical realism, an epistemology that still seeks knowledge and a methodology more open to qualitative methods and the grounded theory arising from these. This definition makes post-positivism a slightly softer, revised, version of positivism. A more inclusive definition proposes post-positivism as the covering term for all the intellectual frameworks which have positioned themselves against positivism. Lather (1991) breaks this field in relation to goals (to understand/to emancipate/to deconstruct). This allows her to acknowledge that all the categories positioned against positivism (including Lincoln and Guba's post-positivism) see the research process to some degree as circular or spiral or cumulative (rather than linear and sequential), prefer qualitative over quantitative methods of research, and apply hermeneutic and contextual explanatory systems within constructivist epistemology.

There has been much debate, especially in the sociological literature, about appropriate research methods for leisure and tourism research, particularly concerning the relative merits of qualitative as opposed to quantitative methods (see Kelly, 1980; Rojek, 1989; Henderson, 1990). In leisure studies there seems to be a strong orientation to maintain quantitative methods as the dominant research mode. Whereas in tourism research, quantitative and qualitative research methods seem to co-exist without the apparent rivalry seen in leisure studies (Veal, 2006). Henderson (1990) points out in discussing qualitative versus quantitative methods: ideally, a researcher who understands the array of methods available through both quantitative and qualitative approaches will be able to address the ways to best study the issues related to leisure.

Furthermore research can take the form of 'pure and applied', 'primary and secondary', 'theoretical and empirical', and 'descriptive and explanatory' research (Wood, 1999). In terms of pure and applied research Wood (1999) explains that, pure research is that which has no obvious practical implications, no obvious use value beyond contributing to a particular area of intellectual endeavour. Applied research is, by way of contrast, problem-orientated, directed towards solving some particular intellectual puzzle that has practical implications. Both pure and applied research can lead to the uncovering of new knowledge and new facts about a

phenomenon or phenomena. Wood (1999) explains that the difference between theoretical and empirical research is a little more complex. In essence, theoretical research is where research activity contributes to the study of a particular area of intellectual enquiry. It can involve the collection of original data, but outside the natural sciences, theoretical research has more abstract and contemplative connotations and may entail acts of interpretation and reinterpretation of existing data to extend the understanding of a given phenomena. In contrast empirical research is a term employed to describe the collection of original data for analysis. In this sense, empirical research is synonymous with primary research. The literal meaning of the term 'empirical' is 'based on observation or experiment, not on theory' (The Oxford Minidictionary, 1991 edition) though, of course, observations, experiments and data can make a contribution to theory just as data arguably must be interpreted using a theoretical framework.

The final distinction often encountered in the literature on research methodology is that between descriptive and explanatory research. Descriptive research is largely concerned with questions of what, when, where and who, whereas explanatory research goes beyond this and is concerned with why and how questions. It can be argued that both these methods are linked, or in fact follow each other (Creswell, 1998). In some cases researchers must undertake a descriptive approach first followed by an explanatory method, in order to fully investigate and resolve the research problem presented. Following on from this, research can be qualitative or quantitative or both. According to Creswell (1998) qualitative study is defined as an inquiry process of understanding, based on distinct methodological traditions of inquiry that explore a social or human problem. The researcher builds a complex, holistic picture, analyses words, reports detailed views of informants, and conducts the study in a natural setting.

The literature reports on a range of research methods available including; scholarship; 'thinking'; secondary data – existing source and using the literature; primary data – from observation, qualitative techniques, questionnaire based surveys; and cross cutting techniques. Scholarship means being well informed about a subject and also thinking critically and creatively about a subject and the accumulated knowledge on it (Veal, 2006). Scholarship involves knowing the literature and is traditionally practised in the role of teacher, but when the results of scholarship are published they effectively become a contribution to research. The second method, creative and informed 'thinking' about a topic, can be the only process involved in the development and presentation of a piece of research (Veal, 2006). However, thinking does require consultation with the literature which leads to the third method 'secondary data' and using the literature. There is virtually no research that can be done which would not benefit from some reference to the existing literature and for most research such reference is essential. Veal (2006) explains secondary research normally implies an activity whereby no new original data is generated but where the research project draws on existing 'secondary' sources alone. In this context secondary research data is usually already in existence taking the form of documental data sets of information. The review of the secondary sources / literature plays a key role in the formulation of research projects such as a PhD. It indicates the state of knowledge on a topic and is a source of, or stimulant for, ideas, both substantive and methodological (Veal, 2006).

In contrast to this, primary research is a term that usually refers to research which involves the collection of original data using an accepted and planned methodology. Such techniques can include observation, which is sometimes referred to as unobtrusive techniques (Kellehear, 1993). This technique involves gathering information about people's behaviour without their knowledge. While in some cases this can raise ethical issues or questions, it clearly has advantages over techniques where the subjects are aware of the researcher's presence and therefore may modify their behaviour. Types of qualitative methods include formal and in-depth interviews, group interviews or focus groups which involve small or larger groups of individuals to obtain large amounts of information. Another method involves participant observation which involves the researcher becoming a participant in the phenomenon being studied. Analysis of texts, also a qualitative method, where the researcher interprets the content of published or unpublished texts (i.e. speeches, media coverage), this is referred to as content analysis or hermeneutics. This technique is not traditionally used in leisure and tourism studies but is attracting increasing attention through linkages with cultural studies and products such as film and television, advertising and postcards (see Kelly, 1980; Rojek, 1989; Henderson, 1990; Bryman and Bell, 2003).

Questionnaire based surveys come in a variety of forms such as face to face or telephone interviews. Questionnaires can also be administered through an electronic/ internet interface. The questionnaire based surveys is the most commonly used technique in leisure and tourism research. This is partly because the basic mechanics are relatively easily understood and mastered, but also because so much leisure and tourism research calls for the sorts of general, quantified statement (Veal, 2006). Questionnaire based surveys are used when quantified information is required concerning a specific population and when individuals' own accounts of their behaviour and/or attitudes is acceptable as a source of information. For example if the researcher wants to know how many people are employed by the business, what type of products do they sell, what issues are they encountering etc. Unlike qualitative techniques, where the researcher can begin data collection in a tentative way, can return to the subjects for additional information and can gradually build the data and concepts and explanation. Questionnaire based surveys require researchers to be very specific about their data requirements from the beginning, since they must be committed irrevocably to a questionnaire. Questionnaires can also lead to the development of case studies. A case study involves the study of an example – a case – of the phenomenon being researched. Cases can consist of individuals (see Rapport and Rapport, 1975; Saunders and Turner, 1987), communities, whole countries (see Williams and Shaw, 1988), organizations and companies (see Harris and Leiper, 1995) or places and projects (see Murphy, 1991). Case studies can range from small-scale to major projects in their own right and a case study can encompass any or all of the techniques discussed above.

Cross cutting techniques, is a term used to describe a number of techniques which are subsidiary to one or more of the major methods discussed above, in that they are a variation on or an application of the major method (e.g. Delphi technique, which uses questionnaires) or cut across

a number of major methods (e.g. action research, which can use any or all of the major methods). With regards the Delphi technique (named after the classical Greek 'Delphic oracle'), is procedure involving the gathering and analyzing of information from a panel of experts on future trends in a particular field of interest (Veal, 2006). This technique is used in some areas of business and technological forecasting and has been used to a limited extent in leisure and tourism. Some types of research can be deliberately designed to involve the researcher in the topic and for the research to be overtly part of the process of bringing about change – such research is termed 'action research'. Again this type of research is less usual in the leisure and tourism context. There are, however, examples of research in the tourism areas which are political related. For example Oppermann (1998) and Ryan and Hall (2001) have reported action research in the tourism sector which has exposed the exploitative practices of sex tourism.

Finally, there are standards for assessing the quality of qualitative studies discussed above (Creswell, 1998; Howe, 1990; Lincoln, 1995; Marshall and Rossman, 1995). The following short list of characteristics of a 'good' qualitative research is presented by Creswell (1998) and it entails rigorous data collection:

- The researcher collects multiple forms of data, summarises them adequately and spends adequate time in the field.
- The study is framed within the assumptions and characteristics of the qualitative approach to research.
- The researcher identifies studies and employs one or more traditions of inquiry.
- The researcher starts with a single idea or problem that s/he seeks to understand, not a causal relationship of variables.
- The study involves detailed methods, a rigorous approach to data collection, data analysis, and report writing.
- The writing is so persuasive that the reader experiences "being there".
- Data is analysed using multiple levels of abstraction. That is, the researcher's work is presented in a way that moves from particulars to general levels of abstraction.
- The writing is clear, engaging, and full of unexpected ideas. The story and findings become believable and realistic, accurately reflecting all the complexities that exist in a real situation.

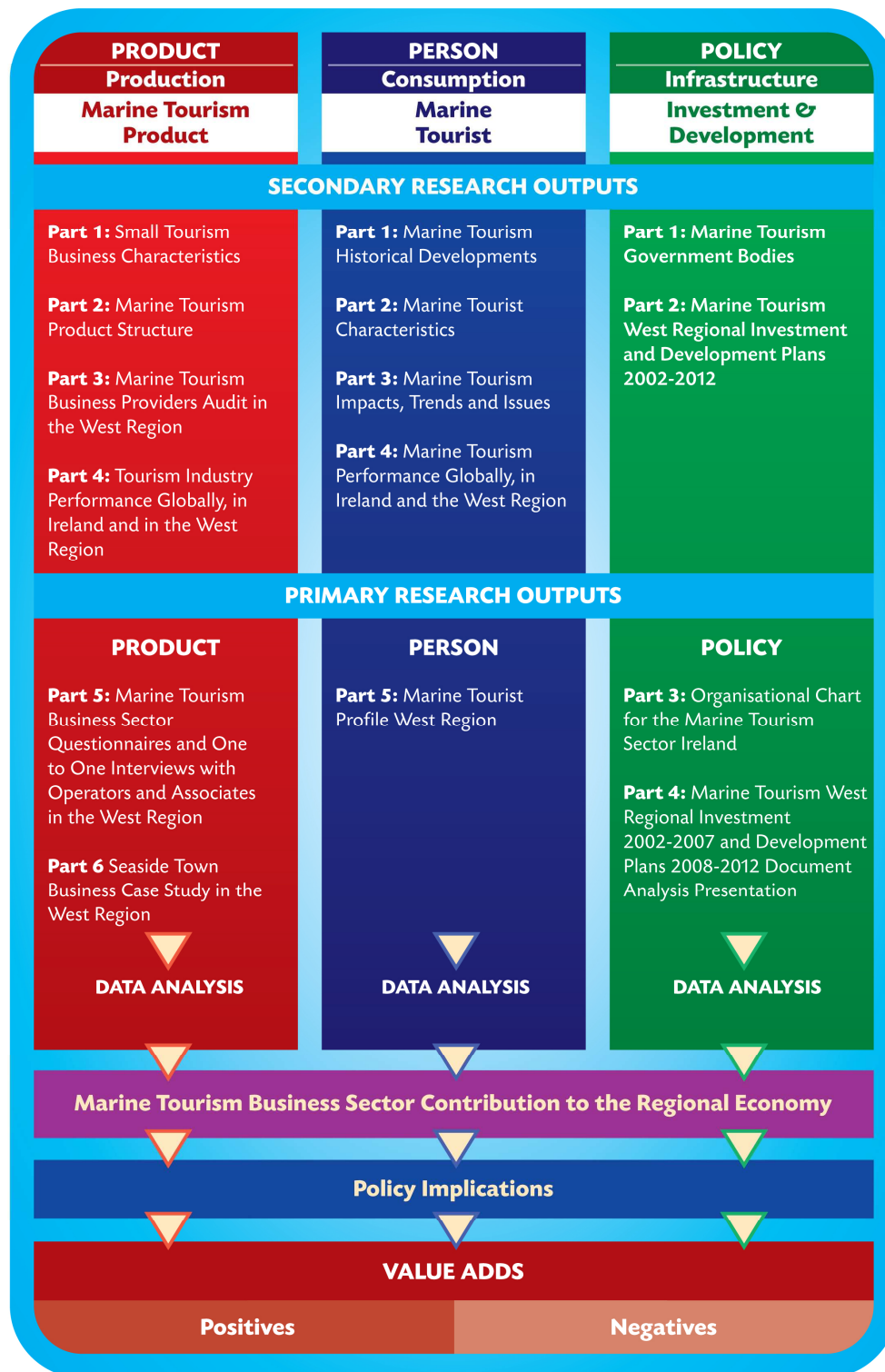
5.4 The Research Process

For this business research study, quantitative and qualitative research approaches were used to assess marine tourism in a specific location, the West of Ireland. The secondary research process provided a comprehensive literature review, which focused on the tourism industry, small tourism businesses, economic evaluation techniques, the marine tourism sector and associated business products and structures. From this research, a Marine Tourism Business Sector Evaluation Model was developed (see Figure 5.1) which highlighted the three most dominant themes that emerged from the analysis: 'Product', 'Person' and 'Policy'. The three themes were then incorporated into the primary research tools which were then developed.

The primary research methods chosen for this study included questionnaires and one to one interviews (see section 5.4 of this Chapter). These methods were selected as the principal research tools as they provide a more in depth and individualized account of respondents' behaviour, attitudes and intentions (Veal, 2006). The methods chosen enabled each marine tourism business in the Region to provide information on their business capabilities and their performance through an individual process, and the development of a business case study on a seaside resort location in the Region. Other techniques, such as the focus group method discussed in section 5.3, would not have gained the depth of understanding or confidential business information required for this type of study. Therefore the methods chosen enabled the researcher to gain an in-depth picture of the regional contribution of the marine tourism business sector.

Figure 5.1: 3 P's Marine Tourism Business Sector Evaluation Model

MARINE TOURISM BUSINESS SECTOR EVALUATION MODEL



Source: Ginty, 2009

5.4.1 Phase One Secondary Research

The secondary research process involved the review of relevant literature on tourism and specifically marine tourism in Ireland with particular emphasis on;

- existing data on tourism in the West of Ireland
- existing data on marine tourism in Ireland.
- existing data on domestic and international visitors to Ireland and the West of Ireland.

In addition tourism strategy documents (national and regional), academic texts, publications, conference papers and a range of relevant international journals in multi disciplinary areas have been reviewed in areas such as marine tourism, leisure and ecotourism etc.

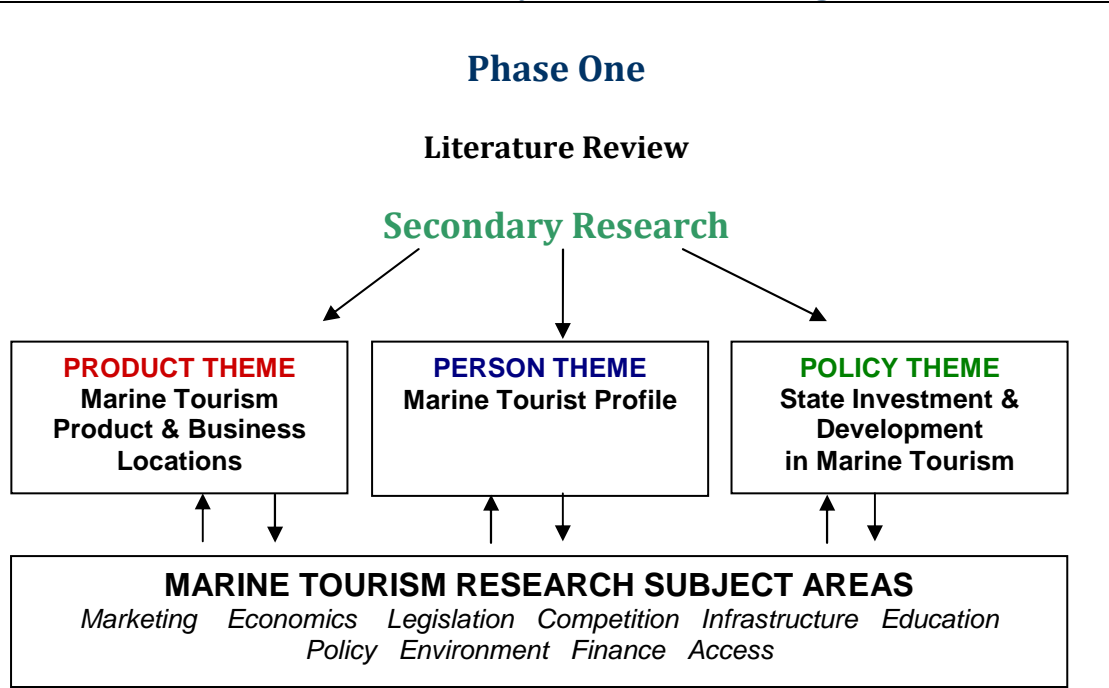
Irish government publications in relation to policy, legislation, insurance, development plans and infrastructure issues have been consulted. Market research agencies and local and international educational institutions have been reviewed on the subject of marine tourism and with the support of the Ireland Newfoundland Partnership, an Atlantic international marine tourism location has also been examined to establish how marine tourism is managed and developed in a location outside of Ireland (The Newfoundland case study is presented in the Appendix 2).

Three themes emerged from the secondary research process, which are outlined in Table 5.1 and the 3P's Evaluation Model (see Figure 5.1).

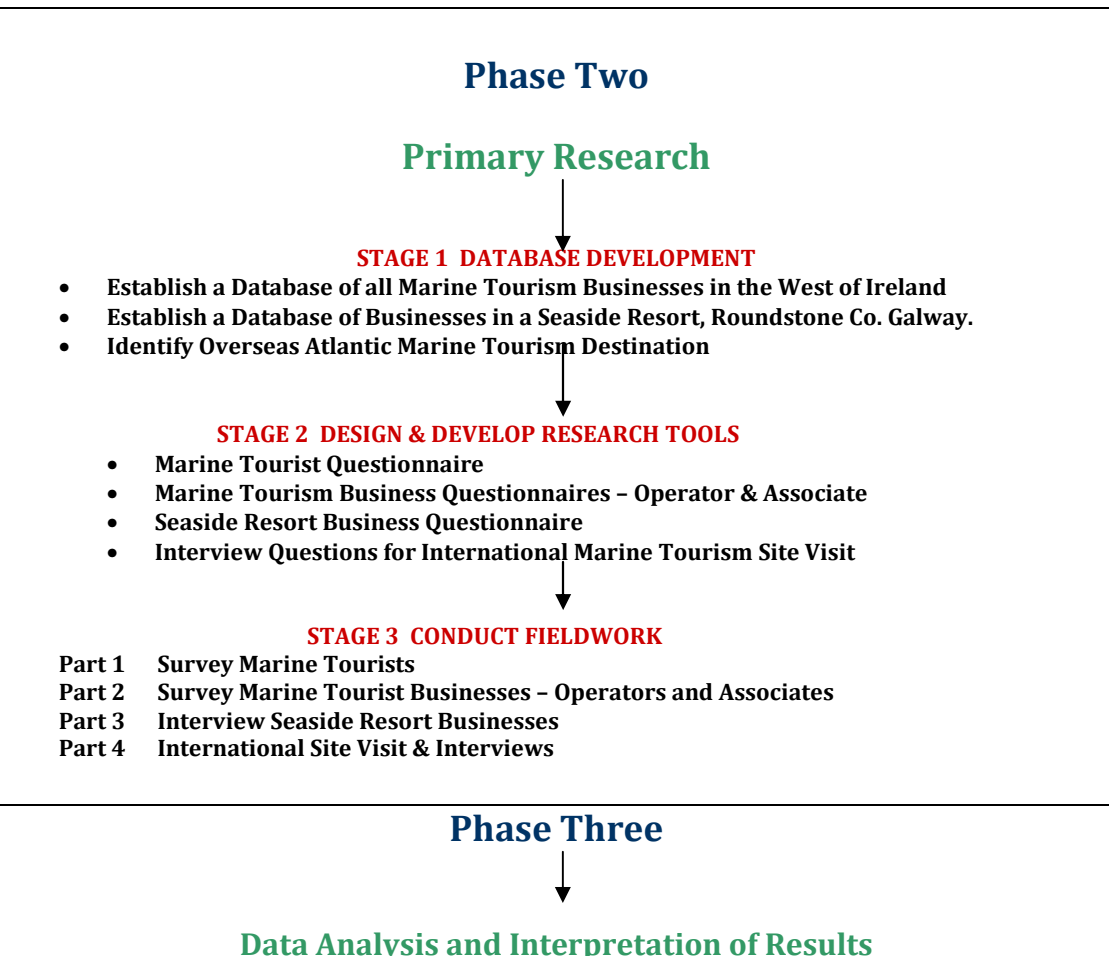
- 1. Product:** Examines the marine tourism products and businesses in the West of Ireland.
- 2. Person:** Examines the tourist profile on a domestic and international level.
- 3. Policy:** Examines state tourism support agent's organisational strategies, level of investment and policies for the region.

Table 5.1 Phase One-Three Research Flow Diagram

Phase One Secondary Research Flow Diagram



Phase Two & Three Primary Research Flow Diagram



5.4.2 Phase Two and Three Primary Research

The primary research programme phase two, as outlined in Table 5.1, consists of three stages. Stage one involved developing two databases of all the marine tourism businesses including 'operators' and 'associates' in the West of Ireland. In addition a separate database was set-up, which included all the businesses in the seaside resort, Roundstone, Co. Galway and a short-list of Atlantic international marine tourism sites was established.

Following this, stage two commenced with the development of research tools. Four questionnaires were developed;

- 1) Marine Tourism Business Questionnaire - for Operators
- 2) Marine Tourism Business Questionnaire - for Associates
- 3) Marine Tourist Questionnaire
- 4) Seaside Business Questionnaire

Stage three involved conducting the fieldwork programme. A range of quantitative and qualitative techniques have been utilised as outlined in Table 5.2. In July 2004, part one of the research study took place which involved surveying marine tourists in the region. The outcomes of the marine tourist study indicated a greater depth of knowledge was required in order to understand the value and contribution of the marine sector in the West of Ireland. Following this, a detailed research programme was put in place, and in August 2005 a pilot study to investigate the performance of marine tourism business operations in the region took place. The pilot revealed a number of adjustments to the questionnaire taking into account differences between the active and passive type marine tourism business operators in the West of Ireland. A restructuring of the fieldwork plan (see Table 5.2 Primary Research Techniques) was also necessary in order to achieve an enhanced picture of the value of the marine tourism sector in the West of Ireland.

The aim of the fieldwork research programme was to understand the marine tourism operators and associates business in relation to finance, marketing, customer profiles and the challenges they face. While also determining the direct economic benefits in terms of income and employment of these businesses and to try to identify the extent to which these benefits are retained within the local community.

It was also necessary to survey a seaside resort in the West of Ireland which focused on the business community performance and the challenges they face. The reason behind developing such a case study was due to the fact there are a number of seaside business communities in the West of Ireland who rely on marine tourists annually to support them and keep the population in the area alive. An ESRI study in 2003 estimated total regional overnight spend by domestic tourists on marine seaside/resort trips on the border, midlands and West of Ireland to be €29.8 million. The values attributed to 'free marine tourism activities' include a total of €17.7 million to

trips to the beach or seaside. This figure is set to increase as access to coastal resorts and investment in infrastructure improves.

An evaluation of an 'Atlantic' twin or partner marine tourism site was an added feature to the study. In December 2006, the researcher was awarded the opportunity by the 'Ireland Newfoundland Partnership' to conduct research in Canada. The international site visit to Newfoundland took place in June 2007, where a number of interviews took place with the Dept. of Tourism, the Marine Institute, Newfoundland University and selected marine tourism business providers on the Newfoundland east coast. The findings from this international research activity are presented as a case study in the Appendix 2. This fieldwork in Newfoundland helped the researcher construct ideas in relation to Irish policy recommendations for marine tourism business development in Ireland.

Table 5.2 Primary Research Techniques

Fieldwork Plan	Research Technique	Target Details	Research Question/Areas
Part One 2004	Questionnaire	Marine Tourist	West of Ireland Water-Based Visitor Profile
Part Two and Four 2005-2007	Two Questionnaires: Operator and Associate	Marine Tourism Business-Operators: Total 61 Marine Tourism Business-Associates: Total 23	<ul style="list-style-type: none"> • Activity type and costs • Tourist/Customer Profile. • Yearly turnover • Proportion of full-time, part-time, casual staff. • Marketing activities. • Origin of main supplies purchased. • Cost of main supplies e.g. wages, insurance etc. • Business plans, strategic vision. • Challenges & constraints.
Part Three 2006	Case Study - Questionnaires and Interviews	Seaside Resort Case Study: Roundstone Connemara, Co. Galway	<ul style="list-style-type: none"> • Local businesses adjacent to the beach – examine two financial periods – November & July. Businesses to include local shop, petrol station, gift shop, newsagent etc. • No. of people employed during each of the financial periods. • Location details, features & facilities of Resort Area. • Attitudes to tourism in their region.
Part Five 2007	International Site Visit & Interviews	Newfoundland, Canada	<ul style="list-style-type: none"> • Newfoundland's marine tourism resources & businesses • Newfoundland's marine tourism sector performance • Marine tourism investment & development plans

Source: Ginty, 2006 and 2007.

Note: See Appendix 3 and 4 for sample copies of the questionnaires and the introduction letter.

5.4.3. Summary 3P's Marine Tourism Business Sector Evaluation Model

In summary three themes emerged from the secondary research process and provided a structure for the primary research methods deployed. This approach enabled the development of an evaluation model for the marine tourism business sector in the region.

Theme One: Product Production – Marine Tourism Product

The product theme emerged from the literature review following an evaluation of the production and delivery of marine tourism products and small tourism business characteristics. An audit of marine tourism products and businesses in the West of Ireland led to the development of suitable primary research tools. The primary research techniques deployed in the Region involved surveying or interviewing the marine tourism operator businesses and associate businesses to ascertain their performance, capabilities and economic contribution to the Region. In addition a business case study has been developed on a seaside resort town, Roundstone in the Co. Galway in the West of Ireland. The product primary research findings are presented in Chapter Six.

Theme Two: Person Consumption – Marine Tourist

The person theme also emerged from the literature review and focuses on the marine tourism business customer - the marine tourist. The literature review examined the performance of the tourism industry and the business of tourism and consumer motivations. From a macroeconomic point the key issues explored in the literature include participation increases and declines for different marine tourism product areas. The microeconomic issues focus on 'what is available to tourists when they arrive in the West of Ireland', 'what are tourists interested in doing', 'what is not available in the region and what is needed'. The marine tourist primary research findings include a water-based visitor profile for the Region which is presented in Chapter Six.

Theme Three: Policy Infrastructure – Investment and Development

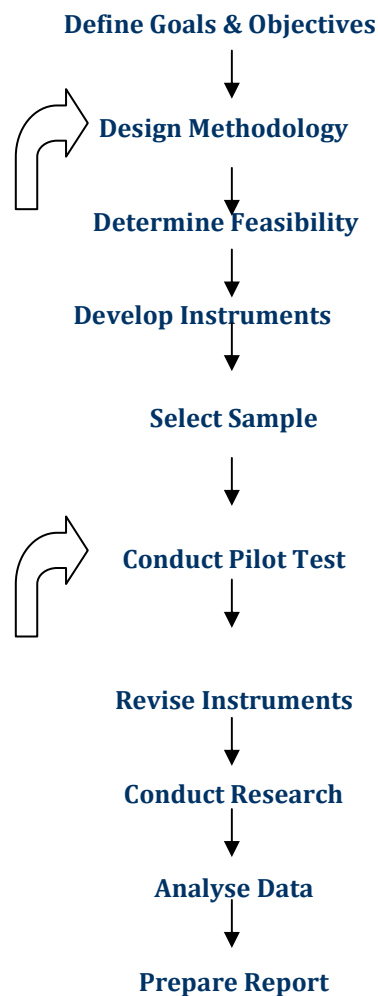
Finally the policy theme, which also emerged from the literature review focuses on the investment and development in infrastructure to grow and support the marine tourism sector in Ireland and the region. The literature review examined the structure of tourism support agents and the level of support from state support bodies for marine tourism in Ireland. In addition a document analysis was undertaken which examined national and local government strategies and investment in marine tourism from 2002 and future plans. The findings from this document analysis are presented in Chapter Seven.

The final outcomes from the '3P's Marine Tourism Business Sector Evaluation Model' indicate the marine tourism business sectors performance, capabilities and overall economic contribution to the regional economy. Chapter Eight presents the conclusions and recommendations outlining policy implications for the 3P's, original contributions, study outcomes and future research opportunities.

5.5 Questionnaire Design

Research is defined in the dictionary as a 'systematic investigation to establish facts or collect information on a subject' or 'to carry out investigation into a subject, etc.' (Oxford Dictionary 2000). Brotherton (1999) puts it simply, when the two meanings are combined, survey research is about looking and searching in order to answer a question, or a series of questions. As discussed in section 5.3 and 5.4 the main research methods or measurement tools utilised in this study are the questionnaire and interview. This primary research data collection approach required obtaining information from businesses in the West of Ireland relating to; their customer profiles, sales and marketing activities, financial data and the challenges facing their business and sector. Due to the personal and confidential data that was required, it was necessary to undertake a one to one interview in certain circumstances, in order to uncover this depth of information on their business and on the sector as a whole.

Figure 5.2 Questionnaire Research Flow Chart



Source: Adapted and Modified from Tourism & Leisure Research Methods, Finn, White and Walton, (2000).

The questionnaire research design proceeds in an orderly and specific manner. Each item in the flow chart (see Figure 5.2) depends upon the successful completion of all the previous items. Figure 5.2 is adopted from Finn, White and Walton (2000) and has been modified to include all stages encountered in this study and to incorporate two feedback loops in the flow chart, which allowed for revisions to the methodology and instruments.

In order to collect information on the marine tourism sector in the West of Ireland four types of questionnaires were developed (see the Appendix 3 and 4). Each questionnaire was linked to the themes that emerged from the literature review.

- **Questionnaire One** was geared to the Marine Tourist (*Part One of the Primary Research Programme*)
- **Part Two and Four: Questionnaire Two and Three** focused on the Marine Tourism Business Sector. The first for the 'operators' and the second for the 'associate' businesses. The operators are businesses selling marine tourism activity packages. On the other hand, associate businesses are selling marine tourism equipment such as fishing rods or tackle, surfing boards, or other marine related items. (*Part Two and Four of the Primary Research Programme*)
- **Part Three: Questionnaire Four** was aimed at a variety of businesses in a seaside village in the West of Ireland. (*Part Three of the Primary Research Programme*)

Extreme care was paid to the construction, pre-testing and piloting of the questionnaire. Attention was paid to;

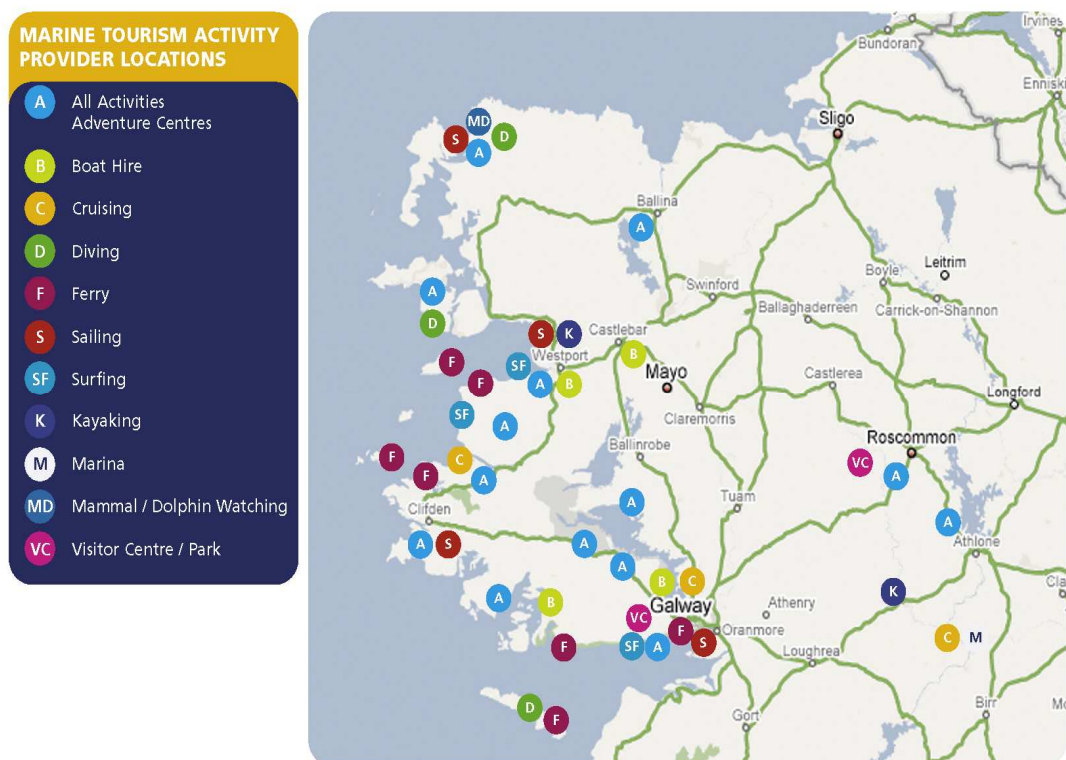
- i. The information required needed to link to the themes (Product, Person and Policy) that emerged from the literature review and the overall research objectives.
- ii. The target respondents and the time it would take to complete the questionnaire.
- iii. The content and phrasing of each question.
- iv. The sequence and format of each question.
- v. The layout and the section headings in the questionnaire.
- vi. Pre-testing and revising the questionnaire.
- vii. Piloting and adjusting the questionnaire to suit the target groups.

In all surveys, it is good practice to pilot the questionnaire or interview (Oppenheim, 1992; Fink 1995). It is necessary to test the feasibility of the research and the usefulness of the instrument.

5.6 Sampling Design

The number of communities in the West of Ireland whose economies are in some way linked to marine based tourism is extensive. It was necessary to develop an appropriate sampling frame to reduce these to a manageable and yet representative number. In doing this the size and nature of each community was considered (i.e. urban, fishing based, beach provider, provision of sailing facilities, etc). In 2006, there were 61 marine tourism operators in the region, with 54% in Galway, 38% in Mayo and 8% in Roscommon. In 2007, there were 23 marine tourism associate businesses identified in the region, with 73% (17) in Galway, 22% (5) in Mayo and 4% (1) in Roscommon. The final sample of marine tourism operators in the West is outlined in Table 5.3 and the final sample of associate businesses in the West is outlined in Table 5.4. They consist of a series of communities with differing marine tourism provisions, infrastructures and populations. Map 14 below, highlights the marine tourism product and business locations in the West of Ireland.

Map 14 Marine Tourism Product and Business Locations in the West of Ireland



Source: Ginty, 2008.

Table 5.3 Marine Tourism Business Operators in the West of Ireland

Marine Tourism Activities Provided By Each County in the West of Ireland								
MARINE TOURISM ACTIVITY	NO. of REGIONAL BUSINESSES (RB)	No. of Operators Co. Galway	%	No. of Operators Co. Mayo	%	No. of Operators Co. Roscommon	%	
All*	10	3	30	5	50	2	20	
Boat Charter	5	2	40	3	60	0	0	
Canoeing/Kayaking	4	3	75	1	25	0	0	
Cruising	4	3	75	1	25	0	0	
Diving	5	2	40	3	60	0	0	
Fresh Water Angling	8	3	37.5	3	37.5	2	25	
Sea Angling	5	3	60	2	40	0	0	
Island Ferries	5	4	80	1	20	0	0	
Jet Ski Charter	1	1	100	0	0	0	0	
Marina - Fresh Water	1	1	100	0	0	0	0	
Marina - Sea Base	0	0	0	0	0	0	0	
Mammal Watching	0	0	0	0	0	0	0	
Safari	2	2	100	0	0	0	0	
Sailing	4	3	75	1	25	0	0	
Surfing	3	1	33.333	2	66.667	0	0	
Windsurfing	1	1	100	0	0	0	0	
Water Theme Visitor Centre	3	1	33.333	1	33.333	1	33.333	
TOTAL OPERATORS BY CO.	61	33	54%	23	38%	5	8%	

All* = Marine tourism operators providing a 'full suite' of water-based activities from canoeing, surfing, sailing, nature appreciation, instruction, accommodation etc.

Source: Ginty, Marine Tourism Operator Audit, 2005 and 2007.

Note: Table 5.3 was generated following analysis of the marine tourism operator survey findings. A complete database of all marine tourism operator businesses is available in the Appendix 5.

Marine tourism operators are businesses selling marine tourism activity or adventure packages to domestic and international marine tourists.

Table 5.4 Marine Tourism Associate Businesses in the West of Ireland

Marine Tourism Associate Businesses West of Ireland								
MARINE ASSOCIATE OFFERING	NO. of REGIONAL BUSINESSES (RB)	No. in Co. Galway	%	No. in Co. Mayo	%	No. in Co. Roscommon	%	
TOTAL ASSOCIATES BY CO.	23	17	73.91304	5	21.73913043	1	4.347826	

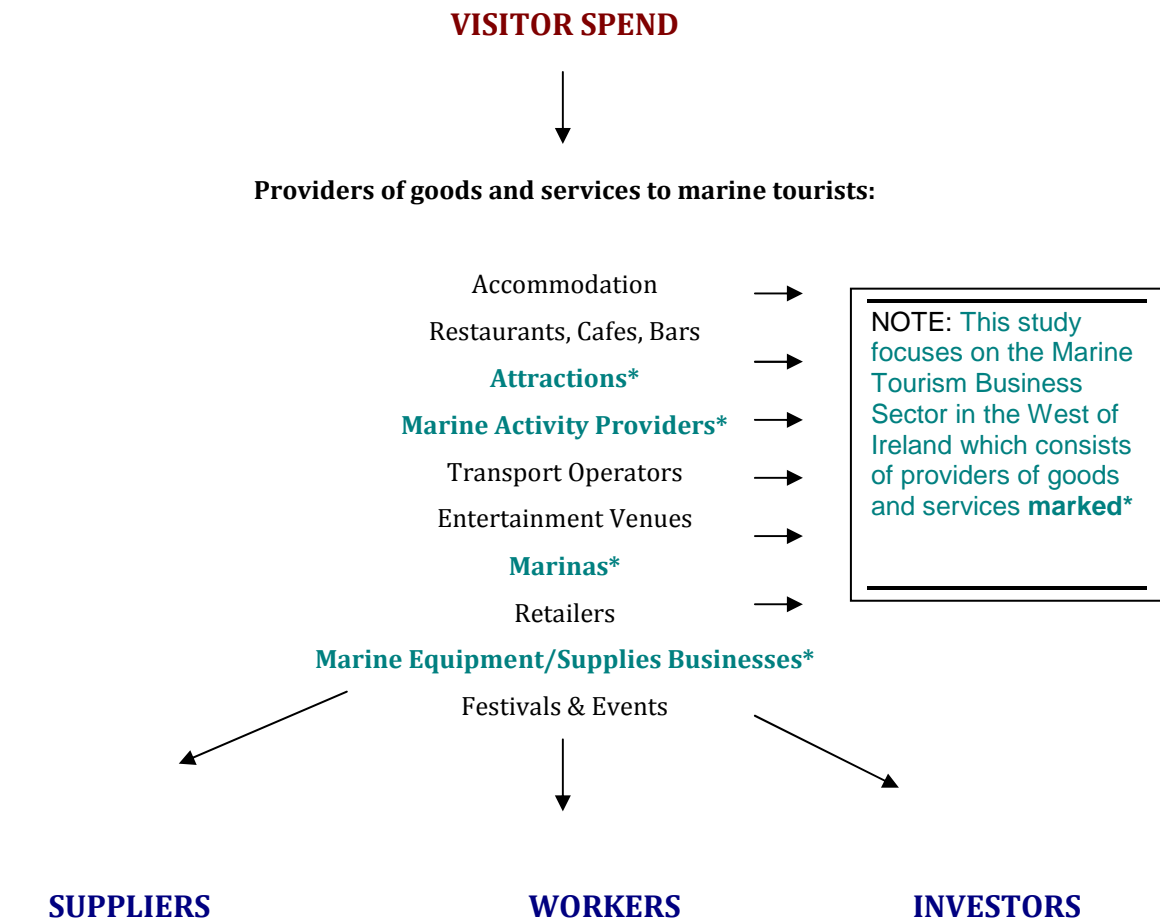
Source: Ginty, Marine Tourism Operator Audit, 2005 and 2007.

Note: Table 5.4 was generated following analysis of the marine tourism associate survey findings. A complete database of all marine tourism associate businesses is available in the Appendix 6.

Marine tourism associate businesses in the West of Ireland typically offer a range of marine tourism related services and products including; fishing gear and tackle, boat engines, marine vessel and electronic maintenance services, marine tourism equipment such as canoes or surfboards, clothing for waterbased activities, licenses, navigational maps or boats/sailing vessels to purchase (see Chapter 7 for findings on the operator and associate businesses service and product offerings).

Within each community a sub-sample of business types to survey were identified to determine the benefit that they derive from marine tourism activities. Nearly all marine tourism businesses in the west of Ireland were surveyed. See breakdown of business groups in Figure 5.3.

Figure 5.3 Flow of Visitor Spending Through Local/Regional Economies



Note: Figure 5.4 adopted and modified from the META Group.

Part one of the research programme took place in 2004 and it involved conducting a water-based visitor profile study in the West of Ireland with a sample of 125 water-based visitors. The findings from this visitor study demonstrated a need to develop this study further, in order to investigate the marine tourism business group contribution to the West regional economy. As a result this study expanded and became a PhD research programme.

Part two of the fieldwork research programme commenced in August 2005, where a cross section of marine tourism operators (i.e. adventure centres, angling centres, ferry companies etc.) were surveyed to determine the direct benefit of this form of tourism.

In June 2006, part three of the research programme involved the development of a seaside resort evaluation case study in Roundstone, Connemara, Co. Galway. This was selected after consultation with the Marine Institute¹². The seaside resort choices included;

- Salthill in Galway
- Roundstone in Connemara,
- and Achill Island in Co. Mayo.

Roundstone in Connemara was selected as it represents a good example of a West coast contained seaside settlement resort. Also due to the fact the size of the resort was manageable and contained within a two mile area. In addition the complete business group in Roundstone servicing the domestic and international visitor could be surveyed.

The Roundstone seaside resort case study focuses on the financial performance of businesses and the challenges they face. The case study examines;

- Free and Paid Marine tourism products available in the seaside resort area.
- The income and cost structure during two financial periods of a year i.e. summer and winter.
- Local business attitudes to tourism and challenges in their local community.

Part four of the fieldwork research programme commenced in August 2007, where a cross section of marine associate business providers (i.e. tackle shops, marine equipment providers, marine boat maintenance etc.) were surveyed to determine the direct benefits to the marine tourism sector in the West from their business activities.

5.7 Data Collection

As outlined in Table 5.2 there are five parts to the primary research programme. Part one involved surveying a sample of water-based tourists in the West of Ireland in 2004. This report was commissioned by the Marine institute and was conducted by the GMIT, West of Ireland Centre for Tourism and Hospitality Research. The aim of the report was to gain an insight into the 'profile' of marine tourists in the West of Ireland.

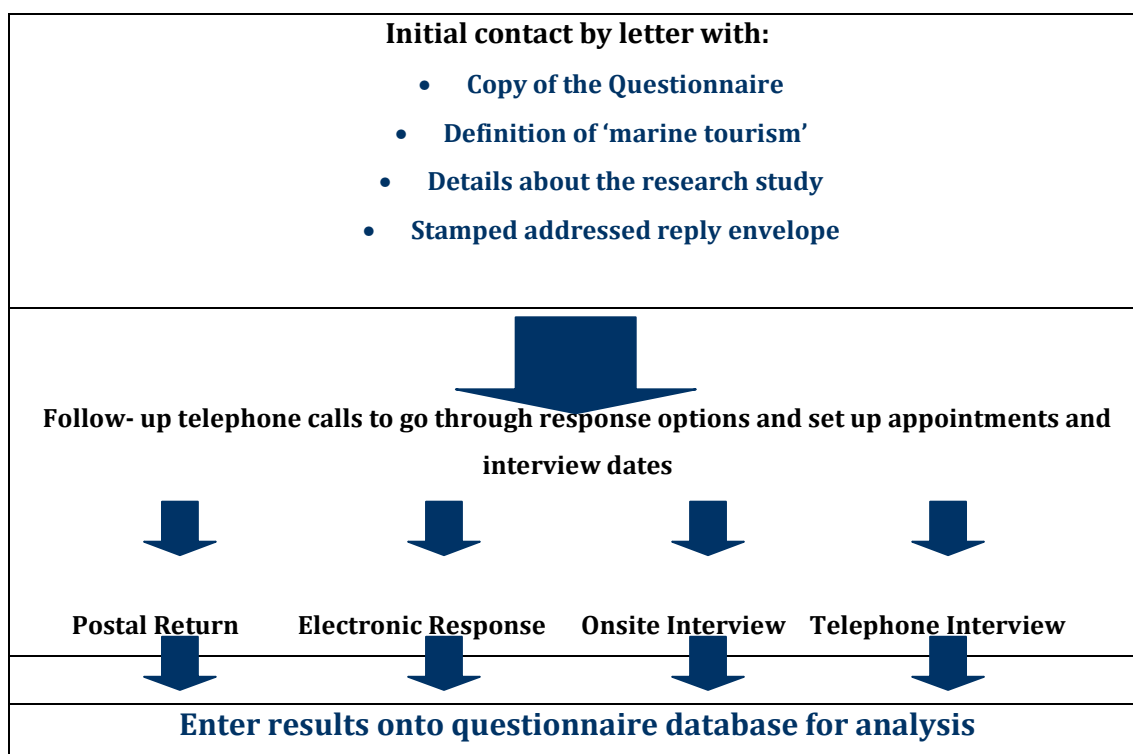
In part two and four initial contact with the marine tourism businesses was made by letter with a hard copy of the questionnaire. The letter was issued by the West of Ireland Centre for Tourism and Hospitality Research and gave some background information to the purpose of the survey and contact details of the researcher.

The letters were accompanied by questionnaires, which were posted, to all 61 tourism business operators identified in the West of Ireland. Businesses were given the option of returning a

¹² Anne Wilkinson, Marine Leisure Manager, Marine Institute, Ireland 2002.

completed version of the paper questionnaire by post, or an electronic version by email or completing the survey online or to participate in a one to one onsite/telephone interview.

Table 5.5 Conducting the Survey Part Two



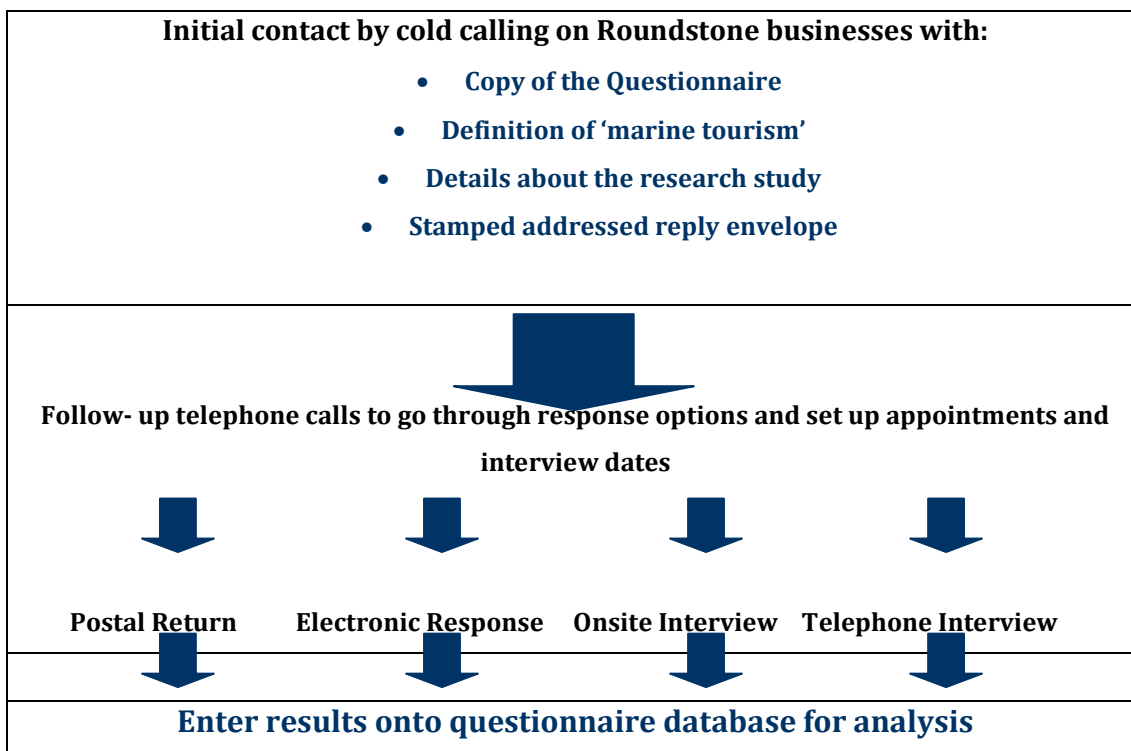
In total, 50 marine tourism operators have participated in part two of the research programme. This represents a response rate of 82% of marine tourism operators in the West of Ireland overall. In each water based category the sample representation ranges from 60% - 90%.

In total, 15 marine tourism associates participated in part two of the research programme. This represents a response rate of 65% of marine tourism associates in the West of Ireland.

In part three of the research programme initial contact was made by visiting the seaside town of Roundstone and cold calling on each of the businesses (15 businesses in total). Each business visited in the town received an introduction on the research study and was left a questionnaire outlining response options and contact details of the researcher (see Table 5.6).

The fieldwork was followed up with phone calls to each business to remind them of their response options and to complete the questionnaire by phone if their time allowed. If not a suitable time was set up to conduct the interview by phone or face to face. It was also necessary to meet local marine tourism related interest groups (such as the Roundstone Beach Conservation Group) to capture their feelings of the challenges facing Roundstone today and the future.

Table 5.6 Conducting the Survey Part Three



The small size and proximity of the businesses to each other in Roundstone town allowed for the complete site to be surveyed enabling a 100% response rate.

5.8 Ethical Considerations, Data Preparation, Entry and Analysis

Ethical considerations concerned with such matters as plagiarism and honesty in reporting results, arise in all research, but additional issues arise when the research involves human subjects, in both biological and social sciences (Veal, 2006). The principles underlying 'research ethics' are universal, they concern things like honesty and respect for the rights of individuals. For GMIT undergraduate and post graduate programmes there is a code of ethics which is enforced by an ethics committee. This research topic, proposal and methodology was also approved and deemed appropriate by the Strand I HEA (Higher Education Authority) funding body, supervisors, Fáilte Ireland, the Fáilte Ireland scholarship award review committee (who supported the study to PhD level) and the Ireland Newfoundland Partnership funding award committee.

Every research study involving human respondents raises a unique set of ethical issues. According to Polit and Hunger (1993), ethics refers to the quality of the research procedures with respect to their adherence to professional, legal and social obligations to the research subject. Codes of research ethics have intrinsic value in protecting the rights of the individuals who may become involved in the research study, but they also serve a professional and organisational function. The ethical issues presented to the researcher were addressed in the design and

conduct of the research study and the reporting of the results. In designing and conducting this business research study every business owner/manager had the right to refuse to participate, subjects would take part on the basis of informed consent and no harm would befall the research subjects.

The findings represented the entire marine tourism business group in the region and therefore no financial findings from one business were named in the study. In keeping with the ethical considerations required of this study clear procedures were also set up for data entry and analysis which are discussed below.

A. Checking each questionnaire completed for accuracy

A procedure was developed for logging the information from each business and keeping track of it on a Microsoft excel spreadsheet. In the case of business operators each business was assigned a number from 1-61. The data was stored in excel until such time was allocated to complete a comprehensive data analysis. It was important to design the database that enabled an assessment by the researcher at any time to see what data was already in and what was still outstanding. It was also critical that the original data records were recorded in a hard copy file with each business name corresponding to the business number on the excel database. This enabled the researcher to trace a result from a data analysis back to the original forms on which the data was collected. The database for logging the incoming data was a critical component of the research programme.

B. Entering the data into the computer

As soon as the data was received it was checked for accuracy. There were several questions considered as part of this initial data screening:

- Are the responses legible/readable?
- Are all-important questions answered? i.e. turnover or number of employees
- Are the responses complete?
- Does a contact need to be marked for a 'follow-up' call or face-to-face interview.
- Is all relevant contextual information included (e.g., data, time, place)?

The quality of measurement is a major issue in most social research. Assuring that the data collection process does not contribute inaccuracies helps assure the overall quality of subsequent analyses (Trochim, 2001).

C. Developing and documenting a database structure that integrates the various measures and enables a comprehensive data analysis.

The database structure was developed in Microsoft Excel, where all the data has been stored, updated and assessed at different points during the life of the research project. Once the data had

been entered it was necessary to transform the raw data into variables that were usable in the analyses. The data analysis involved categorising findings under key headings including; products, marketing, customers and a financial analysis, and the business challenges of the marine tourism sector in the West of Ireland. The financial data analysis involved generating the mean income, the number of employees and expenses. Quantitative data was presented in pie charts, bar charts or tables where appropriate.

5.9 Limitations

Limitations for any particular research study are inevitable and can influence the extent to which useful meaning can be derived in relation to the phenomenon being studied (Guba and Lincoln, 1994). A number of challenges were presented to the researcher during the administration of the study, and these include theoretical and practical limitations. Firstly, taking all the above ethical considerations and data entry procedures into account, leisure and tourism research faces difficulties in the area of validity, especially in the measurement of attitudes and behaviour, as there are always doubts about the true meaning of responses made in surveys, interviews, and self-reported accounts of behaviour. The primary research activities undertaken in this study is reliant on people's own reports in the form of responses to questionnaire based interviews and other forms of interview. These instruments are subject to a number of imperfections, which means that the validity of leisure and tourism data can rarely be as certain as in the natural sciences.

With regards reliability, as this is a business research study it deals with marine tourism business managers/owners in differing and ever-changing social and economic situations. While an individual person's report of his or her behaviour or business performance may be accurate, when it is aggregated with information from other people, it presents a snap-shot picture of a group of people, which is subject to change over time, as the composition of the group change, or as some members of the group change their patterns of behaviour.

Also ethical considerations limit the choice of the research method used. Questionnaires and one to one interviews were the most appropriate tools for this type of study in order to meet the overall aim and objectives. It was necessary to target marine tourism organisations on an individual basis due to the sensitive questions presented in the questionnaires involving financial performance and personal business challenges they were encountering.

Other limitations encountered included businesses that were not willing to participate in the study due to their frustration with state 'tourism support agents' and their lack of support on their business needs, or cautious businesses were not willing to part with true turnover figures due to VAT threshold and revenue concerns. In addition, marine tourism businesses are faced with seasonality challenges and this impacted the researchers contact times with the businesses.

The remote locations of a number of water-based activity centres in the Region presented a number of challenges to the researcher. Most businesses needed to be contacted 3-4 times before participation commitment and this resulted in a slow response to the questionnaires. This was further compounded by weak communications technology infrastructure that existed in some rural tourism locations. No broadband or Internet connection was available in some locations that could have enabled electronic responses for some businesses. In relation to the sample size, there were a low number of marine tourism businesses to evaluate in the Roscommon area. Therefore the analysis focuses on the dominant coastal areas of Galway and Mayo.

Finally, the primary research findings in this study are specific to the region studied and it may be difficult to draw generalisations. Therefore the research findings in this study relate to the marine tourism businesses involved, at the time and place the research was carried out. It is also important to note the businesses were reviewed over a two year period from 2005-2007 when the economic situation was much better.

Despite such limitations a high percentage of marine tourism businesses have been surveyed and the data collected and analysed has provided key insights into the value and contribution of the marine tourism business sector to the West of Ireland's regional economy.

5.10 Chapter Summary

This Chapter explains and justifies the research design approach and the collection of data and information on the marine tourism sector. The main aim of this study is to examine the marine tourism business sector in the West of Ireland and assess its contribution to the regional economy. From the literature (Chapter 2-4) an evaluation model emerged titled the 'Marine Tourism Business Sector Evaluation Model'. This model demonstrates three data collection streams including; 'Product', 'Person' and 'Policy' and enables an evaluation of the marine tourism business sector capabilities, performance and its overall contribution to the West of Ireland's regional economy.

The principle primary research methods chosen for this research study involved developing questionnaires and interviewing the marine tourist and the marine tourism business sector in the West of Ireland. The marine tourism business sector in the region is made up of small and micro businesses consisting of 61 operators (Ginty, 2006) and 23 associates (Ginty, 2007). The operators are businesses selling marine tourism activity or adventure packages to domestic and international marine tourists. Whereas the associate businesses are selling marine equipment such as; fishing rods or tackle, chandlery, surfing boards, sailing equipment, marine electronics or other marine maintenance services to operators, boat owners, locals, fishermen, state agents and tourists. The Roundstone seaside resort case study research method involved site visits and one to one interviews with seaside businesses. These businesses are also classified as SMEs. The interview questions focused on the marine tourism products available in the resort, the financial performance of businesses, their attitudes to tourism and the challenges they face in their village and the region.

The primary research activities undertaken in this study is reliant on people's own reports in the form of responses to questionnaire based interviews and other forms of interview. These instruments are subject to a number of imperfections, which means that the validity of leisure and tourism data can rarely be as certain as in the natural sciences. Despite such limitations a high percentage of marine tourism businesses have been surveyed and the data collected and analysed has provided key insights into the value and contribution of the marine tourism business sector to the West of Ireland's regional economy. In total, 50 marine tourism operators participated in the study. This represents a response rate of 82% of marine tourism operators in the West of Ireland overall. In each water based category the sample representation ranges from 60% - 90%. In total, 15 marine tourism associates have participated in the study which represents a response rate of 65%.

Finally, the primary research data is presented in Chapter 7, which provides key insights into the value and contribution of the marine tourism business sector to the West of Ireland's regional economy. It is important to note that, the findings presented in Chapter 7 are specific to the region studied and it may be difficult to draw generalisations.

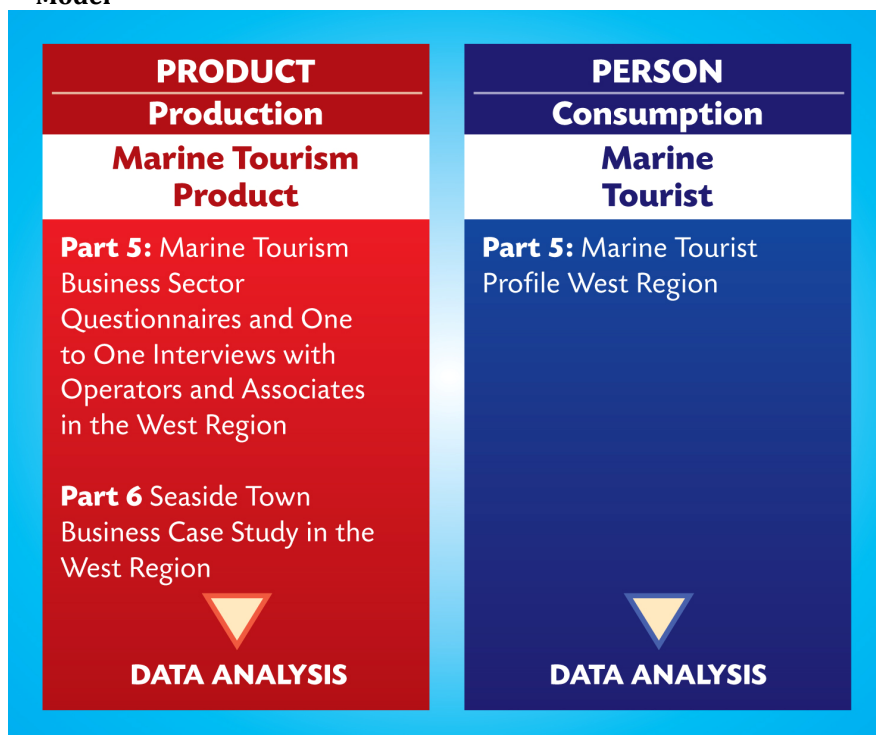
CHAPTER 6 MARINE TOURISM BUSINESS SECTOR WEST REGION - PRODUCT AND PERSON FINDINGS

6.1 Introduction

Despite the growing importance of the marine environment in Ireland, little is known about the value of the marine tourism business sector from a regional and national perspective. This Chapter specifically examines the marine tourism business sector primary research findings in the West of Ireland (i.e. Galway, Mayo and Roscommon) from 2004-2007. The findings include a water-based visitor profile and the marine tourism operator and associate businesses capabilities and performance. This research study is the first of its kind in Ireland and contributes to the general understanding of the social and economic impact of marine tourism businesses in a region as well as the linkages between the marine tourism businesses and Government agents in Ireland.

The findings in this Chapter provide an understanding of the marine tourism business sector in the region under two major themes including product and person (see Figure 6.1 below - extracted from the '3P's', see Chapter 5). The 'Product' aspect presents business marketing findings, financial performance, challenges facing the businesses and the economic impact of the marine tourism operators. The 'Person' aspect focuses on a water-based visitor profile in the West Region. This Chapter concludes with a West of Ireland seaside town case study which evaluates the performance of businesses in a coastal village.

Figure 6.1 Product and Person Aspect of the Marine Tourism Business Sector Evaluation Model

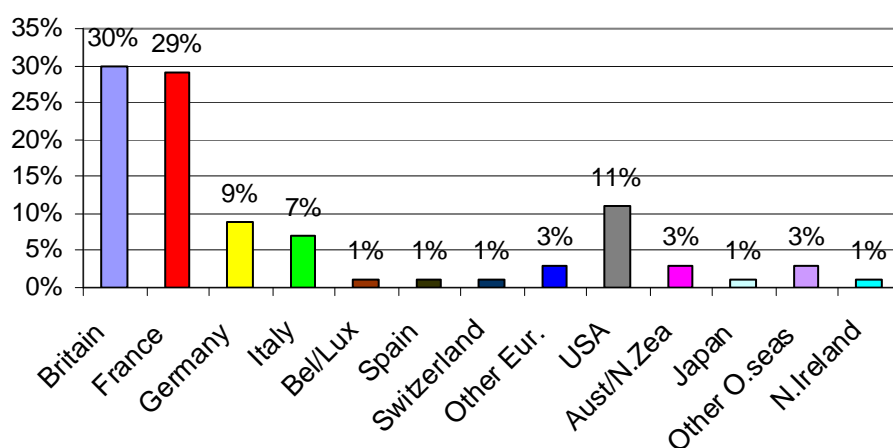


Source: Extracted from the 3P's Marine Tourism Business Sector Evaluation Model, see Chapter 5, Figure 5.1.

6.2 West Region Water-Based Visitor Profile

In 2004, the West of Ireland Tourism and Hospitality Research Centre (WITHR) at GMT completed a Marine Institute funded study focusing on developing an understanding of Water-based Tourism in the Region. The study revealed that the largest numbers of respondents were from Britain (30%), followed by 29% from France (see Figure 6.2). This is in line with Fáilte Ireland reports on overall tourism performance in the West of Ireland, which also identifies the UK as the largest overseas market. Wave surfing, canoeing, sea kayaking and visits to islands off the West coast were the most popular activities engaged by respondents.

Figure 6.2: Profile of Overseas Visitor by Country



Source: WITHR, Water-Based Visitor Profile Study, 2004.

There appears to be no difference between genders, however, age and occupation do appear to play a key role. Almost two thirds (62%) of participants surveyed are under 35 years of age with the largest proportion in the 19-24 year old category. Students are one of the key consumers of water-based activities, followed by teaching and management sectors. There are a limited number (7%) of retired people taking part in water-based activities. Thus water-based activities appear to attract a 'younger' market as outlined by Orams (1999) in Chapter Three.

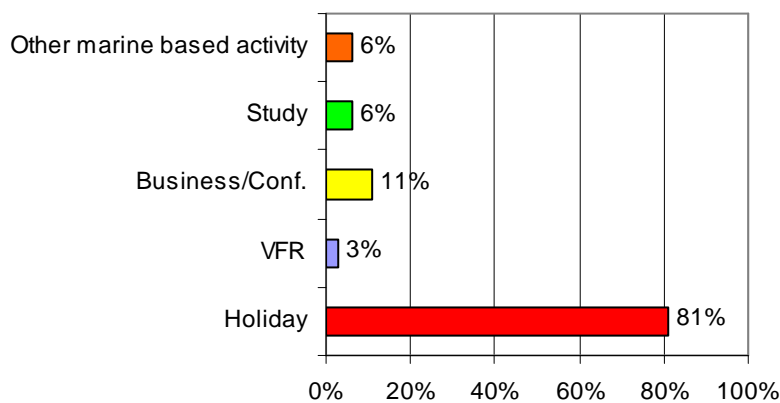
The water-based activities market appears to be segmented into two distinct sub-markets:

(i) 'the specialist user' who books in advance of their trip and comes specifically to engage in the particular water-based activity and

(ii) the 'casual tourist' or 'general holiday visitor' who hears about the various water-based activities available in the region upon arrival in Ireland or in the region. He/she may only decide to participate in the water-based recreation at the last minute. The results of the survey reflect the casual nature of water-based visitors, as finding and interviewing participants at each sample location was not guaranteed.

The 2004 WITHR study also examined reasons for visiting the West region. One quarter of overseas visitors surveyed came to the West of Ireland specifically to participate in water-based activities (the specialist user who books in advance of their trip and comes specifically to engage in the particular water-based activity). Of those respondents that did not specifically come for water-based activities, the reasons cited for visiting the West of Ireland are outlined in Figure 6.3. 81% of respondents came to Ireland to holiday, however, a significant proportion of these visitors participated in water recreational activities once they arrived into the West and learned about the wide range of water sport activities on offer to them. This further highlights the opportunistic market that water-based tourism attracts.

Figure 6.3: Reasons for Visiting the West of Ireland other than for water-based activities (Note: Multiple Response Answers).

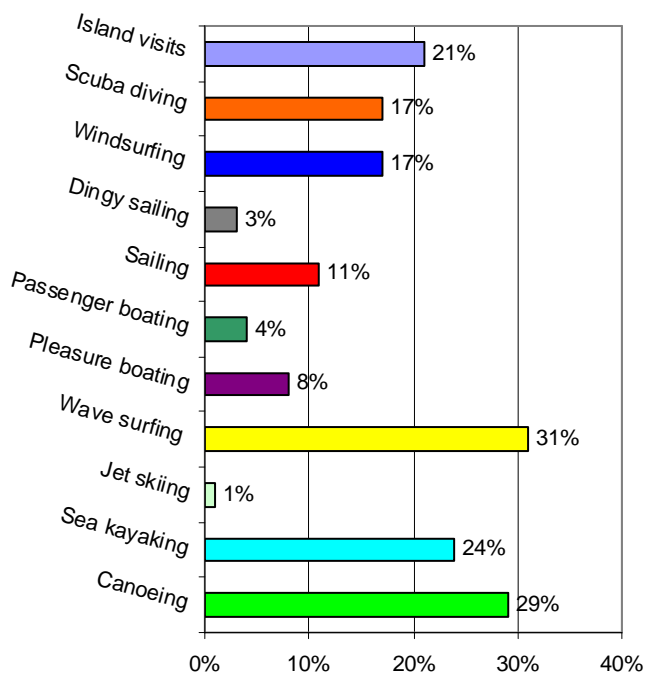


Source: WITHR, Water-Based Visitor Profile Study, 2004.

Figure 6.4 shows the estimated percentage of participants in each activity. Some respondents participated in more than one activity. The most common activity appears to be wave surfing with almost one third (31%) of respondents participating in this activity. The research highlights extensive natural resources available in the West for this very popular sport. As discussed in Chapter 4, the coastline along the West of Ireland boasts some of the best surfing conditions on the West coast of Europe which makes it a prime destination for this type of activity.

Canoeing is another popular water-sport with 29% of participants engaging in this activity. Almost one quarter (21%) of respondents paid a visit to an island off the West of Ireland during their trip and a further 12% engaged in passenger and pleasure boating. Jet skiing and dinghy sailing appear to be the least popular water-based activity amongst respondents.

Figure 6.4: Percentage of Respondents Participating in each Water Sport Activity



Source: WITHR, Water-Based Visitor Profile Study, 2004.

The expenditure profile of water-based visitors was also examined in the 2004 study. The following is an estimate based on the responses from a sample of 125 water-based visitors. The findings showed that the average number of overnights spent in Ireland by respondents was 14. Of these an average of 5.8 overnights were spent engaging in water based activities or at water sport locations. This equates to an average spend of €677 per visitor ($€116.74 \times 5.8 = €677$ see breakdown below) engaging in water based activities.

Breakdown of Expenditure for a Water-based Tourism Visitor:	
<i>Taking the average spend based on the information provided by respondents the general overall estimated spend per person per day was:</i>	
<i>Water-sport Activity</i>	<i>€32.48</i>
<i>Accommodation</i>	<i>€42.91</i>
<i>Food & Drink</i>	<i>€29.08</i>
<i>Other</i>	<i>€12.27</i>
TOTAL	€116.74 per day

Section 6.3 further examines the value of the marine tourism business sector (including operators and associates) specifically in the West of Ireland - their capabilities and performance and their overall contribution to the regional economy.

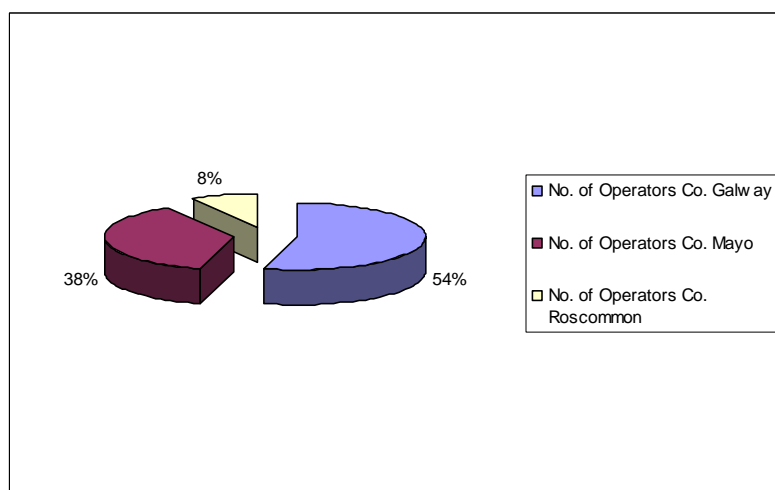
6.3 West Region Product Providers Evaluation

6.3.1 Marine Tourism Business Operators

From 2005-2007, fifty Marine Tourism Operators in the West of Ireland (i.e. 82% response rate of total sample) were surveyed and the findings are presented in section 6.3.1.1 - 6.3.1.4, including; marketing, customers and a financial analysis, and the business challenges of the marine tourism sector in the West of Ireland.

Table 5.1 in Chapter Five and Figure 6.5 illustrates the mix of marine tourism operators in Galway, Mayo and Roscommon. In 2006 there were 61 marine tourism operators in the region, with 54% in Galway, 38% in Mayo and 8% in Roscommon. In 2008, 67 businesses were recorded, representing a 10% increase in new marine tourism operators in less than two years. This demonstrates growth in the region and demand for water-based activities. (The complete database of marine tourism operators is available in Appendix 5 and this represents the entire marine tourism business sector in the West of Ireland recorded in 2008.)

Figure 6.5: Marine Tourism Operator Split – Galway versus Mayo versus Roscommon



Source: Ginty, 2006, Marine Tourism Operator Audit

Marine tourism businesses in the West of Ireland are typically family owner operated, generally small scale, highly seasonal and undercapitalised. These small tourism business characteristics are consistent with the small tourism business literature findings discussed in Chapter Two. The main seasonal issues that operators in the West Region said they are challenged with include climate conditions and overseas competition. The dominant influence on Ireland's climate is the Atlantic Ocean. With south-westerly winds from the Atlantic dominating, rainfall figures are highest in the northwest, west and southwest of the country, especially over the higher ground (Met Eireann, 2009). This impacts the range of water-based activities an operator can sell throughout the year and access to natural physical marine attractions such as beaches or coastal walkways. From the competitive perspective some operators said the cost of running the

business all year was not feasible due to high wage pressures, insurance costs, fuel costs, overseas competition and the cost of holidaying in Ireland was too expensive.

In the West of Ireland, Mayo is stronger in the breadth and quantity of water based activities it provides in the region. For example 50% of the operators providing a complete suite of water based activities including accommodation facilities are located in Mayo. Similarly boat charter and diving businesses equate to 60% each, and surfing operators at 66% approximately. Boat charter businesses are also strong in Mayo standing at a 60% share.

In County Galway 80% of the operators are island ferry businesses, 60% sea angling operators and inland cruising businesses equate to 75%. Galway and Mayo are equally strong in the provision of fresh water angling activities. Roscommon marine tourism operators mainly include fresh water angling businesses at 25%, a water theme visitor centre and a very successful full suite marine tourism operator who provides a range of activities on fresh water lakes and rivers.

From the business audit analysis, the regions' operator weaknesses lies in a lack of mammal watching tours and marinas available inland and coastal. It is also clear from the business audit and the marine tourism products evaluation (discussed in Chapter 4), the West of Ireland does not have the infrastructure to provide services for visiting cruise ships and various sailing vessels.

6.3.1.1 Marketing Profile

The marketing findings of the operator study include a product analysis, activity pricing, popular promotional tools and distribution methods, time management and regional communications.

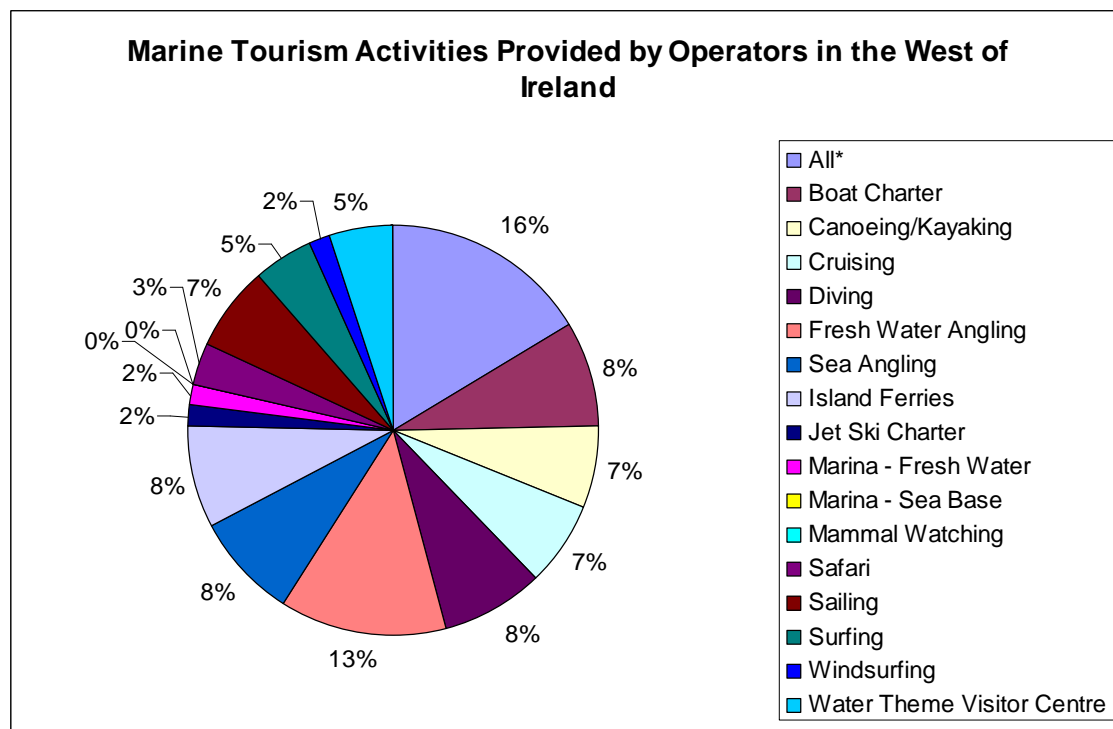
- **Product Analysis**

Table 5.1 in Chapter Five and Figure 6.6 illustrates the key marine tourism activity product categories provided by operators in the region. Twenty six marine related activities were identified in the analysis. The most popular water based activities offered by operators include surfing, canoeing/kayaking, sailing, windsurfing and nature appreciation. This equates to 40% of businesses in the region marketing and selling these range of activities.

Approximately 16% of marine tourism business operators interviewed in the region provide a full suite of the water-based adventure activities. These operators also offer accommodation as a core element of the main attraction or as an add-on to the business. This result could reflect attempts to enhance business viability and/or increase profitability by offering a range of product lines to achieve wider market appeal. These avenues of development may also be aimed at mitigating extreme patterns of business seasonality as discussed in Chapter Two (see Baum, 1998, Warren and Taylor, 1994). Operators providing a full suite of services believed the accommodation offering was essential to their business in order to cater for a wide range of customer groups throughout the year including school tours in the autumn and spring and also international summer camps and adventure tour groups.

At 21%, fresh water and sea angling is the second highest activity available by operators in the region. This is followed by island ferry businesses and diving operators, both at 8%. One operator provides the visitor with a ‘Safari’ experience in the west coast of Ireland including a nature tour, heritage, guided walks, island trips and workshops.

Figure 6.6:



Note: All* = Marine tourism operators providing a suite of water-based activities from canoeing, surfing, sailing, nature appreciation, instruction, accommodation etc.

Source: Ginty, 2006, *Marine Tourism Operator Audit*

Some operators expressed that there are many similarities between marine tourism offerings available in Ireland and New Zealand. In 1999, Higham and Dickey undertook a study which researched the activities offered and resources utilised by ecotourism businesses in New Zealand. The key marine related activities offered by ecotourism operators in New Zealand were scenic tours 29%, marine mammals 22%, sea kayaking and canoeing 25%, fishing 8%, diving 7% and sailing and skiing between 2-2.5% each. Also Newfoundland has a similar marine tourism product portfolio and like New Zealand, it recognises the value of its marine tourism offerings and the state has built policies and procedures around sustaining and developing the sector long term(see Appendix 2 case study).

This West Region marine tourism business study asked operators what are the most popular water-based activities they market and sell. The results varied for each operator, however a common listing emerged which represents the most popular water based activities undertaken by visitors in the region, includes;

- 1) Kayaking/Canoeing
- 2) Surfing
- 3) Sailing/ Boat Trips/ Island Visits by Ferry

- 4) Sea Angling
- 5) Coastal Walks/Hill-walking
- 6) Marine Educational Tours

Operators were also asked what type of new water based activities are emerging. Again there was quite a range of activities suggested and the following list represents a summary of the most popular activities put forward;

- 1) Kite Surfing
- 2) Hobie Cat Sailing
- 3) Ringo Rides
- 4) Wake Boarding
- 5) Coastal Camping Experiences
- 6) Raft Building
- 7) Dive Safari
- 8) Powerboating
- 9) Wave Boarding

In contrast the findings from a West of Ireland Inishbofin Island visitor survey (Ginty, 2007) conducted in May 2007 are outlined in Table 6.1 below. Trips to the islands are a passive 'paid' marine tourism activity, however, once visitors are on the island many engage in other water based activities including free and paid for marine tourism products. 47% take trips to the beaches on the island, with 25% swimming in the sea and 89% enjoy walking around the island. Two thirds of the activities available to visitors on Inishbofin island can be classified as marine tourism activities. The remaining third of the activities include eating and drinking, arts and crafts and listening to music.

Table 6.1: Activities engaged in by Visitors to Inishbofin Island

Activities	%	Activities	%
Guided Tour	7	Scuba Diving	8
Walking	89	Wind Surfing	3
Eating & Drinking	73	Sea Angling	7
Arts/Crafts	4	Trips to the Beaches	47
Listening to Irish Music	52	Ferry Trip	28
Swimming in Sea	25	A Picnic	23
Canoeing	3	Cycling	29
Sailing	4	An Island Event	21
Other	15		

Source: Ginty, 2007, Inishbofin Island Tourism Development Plan 07-10.

Note - multiple options chosen by respondents.

o Activity Pricing

A summary of the operators activity pricing is presented in Table 6.2. A typical daytripper spending time at a West of Ireland 'Adventure Centre' spends approximately €40 - €70 and an anglers average costs incurred in one day (not including accommodation) is €90. Marine tourists on average spend 3-4 days on a 'package experience' this can cost over €325 for a diving experience.

Table 6.2: Average Price of Water-based Activity by Operators in the West of Ireland

Operator Category	Most Popular Packages Sold	Average Price of Water Based Activity Package per person
Adventure Centre*	½ Day- 1 Day	€40 - €70
Adventure Centre*	3 Days	€180
Fresh Water Angling	1 Day	€90
Sea Angling	1 Day	€60-90
Scuba Diving	3 Days	€325
Sea Kakyng	1 Day	€90
Island Ferries	1 Day	€70 - €100
Water Theme Visitor Centre	1 Day Access	€5.50 - €9.
Power Boating Course	1 Day	€395
Inland Cruising	7 Days	€895

Source: Ginty, 2006, Marine Tourism Operator Study

*(Note * An Adventure Centre - Typically provides all major marine tourism activities i.e. surfing, wind surfing, canoeing, etc.)*

○ **Promotional Tools & Distribution Methods**

In 2006, 77% of marine tourism operators reported having a website and 33% having an online booking system in place. At the time there was little cross referencing of the sites. The most effective marketing tools used by operators in the region include;

- 1) Networking – Personal Contacts – Word of Mouth
- 2) Website/ Internet Marketng
- 3) Van/Vehicle Branding
- 4) School Briefings
- 5) Public Relations – Articles /Journalist Visits/ Site Reviews
- 6) Inhouse Database Management – Telemarketing
- 7) Placement of adverts in speciality magazines – national and international
- 8) Mailshots

Interestingly for some adventure centre operators in the West, advertising or placing articles in ‘Education Magazines’ and ‘Scouting or Girl Guide Associations’ have become effective for generating leads. In addition, targeting HR managers in organisations to book ‘corporate team building packages’ has proved effective. Some of the full suite operators reported successful multinationals book ‘corporate marine based adventure packages’ to help motivate employees and also to work on innovation and creative techniques. This type of business works well in the ‘low season’ and helps combat seasonality issues.

Over 61% of marine tourism operators in the region contribute funds to a group 'marketing fund', i.e., an association, an affiliation or state tourism agency. Typical funds range from the Fáilte Ireland West marketing fund to the Irish Sailing Association or PADI group. Marketing association contributions ranges from €150-€600 p/a depending on the business. The main benefits operators derive from such associations is a raised profile, marketing communication support, business ideas, trade show support and sales/lead generation.

○ **Sales and Marketing Time Management**

Aswell as the day to day running of the business such as accounts management and maintenance, over 80% of businesses surveyed take responsibility for selling and marketing their business. On average two days per week are dedicated to selling and marketing management.

○ **Regional Communications**

Marine tourism operators in the West of Ireland generally do not share information or network with each other on a regular basis. Approximately 50% of businesses surveyed don't share information with other operators. The 50% of businesses that do communicate, they refer customers to each other, share information on marine regulations or technical training tips or meet up to discuss developing the West into 'an adventure capital'.

From discussions with the operators there are generally two or three people who are the main driving forces behind the marine tourism development goals for the region. Some operators expressed a view that *"if there was a a marine tourism regional forum in place perhaps networking would improve"*. Fáilte Ireland have made efforts in 2008 to establish an 'adventure businesses network' in the West as a result of a strategic goal set for the region.

Only 50% of operators receive regular communications from state agencies and 16% have never received any information from a state tourism body. Agents who keep regular contact with 50% of the operators in the region include;

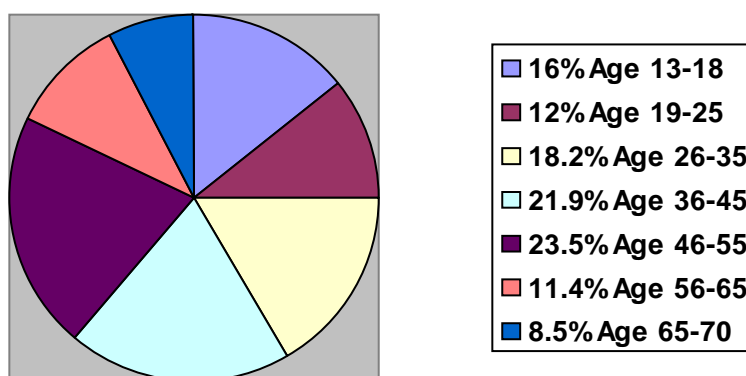
- ISA, (Irish Sailing Association)
- Irish Surfing Association
- Marine Department – mainly marine regulation notices for boats
- VEC and FAS
- Fáilte Ireland

6.3.1.2 Customer Profile

The operators' customer analysis findings include the age groups engaging in water based activities, their country of residence and product package preferences.

- **Customer Age Group**

Figure 6.7: Marine Tourism Operator's Customer Age Groups:



Source: Ginty, 2006.

According to the operators surveyed, 45% of their customers range from 36-55 years of age. Teenagers have a 16% share and the 19-25 age bracket is lower at just 12%. The 13-25 age groups represent major opportunities for growing the West marine tourism participation levels. The operators believe in order to encourage increased participation among these user groups, future investment is required in the coastal and inland waterways supporting infrastructure and facilities. In addition, marine appreciation and water-based activity education modules should be introduced at first and second level school. Improving access to the water can also encourage increased participation among this youth market.

In addition future sector research could investigate the needs, perceptions, buying behaviour and water based activity participation patterns of these age groups in the West of Ireland. This research would form a valuable source of knowledge in developing a sustainable sector going forward.

- **Customer Country of Origin**

Operators surveyed in 2006 said that half of their customer base were domestic visitors (53.3%), this signifies its importance in terms of a target market and presents many opportunities for extending the tourist season in the off peak months with 'school and education packages'. 24% of

customers were international visitors coming from the UK and only 7.3% they believed from the USA and Canada, Ireland's two main markets.

These findings can be compared with Figure 6.2 earlier (i.e. the 2004 water based visitor survey) where 11% of visitors surveyed came from the USA and 30% from Britain. According to the Fáilte Ireland 2006 annual visitor survey for the region, it recorded a decline in visitors numbers from the US in 2004 (353,000 visitors) to 2005 (316,000 visitors) and a slight increase in 2006 (352,000). The changes in US visitor numbers during this time period is partly due to currency fluctuations (Fáilte Ireland, 2007).

A further comparison is highlighted in Table 6.3 where visitors to the Island of Inishbofin on the West coast of Ireland were surveyed in May 2007 as part of a tourism development plan for the island. 'Trips to the islands' is a passive marine tourism activity and the findings from the Inishbofin study in 2007 illustrate the customer profile of the 'ferry operator' in the west region of Ireland. In contrast, almost three quarter of respondents to the Inishbofin visitor survey (74%) were domestic visitors.

Table 6.3: Inishbofin Island Visitors Country of Residence

Domestic Visitors	%	Overseas Visitors	%
Clare	5%	France	16%
Cork	2%	Germany	10%
Dublin	20%	Switzerland	5%
Dundalk	2%	UK	11%
Galway	36%	North America	37%
Kildare	2%	Northern Ireland	21%
Laois	9%	France	16%
Limerick	4%	Germany	10%
Mayo	5%	Switzerland	5%
Meath	2%		
Sligo	2%		
Tipperary	2%		
Westmeath	4%		
Wicklow	5%		

Source: Ginty & Murphy 2007, Inishbofin Island Tourism Development Plan 07-10.

○ **Walk in Day Trade versus Tour Packages**

Over 43% of marine tourism operators business is coming from day trade/walk in trade, Operators believe the most profitable business comes from the tour packages which can range from 2-10 days depending on the product offering. For example 'a marine tourism package' geared at overseas teenagers during the summer months typically lasts 10 days and includes a coastal camping experience. This type of package ranges from €650-€1000. Table 6.6 below highlights the walk in trade as compared to the tour package customer profile.

It is also important to note the opportunistic market that water-based tourism attracts. Typically a family on holiday for a week in the West of Ireland mid summer will avail of free marine tourism activities such as trips to the beach plus one day paid marine tourism activity offerings

such as canoeing/sea kayaking or surfing in the form of lessons or equipment hire (WITHRC, 2004). This highlights the potential to expand the range of day trip offerings available by operators.

Table 6.4: Walk in Trade versus Tour Package Customer Profile

Customer Type	Customer % split	Average Days	Average € Spend
Walk in trade	43.7%	1 day	€83.58
Tour Package Trade	61.3%	4 days	€346.67

Source: Ginty, 2006.

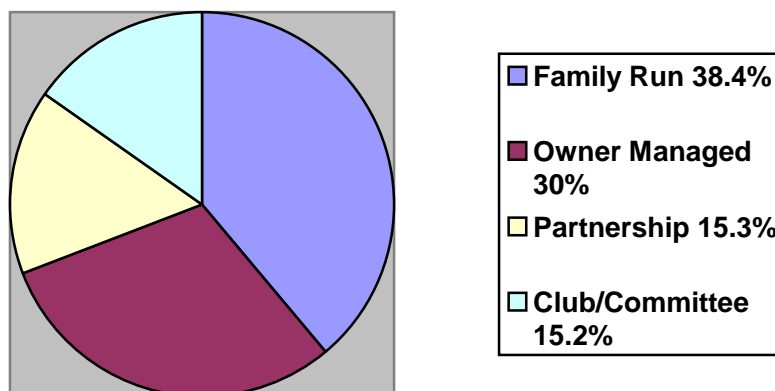
6.3.1.3 Financial Profile

The operators financial profile is examined under four key headings including; business ownership, business operational months, state support, business performance and expenses, and employment figures.

o Business Ownership

Over 68% of marine tourism operators in the region are family run or owner managed and a small percentage of businesses are managed through sailing or sea angling committees or clubs. This is consistent with the literature findings discussed in Chapter Two on small tourism businesses. Where family businesses overlaps in many ways with that pertaining to small businesses, but there are a number of key differentiating components namely: ownership and control of the enterprise; motives and goals; involvement of family members; family business interdependencies, and generational transfer (Getz and Carlsen, 2000). In some cases businesses have been set up as a sideline or hobby, usually by females (Kousis, 1989; Lynch, 1996; Oppermann, 1997). Another major goal is that of experiencing a desired lifestyle, and McKercher (1998) states that this applies to many nature tour operators.

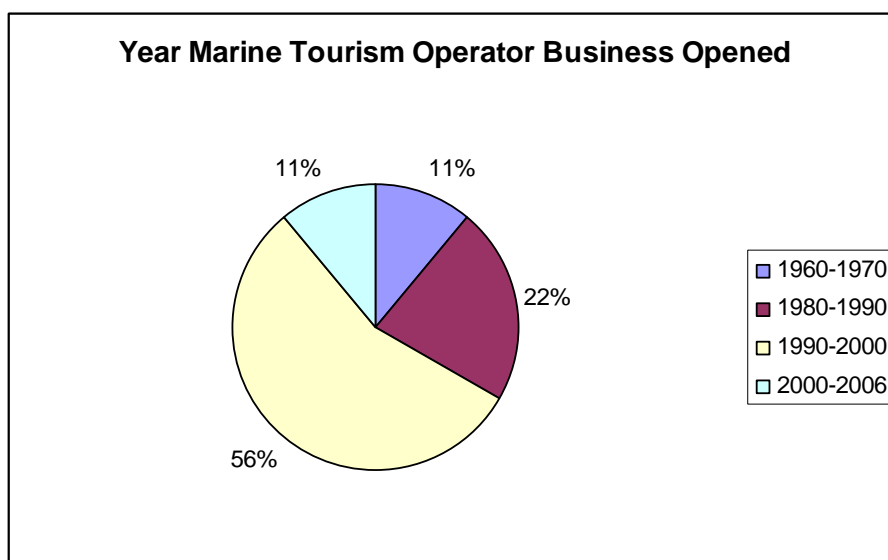
Figure 6.8: Marine Tourism Operators Category of Ownership



Source: Ginty, 2006.

Approximately 61.5% of marine tourism operators surveyed have other businesses. The other businesses include; other tourism businesses such as www.budgetski.ie, marine consulting, food businesses - a salmon 'smokehouse', insurance provider, boat mechanics or working for a county council part-time. Over 62% of these businesses rely on their second business to support their marine tourism business operations throughout the year. As discussed in Chapter Two, a recurring theme in tourism businesses is the idea that non-economic attributes including lifestyle values, motivations and aspirations are balanced with and sometimes take precedence over economic goals (Goulding, Baum and Morrison 2008). Getz and Carlson (2000) also state that setting up a tourism business by a family or individual is perceived as a tool to achieve a lifestyle aim, but it is also likely that some families and other owner operators have a lifelong interest which leads them into the variety of sectors in the tourism industry. Therefore it is reasonable to conclude that marine tourism operators main business goals is not purely financial related but more lifestyle driven. Therefore owning or working in a second business is motivated by the need to support and drive the 'lifestyle' marine tourism business and keep it running. It is also possibly a family driven initiative and therefore a need to support and keep the family business running for possibly the next generation.

Figure 6.9:



Source: Ginty, 2006.

According to the operator findings 56% of businesses were established in the 1990's and a further 22% in the 1980's. Finally the remaining marine tourism operators (22%) were set up between 1960-1980. This is reflective on Ireland's economic history and business development during these time periods. Growth in this sector can be attributed to factors such as membership of the EU, changing lifestyles and increase in incomes, government injections and investment, and the celtic tiger boom of the 1990's, which saw the marine tourism operator businesses double in size.

○ **Business Operational Months**

Marine tourism operators in the West of Ireland open for business on average 9.75 months of the year. In this study the seasons are defined as quarters by the respondents. The busiest season is summer time followed by autumn. Some businesses have been innovative in developing new products for the ‘off-season’ months, such as ‘school tours’ targeting the regional educational establishments.

As discussed in Chapter 2, Thyne and Laws makes the point that: *“As an endemic market phenomenon in many tourism destinations (Allcock, 1995; Butler, 2001), seasonality is commonly held to characterise sub-optimal utilisation of economic resources over a part of the year, to discourage inward investment in an area’s tourism superstructures, to limit operators’ propensity to upgrade their facilities and in certain cases can act as an impediment to labour force recruitment, retention and development (Krakover, 2000; Lundtorp, 2001) either in tourism or in other economic sectors competing with tourism such as agriculture (D’Amore, 1976)” (2005:210).*

○ **State Support**

Grants received by operators consisted of subsidies for educational programmes and funding towards the purchase of equipment or a boat. Feedback from the marine tourism operators indicates that there is no clear knowledge of what funding is available to the industry. Many operators expressed the view that *“the grant support system in Fáilte Ireland is time consuming and bureaucratic”*. Table 6.5 represents an example of funding received by marine tourism operators in the West since 2003.

Table 6.5: Examples of State Support Grants Received by Regional Marine Tourism Operators 2003-2006

2006		2005		2004		2003	
Grant Agency	€ Value	Grant Agency	€ Value	Grant Agency	€ Value	Grant Agency	€ Value
Fáilte Ireland	75,000	Galway Rural Development	14190	Leader	11000	Leader	40000
Dept. of Education	125,000	Galway Rural Development	22900	FAS	100000	Dept. of Marine	6200
		Dept. of Education	125,000	Dept. of Education	125,000	Dept. of Education	125,000
		Leader	13000			FAS	100000
		Leader	25000				
		Forfas	10000				
Total	200,000	Total	85,090	Total	111,000	Total	146,200

Source: Ginty, 2006.

Businesses surveyed expressed a lack of knowledge in relation to funding support and product development. This is due to the fact that there is no state support ‘one stop shop’ specifically catering for the marine tourism sector in Ireland. According to a Fitzpatrick’s Associates economic report in 2008, the total investment in tourism in the West of Ireland in 2006 was €163.5m, this

represents 9% of the national capital investment in tourism (€1,798.1m). It is estimated only €1.124m (.7%) was invested in water based tourism enterprises or activities, where Mayo received 81% share of the funds, Galway 15% and Roscommon just 4%. Funding and policy decisions related to the Marine Tourism Sector in West Region are discussed further in Chapter 7.

o **Business Performance and Expenses**

Turnover & Employment

The West Region survey findings estimated total combined turnover in 2006 for 61 marine tourism operators to be €24,270,000. It is estimated that 82% of marine tourism operators in the West of Ireland achieve a turnover under €500,000 with 7% of this group earning less than €5K. Approximately 394 people are employed full-time by marine tourism operators in the region and a further 295 people are employed part-time.

Table 6.6: Marine Tourism Operators (MTO) Turnover Analysis 2006

MTO Business Type Category	% Split	Average Turnover Range €	Average Number of Businesses	Average MTO's Total Turnover Share
Small	7%	> 5,000	4	20,000
Small	57%	100,000 - 150,000	35	5,250,000
Medium	18%	350,000 - 500,000	11	5,500,000
Medium	10%	750,000 - 1,000,000	6	6,000,000
Large	8%	1m - 1.5m	5	7,500,000.00

Source: Ginty, Operator Analysis, 2008.

Turnover & Employees Correlation:

Operators were asked to indicate their turnover in 2006 and the number of people they employed full-time and part-time (see operator survey question 34 and 36 in Appendix 3). The findings from both these variables were then correlated in order to identify the impact the turnover had on the level of employment. According to Cohen, Manion and Morrison (2007) the coefficient of correlation tells us something about the relationship between two variables. Low or zero values indicate weak relationships, while those nearer to +1 or -1 suggest stronger relationships. The marine tourism operator survey findings showed a high correlation coefficient between turnover and full time employees at **.944**. For example;

- An Adventure Centre with a turnover of €1.2m employs 12 people full-time.
- A Diving Centre with a turnover of €280,000 employs 4 people full-time.
- An Angling Business with a turnover of €66,000 employs 2 people full-time.
- A Ferry Business with a turnover of €2,000,000 employs 20 people full-time.

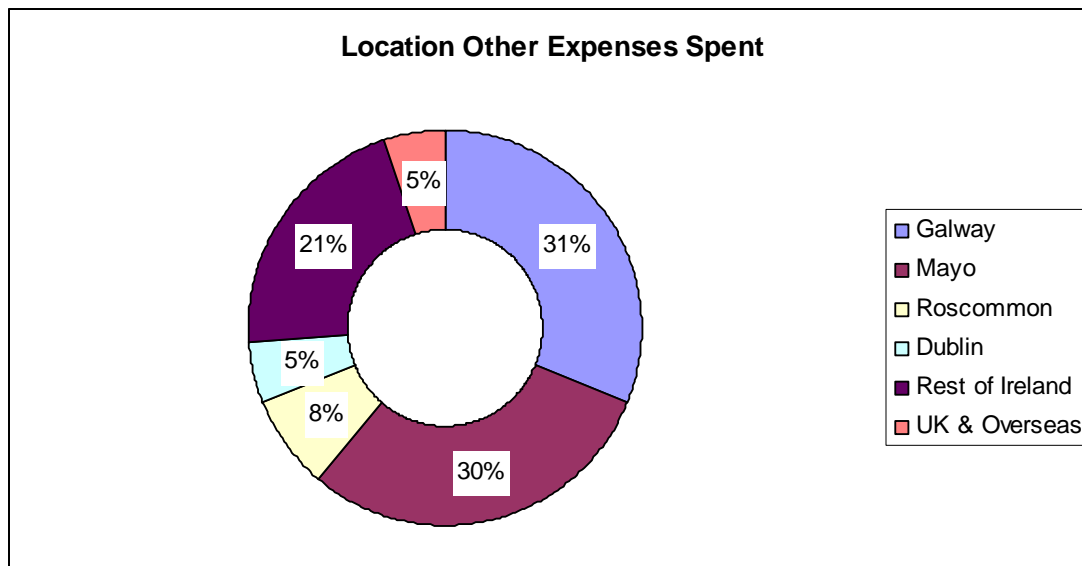
Expenses

In 2006, businesses were asked to indicate the total value of their expenses, their top five expenses and the suppliers location of each of the top five expenses (see operator survey question 34 and 35 in Appendix 3). The findings showed that the top expense was wages with an average of 41% of turnover (€9,950,700.) allocated to paying wages. The balance of 58% (€14,076,600.) of turnover is allocated to other business expenditures such as goods and services

which includes high rated expenses ranked by operators such as: insurance, fuel, equipment and transport.

It is estimated that €14,076,600. was spent on other business expenditures such as goods and services and Figure 6.11 highlights where this income was spent. In 2006, approximately 69% of marine tourism operator expenditure on 'other items such as goods and services' were spent in the region (Galway, Mayo and Roscommon) this equates to €9,712,854.

Figure 6.10:



Source: Ginty, Operator Analysis, 2008.

6.3.1.4 Challenges Facing the Regional Operator and the Marine Tourism Sector

Operators were asked to indicate whether they had plans to expand their business, the main operational problems they face and the challenges facing the marine tourism sector. Operators were provided with a series statements to select and they were asked to state their top three challenges and provide further comments on their experiences (see operator survey question 38-42 in Appendix 3).

Over 53% of operators interviewed in 2006 would like to expand their business. However, there are a number of challenges the businesses face in order to achieve their business goals. A range of challenges have been recorded in the data findings. After close analysis a common set of categories have emerged that link to specific problems or issues the businesses face.

The main operational problems/issues facing marine tourism businesses in the West of Ireland (2006):

Category	Problems / Issues
Suppliers	<ul style="list-style-type: none"> - High cost of fuel - High cost of equipment - High SME insurance costs – unfair system for tourism enterprises - High cost of utilities
Marketing	<ul style="list-style-type: none"> - Limited time to focus on business planning - Limited marketing/promotion spend, - Slower growth in domestic demand
Labour	<ul style="list-style-type: none"> - High cost of labour - Cannot get adequately trained people - Staff retention problems.
Technology	<ul style="list-style-type: none"> - No broadband in the area.
Regulations	<ul style="list-style-type: none"> - Gill netting - Dept. of Marine regulations

The 2006 operator survey found that the top five challenges confronting the Marine Tourism Sector in the West of Ireland are as follows:

Category	Problems / Issues
1. Marketing	<ul style="list-style-type: none"> - Marketing the West as a ‘Marine Tourism/Adventure Destination of Excellence’ - High price levels in Ireland - Poor state support communication
2. Access	<ul style="list-style-type: none"> - Access to development support grants and the lack of marina’s and a network - Access to the water - Access – poor rural road network - Angling product supply - Signage
3. Competition	<ul style="list-style-type: none"> - Gaps in the provision - Climate - Overseas marine tourism destinations
4. Legislation	<ul style="list-style-type: none"> - Bureaucracy in state tourism agencies - Signage - Labour cost inflationary pressures. - Licensing
5. Perceptions	<ul style="list-style-type: none"> - Atlantic Ocean perception “cold and dark” - Tourist perceptions

The top three support services marine tourism businesses are interested in receiving include:

1. A 'one stop shop' – a product manager/dedicated business unit group for marine tourism in Ireland to receive marketing advice, co-ordination of promotional opportunities, funding, development and investment in products and marine infrastructure in the area, research and government regulations.
2. Networking Opportunities.
3. Business Review/Planning Advice.

The business challenge findings from this study are consistent with the issues and challenges of small tourism businesses discussed in Chapter Two. For example Price in 2007 examined out of a list of eleven options, the greatest barriers to the successful development of tourism businesses in the West and North West of Ireland. The greatest constraints included tourist access, length of the season, marketing, sign posting and insurance.

The interview process and surveys with various marine tourism operators in 2006 also provided an opportunity for businesses to provide further comments on their 'business needs'.

A sample of comments are categorised and outlined in Table 6.7 below.

Table 6.7: Marine Tourism Operator Business Issues - Needs

Business Issues Needs Category	Comments
Marketing	<ul style="list-style-type: none"> • <i>“Position the 'West' as the adventure capital of the Northern Hemisphere just as Queenstown in New Zealand is known as the adventure capital of the southern hemisphere”</i> - A Full Suite Marine Tourism Operator • <i>“Lots of state agents writing reports and no one is taking the lead with Marine Tourism. Worst offenders Galway Co. Co. in relation to 'access to the water'. We need to show the benefits of clustering - marketing area as a whole e.g. Dingle, Queenstown.”</i> - Sea Angling Operator • <i>“There is an element of fleecing tourists - no pricing regulations in place for the island”</i> - Canoeing/Kayaking Operator • <i>“Market facts - UK divers undertake 100,000 dives per year and 75,000 take place outside Britain. Ireland receives only a small percentage of the 75,000 dives”</i> - Fresh Water Angling Operator. • <i>“One state agent/body needs to take the lead on marine tourism including marketing, product development and investment”.</i> - A Full Suite Marine Tourism Operator • <i>Fàilte Ireland need to classify marine tourism into one product</i>

	<p><i>grouping... currently only a product group for angling and marketing linked to this. This needs to be addressed and incorporate the complete marine tourism portfolio”.</i></p> <p>- Surfing Operator</p> <ul style="list-style-type: none"> • <i>“Ireland West not delivering on marine tourism value to the media... it's not just about alcohol related festivals that promotional messages need to be geared around but take into message 'Active West' marine brand encompassing a whole range of activities that position it strongly against the New Zealand 'natural' and Australian 'outdoor' brand personality”.</i> <p>- Sailing Operator</p> <ul style="list-style-type: none"> • <i>“In future the Ireland West message at shows overseas should incorporate an 'Active West Water' brand. There is no formal regular communication from Ireland west, marine institute or an event for marine tourism business providers - there is no knowledge sharing or forum to communicate details - we were not informed or invited to participate in the national marine strategy plan released in 2006”. - A Full Suite Marine Tourism Operator</i> <ul style="list-style-type: none"> • <i>“Quality product is what we win out on with the overseas competition”. - Cruising Operator</i>
<p>Licensing/Regulations</p>	<ul style="list-style-type: none"> • <i>“Tropical dive locations are cheaper than Ireland and licensing regulations are too tough on passengers - in '05 a diving operator was forced to sell a boat due to this”. - Diving Operator</i> • <i>“Gill netting of Pike is a major problem in West of Ireland and will impact the industry. EU anglers are boycotting Ireland and countries that are gill netting for Pike. A few years ago a Pike Review Group was set up, a report commissioned by Central Fisheries Board – it's sitting on a desk in Government and no action has been taken to date”.</i> <p>- Fresh Water Angling Operator</p> <ul style="list-style-type: none"> • <i>“Traditionally sea angling has been the domain of the average earner. Due to the unwarranted stringency of the 2002 passenger boat regulations it can now only be enjoyed by the elite and higher earner”. - Sea Angling Operator</i> • <i>“In the 90's £3m spent on tourism angling measure on the Corrib this type of initiative needs to be happening regularly. Actions needed: 1) I would like the government to buy out drift-netting 2) Market Research - there is a lack of primary data from fisheries”.</i> <p>- Fresh Water Angling Operator</p>
<p>Environmental Protection</p>	<ul style="list-style-type: none"> • <i>“There are only two sites left in Europe for Wild Brown Trout (sporting fish) fishing in the West of Ireland in Lough Corrib and Lough Mass. Protection needs to be a priority”.</i> <p>- Fresh Water Angling Operator</p>

	<ul style="list-style-type: none"> • <i>“Environmental issues with the water - tourists were poisoned on the island last year.” – Diving Operator</i>
Product Development/ Infrastructure Development	<ul style="list-style-type: none"> • <i>“Fáilte Ireland's (FI) grant procedures are too bureaucratic and time consuming. Fáilte Ireland is not getting constructive criticism because people/businesses are afraid they won't get a grant”. - A Full Suite Marine Tourism Operator</i> • <i>“Fáilte Ireland is responsible for promoting the angling product. If you are responsible for promoting a product you should also take responsibility for the protection, investment and development of the product.” – Fresh Water Angling Operator</i> • <i>Some islands need marine tourism support facilities... they have poor shelter/no safety signs/ public toilets, changing or no information centres”. - Canoeing/Kayaking Operator</i> • <i>“Government agents recognise the importance of the inland waterways. State ownership of tourism slows down entrepreneurship and development”. – Cruising Operator</i> • <i>“Waterways Ireland is impossible to deal with”. - A Full Suite Marine Tourism Operator</i>
Competition	<ul style="list-style-type: none"> • <i>“In 2000, we were making €100,000 a year and running an all year business. Now we operate from May to September only, due to VEC centre competition (Westport Area)”. - Windsurfing Operator</i>
Education	<ul style="list-style-type: none"> • <i>“The student graduates from Sligo IT in outdoor tourism courses are not equipped practically to work in an activity centre - too academic focused and not enough practical experience e.g. can't judge the weather conditions etc.” - A Full Suite Marine Tourism Operator</i> • <i>“Issues with the islands include the need for an education programme for service providers on island re. tourism management”. – Ferry Operator</i>
Health & Safety	<ul style="list-style-type: none"> • <i>“There are lots of barriers to running a business on Islands - infrastructure and funding. The pier at Inis Mann was upgraded in 1995 but we can't leave our dive boat unattended for more than 1 hour - as it's very dangerous. There has been a drowning incident. It's classed now as an exposed off shore pier and rated high risk. As a result our boat is only insured from May 1st to Sept 30th “. - Diving Operator</i> • <i>“Access to the water is a major problem in the region”. - Ferry Operator</i>

Source: Ginty, 2006 & 2007 Operator Interviews

These comments have been communicated to the Marine Institute and Fáilte Ireland West in 2006 and 2007 and interestingly, the new 2008-2012 regional development plan focuses on

strategies linked to ‘developing the West as an outdoor adventure centre of excellence’. Time will tell if they are aspirational statements or actual policies with investment behind them. Another important output from this research study has involved the creation of an educational programme called the ‘Ocean Adventure Schools Programme’ (www.letsdoitschools.com) aimed at primary and secondary school pupils and teachers throughout Ireland. This educational programme is linked to the Volvo Ocean Race 2008-2009. It is a legacy initiative that aims to increase interest and participation in marine leisure activities among the Irish youth going forward. Further details on this schools programme will be discussed in Chapter 8 under ‘Study Outcomes’.

6.3.2 Marine Tourism Business Associates Evaluation

Marine tourism associate businesses in the West of Ireland are also typically family owner operated, generally small scale seasonal enterprises, located in retail areas close to the sea or the inland waterways. A database of associate businesses was established in 2007 and this can be found in Appendix 6. In 2007, there were 23 marine tourism associate businesses identified in the region, with 73% (17) in Galway, 22% (5) in Mayo and 4% (1) in Roscommon. In total, 15 marine tourism associates participated in this research study.

Marine tourism associate businesses in the region typically sell a range of marine leisure equipment such as; boats, fishing rods or tackle, surfing boards, sailing equipment, marine related machinery, marine engineering services or other marine related items. There are a number of ‘general sports’ shops in the region e.g. that sell water-based equipment or gear as well as soccer, athletics and GAA gear. Therefore they are not included in this study as they have not been identified as a pure marine associate specialist provider.

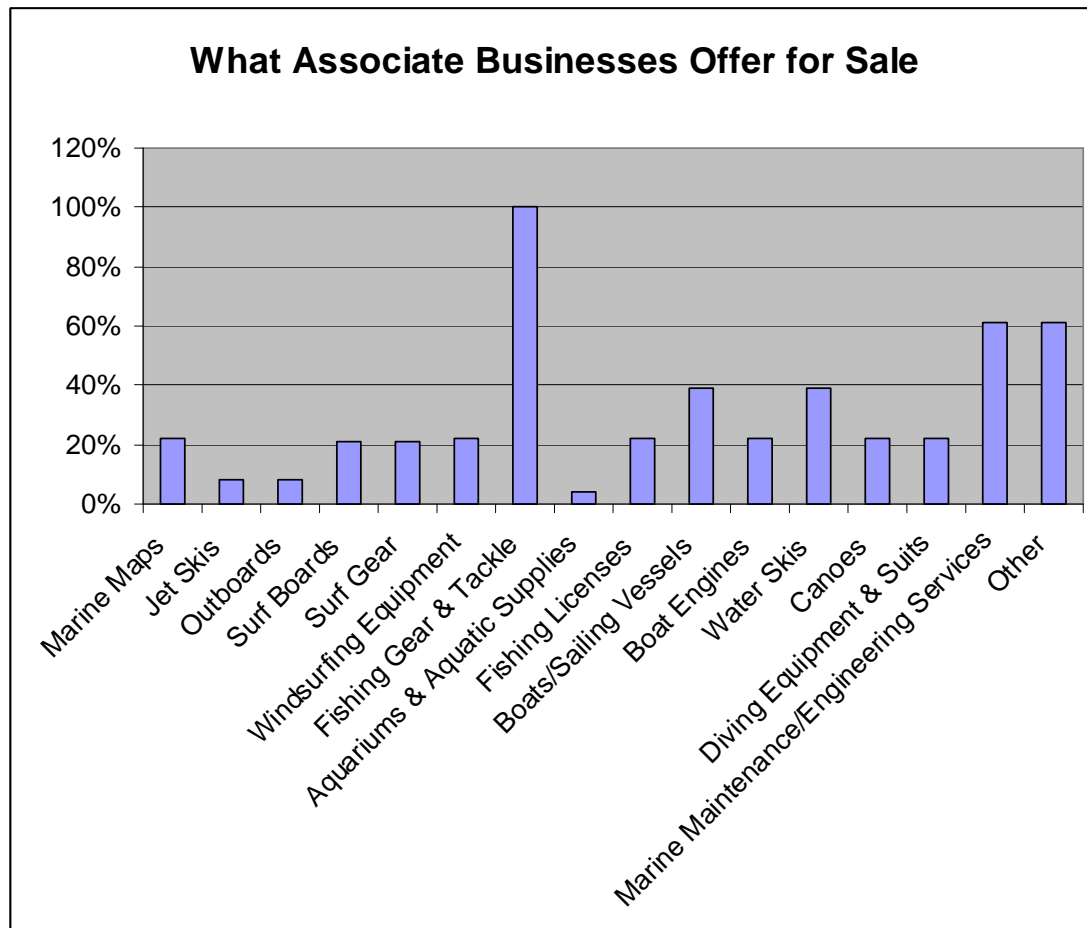
6.3.2.1 Marketing Profile

The marketing findings of the associate study include a product analysis, popular promotional tools, time management and regional communications.

- **Product Analysis**

Figure 6.11 illustrates the key marine product categories sold by associate businesses in the region. Approximately nineteen products were identified in the analysis. The most popular products sold by associate businesses in the region include fishing gear and tackle (100% of associate businesses in the region), marine maintenance and engineering services (60%), chandlery (60%), marine electronics (60%) and boats/selling vessels (40%).

Figure 6.11:



Source: Ginty, 2007, *Associate Business Analysis, West of Ireland*.

Note: 'Other' includes Marine Electronics, Commercial Fishing Equipment, Chandlery/Ropes, and Boat Trailers.

This study also asked associate businesses what were the most popular products they market and sell. The results varied for each associate, however a common listing emerged which represents the most popular products purchased by their customers in the region:

- 1) Fishing Supplies - Lures, Rods and Reels, Flys
- 2) Marine Safety Equipment - Life Jackets etc.
- 3) Boat and Engine Maintenances - Marine Hardware & Paint
- 4) Marine Electronics
- 5) Boats & Sailing Vessels - 17ft/19ft Lake Boats, Evinrude Outboards, Boat Trailers
- 6) Boat Chandlery - Marine Charts/Maps, Ropes, Equipment

Associate businesses were also asked have they introduced new products to their business over the years. A more recent product offering is guns for sporting and hunting purposes. Some associates expressed the hunting product group has proved popular and has brought in a new set of customers into the shops. This demonstrates a move away from marine related offerings as the demand is not there.

Marine associate businesses recognise they face new competition online where direct marine product stores are emerging and offering cost effective deals. An example of an online associate business is www.marineparts.ie.

- **Popular Promotional Tools**

38% of marine tourism associate businesses in the region have a company website. The remaining 62% have an online business listing on *Golden Pages* or other search engine providers. Only two businesses offer an online shop facility. These findings indicate a lack of internet engagement among associates, knowledge on how to get online and the business benefits that can be achieved from an online presence. Also the lack of broadband services in the area impacts their decisions.

The most effective sales and marketing tools used by associate businesses in the region include;

- 1) Networking, Personal Contacts and Word of Mouth
- 2) Advertisements in Irish Skipper, Associations, Local Gealtacht Radio, Local Connemara Views Paper, Golden Pages, Mayo News, Advertiser Paper, Irish Anglers Digest
- 3) Web Links, for example www.apolloduck.ie, www.buyandsell.com, www.goldenpages.ie, fishing gear business search engines and Irish Marine Association web links.
- 4) Sponsoring Sea Events
- 5) Providing boats at a discount price as a prize at fishing clubs/competitions.

Over 40% of businesses in the region contribute to a group/association marketing fund for example the 'Western Fisheries Board' or 'Destination Westport'. Benefits include joint marketing campaigns and news announcements communicated on a regular basis.

- **Sales and Marketing Time Management**

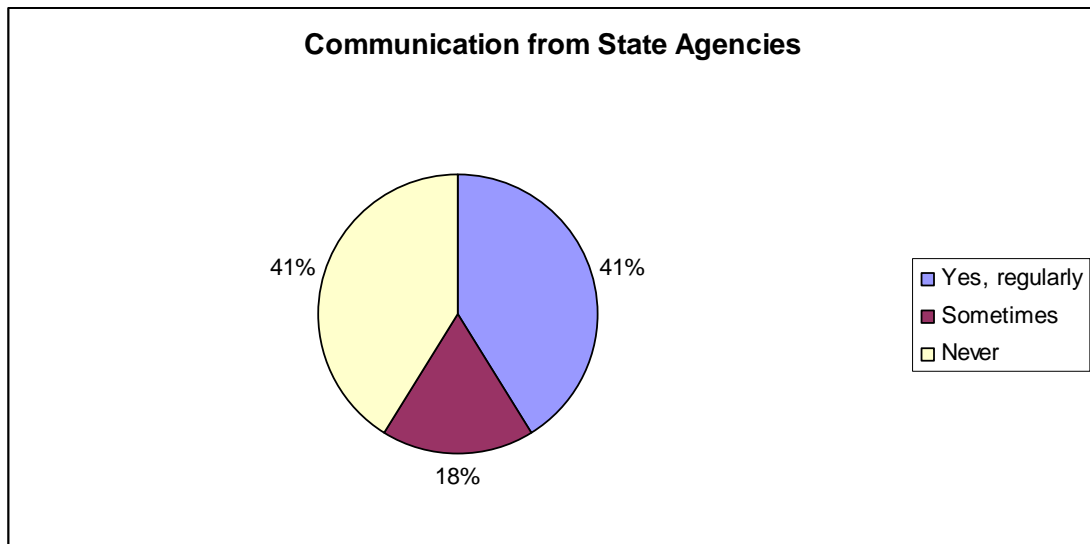
Similar to the operator findings nearly all businesses surveyed take responsibility for selling and marketing their business in addition to managing other roles with the business. On average the associate businesses shops open Monday to Saturday from 9-5pm.

- **Regional Communications**

Marine tourism associate businesses generally don't share information or network with each other on a regular basis. Those that do communicate with each other (10-20% of businesses) share information on boats for sale, or customers requiring certain marine products. Over 20% of associate businesses said they refer customers to marine tourism activity operators in the region, however there is no commission system in place for such referrals.

Approximately 41% of associate businesses receive regular communication from state agencies including notices from the Department of Transport or marine relating to legislation on marine standards, the Fisheries Board and the Safety Council once a year.

Figure 6.12:



Source: Ginty, 2007, Associate Business Analysis, West of Ireland.

6.3.2.2 Customer Profile

The associate customer analysis findings include a listing of the different types of customers that purchase marine supplies in the region, includes;

- 1) Local Marine Users
- 2) Marine Tourists
- 3) Anglers
- 4) Fishing Clubs
- 5) Boaters/Sailors
- 6) Sailing Clubs
- 7) State Agencies
- 8) Commercial Fishermen/ Ferry Businesses
- 9) Regional Marine Tourism Operator Businesses

Just 8% of associate businesses are selling to marine tourism activity operators in the region and are generating from €5,000 - €20,000 per year in revenues. This finding represents a very low business linkage between the two groups and indicates a number of issues such as a lack of networking amongst the sector and a leader/support group which could help drive and direct the economic linkages and the sectors long term growth.

6.3.2.3 Financial Profile

The associate financial profile is examined under four key headings including; business ownership, business operational months, state support, business performance and expenses, and employment figures. The findings from this section of the study are weak, due to the fact that businesses were unwilling to reveal financial figures related to their business. As a result, it was not possible to gauge the multiplier for the associate businesses in the region and prepare an economic assessment. However, the findings in this section do provide some examples of business performance and expenses for marine associate businesses in the region.

- **Business Ownership**

Similar to the operator findings and the small tourism business literature discussed in Chapter Two, approximately 80% of businesses are family run and 20% owner managed, with businesses being established from 1976 to 2004. Only 8% of businesses have other enterprises. The other businesses include a framing operation or food business. These businesses rely on their second business to support their marine associate business throughout the year.

- **Business Operational Months**

Marine associate businesses in the West of Ireland open for business on average 11 months of the year. The busiest season is Summer time followed by spring and then autumn.

- **State Support**

No grants or state investment has been received by marine associate businesses from 2003 – 2006.

- **Business Performance and Expenses**

In 2007, the associate businesses were interviewed on their business performance in 2006 and they were also asked to indicate their expenses for the year. Associate businesses were very reluctant to share any financial data for this study. As a result a compromise was reached where businesses were categorised as small, medium or large linked to a turnover range and also an expenses range was selected by the respondents. Table 6.8 highlights the findings.

Table 6.8: Marine Tourism Associate Businesses Turnover, Expenses & Employment Guide 2007

Business Type Category	% Split	Guide Turnover Range €	Guide Expenses Range €	Average No. of Businesses	Employment Ft-full time Pt-part time
Small	22%	€5,000-10,000	€1,000-2,500	5	1 pt
Medium	26%	€50,000-100,000	€10,000-50,000	6	1 ft 1 pt
Medium	43.5%	€100,000-250,000	€50,000-100,000	10	2ft 1 pt
Large	8.5%	€500,000 plus	€150,000-250,000 plus	2	4ft 2pt

Source: Ginty, 2007, Associate Interviews.

Top expenses incurred by associate businesses which rose considerably during the boom years (pre 2008) and impacts their competitiveness include: wages, fuel, electricity, stock, equipment, insurance, renting facilities and storage costs.

From interviews and analysis the majority of expenses incurred is supplied by companies within the region and approximately a quarter of revenues earned is spent on suppliers mainly from Dublin, Cork and overseas.

6.3.2.4 Challenges Facing the Associates and the Sector

The challenges facing the associate businesses, share similarities with the marine tourism operators. A range of challenges have been recorded in the data findings. After close analysis a common set of categories have emerged that link to specific problems or issues the businesses face.

The main operational problems/issues facing marine tourism associate businesses in the West of Ireland in 2006:

Category	Problems / Issues
1. Suppliers	<ul style="list-style-type: none"> - High cost of equipment - High SME insurance costs - High cost of utilities - Cost of leasing facilities
2. Marketing	<ul style="list-style-type: none"> - Limited time to focus on business planning - Limited marketing/promotion spend,

3. Labour	- High cost of labour
4. Technology	- No broadband in the area.
5. Regulations	- Licensing

According to associate businesses, the main challenges confronting the marine tourism sector in the region are:

Category	Problems / Issues
1. Marketing & Product Development	<ul style="list-style-type: none"> - Marketing the West as a 'Marine Tourism/Adventure Destination of Excellence' - High price levels in Ireland - Poor state support communication - Lack of a marina network on the West coast
2. Access	<ul style="list-style-type: none"> - Access to development support grants and the lack of marina's and a network - Access to the water and supporting water sports infrastructure - Access – poor rural road network - Angling product supply - Signage
3. Competition	<ul style="list-style-type: none"> - Gaps in the provision - Climate - Overseas marine tourism destinations
4. Legislation & State Agents	<ul style="list-style-type: none"> - Marine legislation reform i.e. Foreshore Act - Access to development and support grants - Signage - Labour cost inflationary pressures - Licensing
5. Perceptions	<ul style="list-style-type: none"> - Atlantic Ocean perception "<i>cold and dark</i>" - Tourist perceptions

The interview process and surveys with various marine tourism associate businesses in 2007 also provided an opportunity for businesses to provide further comments on their business needs. A sample of comments are categorised and outlined in Table 6.9.

Table 6.9: Marine Tourism Associate Business Issues - Needs

Business Issues Needs Category	Comments
Marketing	<ul style="list-style-type: none"> • <i>“The marine industry in the West of Ireland is much underestimated and with the right support and development, Ireland could be more active in the Marine Industry worldwide.”</i> – Marine Associate Business
Licensing/Regulations	<ul style="list-style-type: none"> • <i>“Fishing regulations impacting tourism”</i> – Marine Associate Business
Environmental Protection	<ul style="list-style-type: none"> • <i>“The Perch issue is impacting the marine sector”</i> – Marine Associate Business
Product Development/ Infrastructure Development	<ul style="list-style-type: none"> • <i>“A fishing facilities infrastructure investment plan is required in for the West”.</i> – Marine Associate Business • <i>“The declining commercial and recreational fishing industries – an action plan supported by investment needs to be put in place to drive and direct traditional fishing enterprises in to tourism providers”.</i> – Marine Associate Business
Competition	<ul style="list-style-type: none"> • <i>“Access to the Water and the lack of a Marina Network is impacting the competitiveness of our marine tourism product”.</i> – Marine Associate Business • <i>“High cost for tourists impacting competitiveness”.</i> – Marine Associate Business • <i>“High price levels and rates for small businesses are impacting competitiveness”.</i> – Marine Associate Business • <i>“High cost to go fishing in Ireland”.</i> – Marine Associate Business

6.4.3 Summary Operator and Associates Evaluation

Operators and associates share a number of business characteristics which are typical of small businesses discussed in Chapter Two. They are both small scale enterprises, mainly family owner operated and face a number of similar challenges throughout the year including: length of the season; marketing and financial support; cost of running the business; lack of investment in marine tourism infrastructure; regulations; tourist access to the water; and perceptions of the Atlantic. The weather conditions and seasonal issues impact the operators as they trade for 9.75 months of the year on average, whereas associates are open for business 11 months of the year on average. This is mainly due to the fact associates operate from a shop/retail unit and they offer a diverse product range to combat seasonal issues. For example, associates also sell equipment for the hunting market and they serve local customers in the area for various items or marine related maintenance requirements for their boats, angling or surfing hobbies throughout the year.

Operators have a range of water-based products they sell (26 activities) and package. Some operators have accommodation which assists the business when targeting large groups/ school tours throughout the year. The pricing is structured as a daily rate (€40-70 per day) or as a fixed term package. A key differentiation between the operator and the associate businesses is that the operators are selling services, which are perishable and operate in the same way as an unsold hotel room or seat on an aeroplane. If the activity is not sold that day, that revenue opportunity is lost. In the case of the associates they are selling mainly tangible products, they hold a lot of stock/equipment in their shops all year round, which can be sold at any stage throughout the year .

Over 61% of operator businesses stated they had other businesses whereas only 8% of the associate businesses have other enterprises. 62% of the operators rely on their second business to support their marine tourism operator business. Having a second business helps combat seasonal issues and deal with the loss of revenue from unsold days/services throughout the year. Associates do not experience this problem as much as the operators, which explains why they open 11 months of the year on average and why running a second business is not a requirement in order to stay in business.

Both business groups expressed concerns over the lack of communications between sector members and State agencies. The operators tend to pay into a regional Fáilte Ireland marketing promotion budget. However, this marketing budget is not specific to the marine tourism business sector and generally goes into a pool of funds that markets 'tourism' overall in the region. It is difficult for businesses to measure the business return or the overall impact of this contribution.

The operators seem to be more technology savvy than the associates with 77% of operators online and just 38% of associates having a web presence. The lack of an online presence impacts

the development of a formalised online network of the marine tourism business sector in the West. For example a sea angling business and a local associate shop selling tackle and boat equipment would benefit if they promoted packages jointly online.

In relation to performance approximately 57% of operators achieve an annual turnover from €100,000 - €150,000 per year. Similarly over 43% of associates achieve an annual turnover from €100,000 - €250,000. With the top expenses of business groups being wages, insurance, fuel, equipment and transport.

Finally, just 8% of associate businesses are selling to marine tourism operators in the region and are generating from €5,000 - €20,000 per year in revenues. There is also evidence of little or no customer referrals between the two business groups. This is an interesting finding and demonstrates the lack of economic linkages between the marine tourism sector business groups. This low business linkage indicates a number of issues such as a lack of networking amongst the sector and the lack of a leader or support group which could help drive and improve the economic linkages between the marine tourism sector businesses long term.

6.3.4 Economic Impact Assessment of Marine Tourism Operators in the West of Ireland.

This analysis provides an estimate of the economic impact of marine tourism operators in the West of Ireland. This assessment can be seen as representing the local 'value added' of marine tourism. The methodology used here is broadly based on the standard Keynesian multiplier approach discussed in Chapter 2 and basic input-output regional modelling techniques (see Moloney, 2008, Appendix 13 and IRIOS regional input-output software, 2006). The key to this approach is it takes into account 'knock-on' effects on the local economy beyond the initial expenditures of the marine tourism operator businesses. Knock on effects can be seen as the trickle-down of wealth beyond the incomes of those directly involved in the sector. Multiplier models are based on multiple rounds of spending. Each round of spending represents an increase in income in the economy. The first round of spending is made up of the direct economic impacts of the marine tourism business sector. The knock on effects makes up the subsequent rounds of spending. The total economic impact, or total increase in income, is the total of all the rounds of spending.

Figure 6.13: Total Economic Impact



The Direct Impact:

The direct monetary injection of the marine tourism operator businesses consists of the spending by participants on water based activities, which is estimated to be €24,270,000 in 2006 (taking into account 61 operators). However, the impact on the local economy is not felt until such an injection is transformed into wealth, and this increases as a result of the following actions:

- Marine tourism operators draw salaries and pay the wages of those working in the sector (see Table 6.10 estimated at €9,950,700).
- Marine tourism operators purchase equipment and investment goods as a result of their water based activity and support incomes. A proportion of this expenditure stays in the local economy (see Table 6.10 estimated at €14,076,600).

This represents the direct impact/first round of spending which adds to local incomes. The above increases in wealth have been calculated using the surveys of the marine tourism operators. The sample businesses were asked to estimate their total annual spending on including salaries/wages and goods and services. The totals from the sample have been aggregated to estimate the spending by all operators in the area (see Table 6.10).

Marine tourist 'other expenditure' estimates, as discussed in section 6.2 is also highlighted in Table 6.10. Marine tourist 'other expenditure' in the West of Ireland was estimated as follows:

Accommodation	€42.91
Food & Drink	€29.08
Other	€12.27
Total	€84.26 per day

In 2006, 1,021,000 (see Chapter 4) overseas holidaymakers spent time in the West of Ireland (Fáilte Ireland, 2007) and based on the findings from the WITHR 2004 study discussed in section 6.3, it can be estimated that approximately one quarter of visitors (255,250) engaged in marine tourism activities. The WITHR 2004 research study has also shown that the general visitor surveyed spends an average of 5.8 out of their total 14 overnights in Ireland engaging in water sport activities or at water-sport locations. Therefore the 'other expenditures' by marine tourists can be estimated at €488.70 per visitor to the West. The total 'other expenditure' equates to €124,740,675 (= €488.70 X 255,250 visitors).

Table 6.10: Economic Assessment Estimates of Marine Tourism Operators in the West Region 2006

	Marine Tourism Operator Businesses
Salary/Wages Expenditure Estimates	€9,950,700.
Goods and Services Expenditure Estimates	€14,076,600.
TOTAL Direct Impact	€24,270,000.
Note: *Other Overseas 'Holiday Makers' Estimated Marine Tourist Expenditures	€124,740,675.

*Note: *West of Ireland 'Other non-activity indirect marine tourist expenditure' includes accommodation, food, drink, and other and it is estimated that one quarter of overseas visitors come to the West of Ireland to pursue marine tourism related activities (WITHR, 2004).*

Table 6.11: The Economic Impact of Marine Tourism Operator Businesses in the West Region in 2006

	Multipliers	WEST OF IRELAND
Direct Impact	1	€24,270,000.
Indirect Impact	0.30	€ 7,281,000.
Induced Income	0.18	€ 4,368,600.
TOTAL ECONOMIC IMPACT		€ 35,919,600.
Income Multiplier	1.48	<i>For every €1 spent directly by 'marine tourists' in the region approximately €0.48 was generated by secondary effects in the region</i>
Direct Impact on Employment		<i>In the region 10 jobs are supported for every €1 million spent.</i>
Employment Multiplier	1.4¹	<i>For every 1 job directly employed by a marine tourism business in the West of Ireland there is also .4 jobs indirectly supported.</i>

Note: The Multipliers methodology are based in IRIOS regional input-out software 2006, utilising Dr. Moloney, UCC, West of Ireland Regional Multiplier Methods and Assessments 2006 and 2008. The findings in Table 6.11 have been verified by Dr. Richard Moloney from UCC and detailed notes are provided in Appendix 13.

Indirect Impact:

As discussed in Chapter Two the indirect impact occurs when the marine tourism operator suppliers are in receipt of expenditure, and they in turn purchase goods and services. This in turn results in further production and employment in businesses located in the country or region. The indirect impact equates to €7,281,000.

Induced Impact:

The induced impact refers to the additional consumer spending, which takes place when the income generated from the direct and indirect impacts is spent. The induced spending of €4,368,600 can be seen as the proportion of the direct income increase that is spent in the West of Ireland economy. To estimate this initial income it is discounted to get a figure for disposable income (income after taxation). Then it is estimated how much of this disposable income re-enters the local economy (see the appendices for Input-Output Methodology equation notes).

Leakages:

At each round of spending the subsequent increases in output and income becomes smaller as money is 'leaked' from the local area economy. There are four sources of such leakages:

¹ The multipliers were originally calculated at constant prices. So the number of jobs per million are given in constant prices. The number of jobs per million would be less in given inflation and hence employment multipliers were adjusted accordingly. This has been verified by Economist, Dr. Moloney, UCC.

- Income transfer is reduced by direct and indirect taxes.
- A proportion of spending on wages and/or goods and services takes place outside the local economy.
- Local employees save a proportion of their salaries.
- A proportion of spending by local employees is on goods produced outside the local economy.

In any economic impact assessment the overall impact is dependant on the size of the initial input and the significance of the leakages.

The outputs from Table 6.11 include; the total indirect income of €7,281,000 and total induced income of €4,386,600 as a result of the initial direct injection of €24,270,000. All together they amount to €35,919,600 which equals the total impact of marine tourism operators in the West of Ireland in 2006. As a result the multipliers equate to Direct 1, Indirect 0.30 and Induced 0.18 which results in an overall multiplier of 1.48 for marine tourism operator businesses in the West of Ireland. Typically multipliers at a regional level range between 1.4 – 1.6 (Moloney, 2008, see Appendix 13), due to the initial tourism spending in the local area, however this revenue injection into the region reduces for each round, due to spending on goods and services which results in leakages out of the region. Generally one quarter of the money earned by the tourism businesses leaks outside the region and abroad. In contrast, national multipliers in Ireland range from 1.8 – 1.9 and are calculated using a national input output table. These findings are reported by a number of economists (see Deegan, Kenneally, Moloney, O’Sullivan and Wanhill, 2008)

An income multiplier of 1.48 for the marine tourism operators demonstrates that for every €1 spent directly by ‘marine tourists’ in the region a further €0.48 was generated by secondary effects in the region. These findings correlate with the Deegan and Moloney Ireland West Tourism Economic Report 2006, which demonstrated the total output multipliers for the region vary between 1.49 and 1.56. This means that for every €1 spent directly by tourists in the region between €0.49 and €0.55 was generated by secondary effects in the region. Overall, if all expenditure, direct and secondary, is taken into account approximately 10 jobs are supported by every €1 million spent.

6.4 Seaside Town Case Study: Business Performance in a West of Ireland Regional Coastal Village, Roundstone, Co. Galway

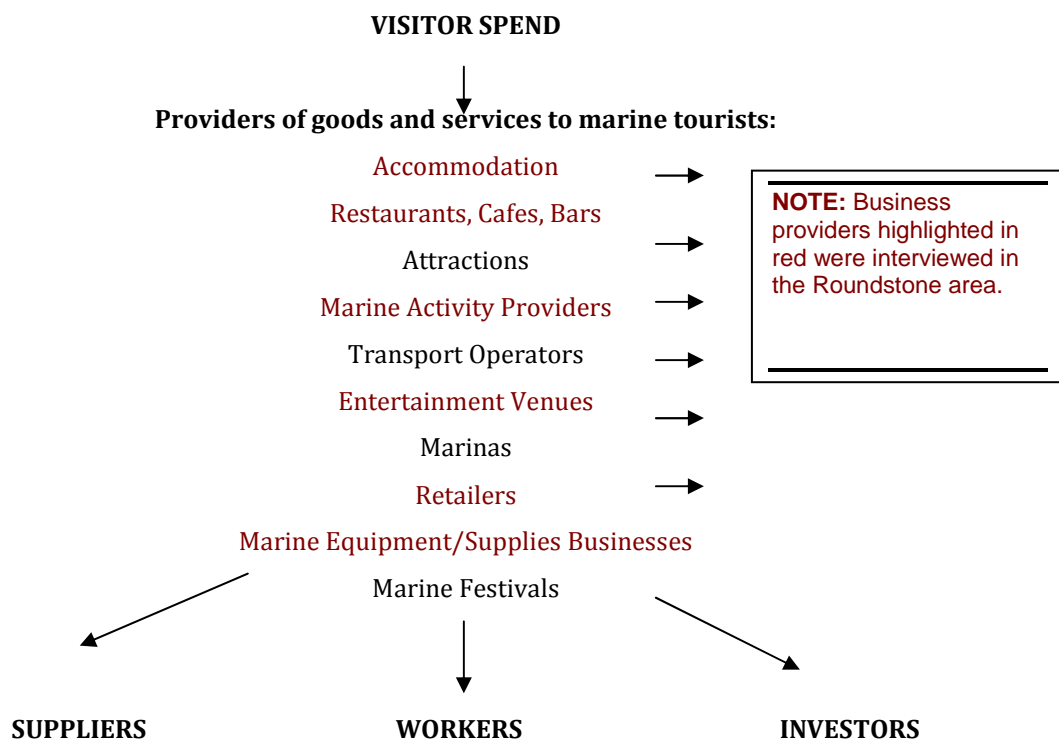
This case study evaluates the performance of businesses in Roundstone, a seaside coastal village in the West of Ireland. Roundstone seaside village was selected due to a number of factors. The village is situated on the coast with a Harbour and a beach called 'Dogs Bay', which is adjacent to fifteen seaside businesses including shops, restaurants and hotels all reachable within a one mile area. It is a magnet for day-trippers, residents and holiday makers and is therefore very dependent on tourism.

For business residents in Roundstone "the beach is a local leisure resource, a regular and routine element of their daily life's". For holiday makers, it is a special experience, but one often repeated with tourists who return to the same location year on year (Tunstall and Penning, 1998).

6.4.1 The Roundstone Business Sample and Research Methodology

An entire sample of fifteen seaside business owners in Roundstone were interviewed in 2006 and early 2007. The Roundstone business community consist of a series of communities with differing business provisions ranging from local grocery shops, gift shops, hotels, caravan park, bars and restaurants as highlighted in Figure 6.14. The complete business listing is available in Appendix 14.

Figure 6.14: Flow of Visitor Spending Through Local/Regional Economies



Source: Adopted from META 2002 and modified Ginty, 2007.

In addition to the fifteen local seaside businesses in the area, there is a healthy crafts industry including a ceramics business and 'Roundstone Musical Instruments' that exports worldwide and employs 15 people from the area. Both businesses are located in the IDA Park in Roundstone.

Each business was interviewed to determine the direct business benefits from free marine tourism resources in the area such as Gurteen or Dogs Bay in Roundstone. The entire sample of fifteen seaside business owners in Roundstone were interviewed in 2006 and early 2007. The purpose of this study was to understand the business operations of the providers in relation to income, employment, suppliers, expenses, business challenges, attitudes to tourism in the area, and what benefits gained from free marine tourism activities are being retained within the local community. Section 6.4.2 to 6.4.12 presents the main findings from this research study.

6.4.2 About the Location

The village of Roundstone lies on the western arm of Bertraghboy bay in Connemara, Co. Galway, 48 miles (77km) north-west of Galway city. The village is beautifully set along a spectacular coastal drive overlooking the Atlantic at the foot of Errisbeg Mountain. The population of Roundstone in the 2002 census was 424 persons, 225 males and 199 females. During the summer period from June – August the population increases to 3,000 (Roundstone Beaches Environmental Project 2006).

The village was founded in the mid 1820's by the celebrated Scottish engineer Alexander Nimmo who, as engineer for the Western District, built houses, roads and harbours throughout the West of Ireland. It was then settled by Scottish fishing people. In 1835 a Franciscan Monastery was established in Roundstone and by the 1840's 75 houses had been built and the village supported an active fishing industry and a population of some 400 people. The village derives its name from the Irish *Cloch Na Ron* or *Rock of the Seals*. The vicinity is rich in points of historical, geological and scenic interest. The remains of numerous early Christian settlements have been found on the islands along this coast.

Roundstone is a popular holiday resort renowned among artists and naturalists for the remarkable beauty of the surrounding mountains and seascapes. In Roundstone there is a harbour where local fishermen return with lobster, crab, shrimp, mackerel or cod. The town itself boasts a good selection of bars and seafood restaurants and some fantastic craft shops and cafés.

6.4.3 Roundstone Tourism

The main tourist attractions in the area are Gurteen and Dogs Bay Beaches. Dogs Bay beach lies two miles south-west of the village and like Roundstone its name is a corruption of the Irish *Port na bhFeidŪg* or Bay of Plovers. Here winds and tide have piled up dunes of fine white sand between the mainland and a small island half a mile off-shore. Two beautiful beaches lie below these dunes, one facing south-east, the other north-west overlooking Gurteen Bay. These stunning beaches give the same world class first impression as the famous Frazer Island inland beaches in Australia.

The area also offers a number of other marine related tourism pursuits such as climbing the hills along the coast, scenic walks, marine heritage, sea angling and lake fishing and painting. There are two hotels in the region along with a number of B&B's. The Connemara Golf Course is approximately 6 miles from the village and Roundstone Bog also attracts a significant number of geologists to the area.

6.4.4 Employment

The main occupation and employment in the area is tourism and to a lesser degree fishing and farming. There is also an IDA park in the village which houses an electronic factory, a pottery and craft industry, a bodhran maker, craft shop and jewellery maker, all of whom give employment to local people living in the region. A furniture factory also provides local employment along with the construction industry. The harbour in the village is the landmark of Roundstone and is used for a small amount of fishing activity.

6.4.5 Education, Accommodation and Transport

There is one National School and one parent and toddler group in the area. A mobile play bus, provided by the Galway City and County Childcare Committee, provides a preschool service in Roundstone two days per week. There is also an Adult Education Programme in place giving classes in Computers, Art and Irish.

Roundstone has a wide range of accommodation available for the potential visitor, Caravan Parks, Bed and Breakfasts, Self-Catering, 2, 3 and 4 star hotels.

According to the businesses, transport facilities are inadequate. In winter, there is a state bus service (provided by CIE), three times a week, and while in the summer period there is a daily service operating. There is one hackney service in the Roundstone area.

6.4.6 Roundstone Resources

A resource audit was undertaken through observation, one to one interviews with local business owners in the area and consultation with the Roundstone Beaches Environmental Project Group. Table 6.12 highlights the results from the Roundstone tourism resource audit. The results are categorised under key headings.

Table 6.12: Roundstone Tourism Resource Audit

RESOURCE CATEGORIES	KEY FINDINGS
Infrastructure Projects:	Investment Fund Value:
Heritage Council – Beach Boardwalk Infrastructure Project (2006 & 2007 Fund awarded). To improve access to the beach.	€48,000
Children’s Playground – beside the harbour	€70,000 – recently completed in 2007
People Resources:	Amount/Members:
Winter Population	424 (2002 Census) +/-50
Summer Population	3,000
Roundstone Marina Committee – Development Council	6 members
Roundstone Beaches Environmental Project	3 members
Roundstone Lotto Committee	5 members
Events:	Timing:
Arts Week	June-July
Summer Fest Weekend	August
Roundstone Regatta	July
Tour De Bog	August
Connemara Pony Show	July
Easter Egg Hunt	April
Roundstone Traditional Irish Nights	Wednesday Evenings - July & August Community Centre
Accommodation:	Numbers:
Hotels	2
B&B	2
Caravan Park	1
Holiday Homes	Numerous – issue in the area
Transport	Frequency:
CIE Service	Winter 3 times p/w, daily in the Summer
Taxi/Hackney Service	1
'Free' Tourism Products:	Status:
Beaches	2
Swimming in the Sea	Access to both beaches – However water sports are banned for safety reasons.
Coastal /Beach Walks	By Road or Beach
Bird Watching	Yes
Adventure water-sports are banned in the beach areas due to the nature and design of the beach for safety reasons e.g. kitesurfing, jet skiing etc.	
'Paid For' Tourism Products:	Status:

Lake Fishing / Sea Angling	Lake fishing supplies by John Stanley in Clifden. One Sea Angling business in Roundstone
Bike Hire & Tours	Connemara Safari Tours visits the area regularly in Summer season.
Other Businesses:	Numbers:
Bars, Restaurants & Coffee Shop	5
Clothes/Gifts/Furniture/Antique Shops	5
Craft Industry	2 businesses in IDA centre
Grocery	2
Petrol	1
Post Office	1
Other Intangible Resources	Status
Branding	Regional Ireland West Brand
Hospitality	Numerous Fáilte Ireland, Bridgestown and Georgina Campbell Accreditations
Tourism Experience	Lots to see and do as outlined above.
Marketing Programmes	Events such as Summer Regatta, Arts Week etc.
Unique Characteristics... why go to Roundstone...	Beautiful beaches, good seafood restaurants and bars, picturesque, relaxing.

Source: Ginty, 2007.

6.4.7 Roundstone Businesses Findings:

- **Year Opened:**

The longest running business in Roundstone is O'Dowd's Seafood Bar and Restaurant, which was set-up in 1907. The remaining businesses were set-up in the 1960's 1980, 1990 and 2001.

- **Business Categories and Performance:**

The research findings indicated three main categories of seaside businesses in Roundstone according to turnover; small, medium and large. The medium to large sized organisations achieved a turnover ranging from €100,000 to €850,000 and employed 3-6 people full-time all year. This increased to 15-17 part-time during the summer period from June to September. Small seaside businesses in Roundstone on average achieved a turnover ranging from €25,000 to €80,000, employed one person full-time and one person part-time during the summer period. Most small businesses close during the winter season and only open on bank holiday weekends. Businesses that close during the winter season said they use the time to travel, relax or paint.

Figure 6.15: Business Categories & Performance

	Small	Medium	Large
% Split of Businesses	53%	26%	21%
Average Turnover	€35,000	€300,000	€800K
FT Staff Summer	1	4	15
PT Staff Summer	0-1	6	3
FT Staff Winter	Bank Hols open only remainder Close Down	1	6
PT Staff Winter	As above	1	1
July/August Month Performance	15,000	€75,000	€170,000
Nov/Feb Month Performance	€0-500	€18,000	€35,000
July/August Summers Day Performance	€5K	€2,500	€4,000
Nov/Feb Winters Day Performance	€500	€600.	€500.
Other Businesses	Yes	Yes	No
Other Business Type	Artist - exhibits nationwide/ Sea Angling	Consultancy	
Dependency on Other Business	No	'Cash Flow' occasionally and paid back to 2 nd business at a later date.	N/A

Source: Ginty, 2007.

○ **Business Suppliers and Employment Impact:**

Supplies to the Roundstone seaside businesses are mainly coming from Galway City and Clifden. This means that revenues are being retained within the West Region. Roundstone businesses top expenses include fuel and staff and their major concern is the cost of rental accommodation in the area which ranges from €800 to €1,200 per week. This is a result of the impact of the holiday home rental market.

Figure 6.16: Business Categories & Suppliers Source

	Small	Medium	Large
% Split of Businesses	53%	26%	21%
Average Turnover	€35,000	€300,000	€800,000
Supplier Source	Roundstone, Mayo, Westport, Galway City, Belfast City, Oughterard, Clifden, Tipperary	Galway City, Clifden, Dublin, Mayo, Roundstone	Galway City, Clifden, Dublin, Mayo, Roundstone, Donegal

Source: Ginty, 2007.

The small business group in Roundstone face similar business operational challenges to the operators and associates discussed earlier in this Chapter. The top expenses recorded in 2006 include: heating fuel and electricity; phone rates; insurance, commercial rent; maintenance; and food supplies. Businesses also expressed what type of support they need in order to grow and develop their small businesses long term. There was a variety of suggestions including: more visitors through marketing campaigns; increase the population through 'incentive schemes'; set up an affordable housing scheme to support enterprise development and year long population of the area; provide access to broadband so that all businesses can set up an online presence; rejuvenate the harbour area and develop a marina which would drive more visitors into the area and provide employment to local people; all holiday homes should pay a local residential tax to combat seasonal needs in the area during the off peak season; extend the tourism season through devising new product packages and events in the area; invest in off season tourism activities; and develop a year long entertainment calendar for the area.

6.4.8 SWOT Analysis

Figure 6.17 presents a SWOT analysis, which provides a summary of the strengths, weaknesses, opportunities and threats facing the West Region coastal village, Roundstone, Co, Galway. This figure also highlights the challenges and opportunities facing the local businesses operating in the area.

Figure 6.17: Roundstone, Coastal Village, SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • High amenity, scenic area • Clean environment and unpolluted waters • Safe beaches • Good accommodation, food, entertainment facilities • Good amenity facilities, such as a Caravan Park and the new children's playground completed in 2007. • Annual Arts Festival, Regatta and Art Gallery • Active and established Development Council • Accessible Community Hall • Active community office used by local groups, (i.e. elderly, the youth,) • Indigenous industry in the area, pottery, electronics and bodhran making 	<ul style="list-style-type: none"> • Poor accessibility and isolation • Falling local population • Poor infrastructure, roads, sewerage, water • Lack of affordable community transport, particularly for the youth of the area • Lack of employment for young people in the area • High cost of sites and housing if people choose to stay in the region • Lack of amenities. • Winter facilities for visitors • The harbour is not cleaned up to act as an amenity • Weak infrastructure - lighting, roads, water etc. • No Marina Facility
Threats	Opportunities
<ul style="list-style-type: none"> • Risk of over development and unsympathetic buildings • Building for development increases prices for local people who want to build • Over abundance of holiday homes • Price of property leading to depopulation • Environmental; threats, pollution, rubbish, raw sewerage. 	<p>Lobbying for Future Projects</p> <ul style="list-style-type: none"> • Improvements to Inishnee Road • Repair Old Quay at Ervallah Harbour • Board Walk in Gurteen Beach • Playing Field • Development of the Roundstone Marina <p>Managing Existing Projects:</p> <ul style="list-style-type: none"> • Area Signage • Beach Access Boardwalk • Website • Twinning • Street Lighting • Sign Board • Waste & Recycling

Source: Roundstone Resource Audit Interviews 2007 and the Roundstone Development Plan 2005.

6.4.9 Top Issue for Roundstone Businesses

○ Housing

Housing in the area has become a major issue due to the popularity of the Roundstone area. There are a lot of holiday home developments that have been built in the village and on the outskirts and as a result rental accommodation in the area ranges from €800 to €1200 per week based on 2006-2007 rental rates.

There is an imbalance between the need for local housing and the cost of sites and planning area. Planning permission is also very difficult to attain, seeming to favour development clusters of houses together. The majority of these houses are used for the holiday season and left idle for the remainder and are not contributing, in a meaningful way to the local economy. This is a serious issue for the people of Roundstone. In 2006, sites in the area were reported to be very expensive (range in value from €250,000 per half acre, depending on the proximity to the sea) and priced similar to land available in the Galway city area. This makes it difficult for young local people to purchase a house and to make a decent living in the area. The businesses believe this is driving the young locals out of the village and therefore decreasing the population in the area.

6.5 Chapter Summary

This Chapter reports for the first time, on the capabilities, performance and contribution of the marine tourism business sector to the West of Ireland's regional economy. This research study is the first of its kind in Ireland and contributes to the general understanding of the social and economic impact of marine tourism businesses in a region as well as the linkages between the marine tourism businesses and Government agents in Ireland.

It appears that the water-based activities market is segmented into two distinct sub-markets: (i) *'the specialist user'* who books in advance of their trip and comes specifically to engage in the particular water-based activity and (ii) the *'casual tourist'* who hears about the various water-based activities available in the region upon arrival in Ireland or in the region. He/she may only decide to participate in the water-based recreation at the last minute. The results of the visitor profile study reflect the casual nature of water-based visitors, as finding and interviewing participants at each sample location was not guaranteed.

The 2004 study also examined reasons for visiting the West region. One quarter of overseas visitors surveyed came to the West of Ireland specifically to participate in water-based activities (the specialist user who books in advance of their trip and comes specifically to engage in the particular water-based activity). The research has shown that the general visitor surveyed spends an average of 5.8 out of their total 14 overnights in Ireland engaging in water sport activities or at water-sport locations. This equates to the average spend per visitor of €677 during participation in the water-based activity.

Marine tourism businesses in the West of Ireland are typically family owned and operated, generally small scale, highly seasonal and undercapitalised. The business characteristic findings from this study are consistent with the small tourism businesses literature discussed in Chapter 2. In the West the marine tourism businesses consist of mainly operators who sell marine tourism activity or adventure packages to domestic and international marine tourists. There is also associate businesses connected with the sector that sell marine equipment such as; fishing rods or tackle, chandlery, surfing boards, sailing equipment etc. to the operators, boat owners, state agents, locals or tourists.

During the study period in 2006, there were 61 marine tourism operators recorded in the region, with 54% in Galway, 38% in Mayo and 8% in Roscommon. In 2007, there were 23 marine tourism associate businesses identified in the region, with 73% (17) in Galway, 22% (5) in Mayo and 4% (1) in Roscommon. In relation to the operators Mayo is stronger in the breadth and quantity of water based activities it provides in the region. For example 50% of the operators providing a complete suite of water based activities including accommodation facilities are located in Mayo. Similarly boat charter and diving businesses equate to 60% each, and surfing operators at 66% approximately. Twenty six marine related products/activities were identified

in the analysis. The most popular water based activities offered by operators include surfing, canoeing/kayaking, sailing, windsurfing and nature appreciation. This equates to 40% of businesses in the region marketing and selling these range of activities. The new types of water-based products emerging include; Wake Boarding, Hobie Cat Sailing, Coastal Camping Experiences and Kite Surfing. A typical daytripper spending time in a region 'Adventure Centre' (16% of businesses in the West) spends approximately €40 - €70, and an anglers average costs incurred in one day (not including accommodation) is €90. Marine tourists on average spend 3-4 days on a 'package experience' this can cost over €325 for a diving experience.

From the marketing and promotional analysis, 77% of marine tourism operators have a website and 33% have an online booking system in place. The operators believe the most effective marketing tools are networking and word of mouth, the website, school briefings, and public relations where they invite journalists to spend time at their centre or a day with a water-based coach/guide. Over 80% of operators surveyed take responsibility for selling and marketing their business in addition to managing other roles within the business. With regards business communication, only 50% of operators communicate with other operators in the region where they refer customers to each other or share information on marine regulations or technical training tips.

Over 45% of operators customers range from 36-55 years of age. Teenagers have a 16% share and the 19-25 age bracket is lower at just 12%. The 13-25 age groups represent major opportunities for growing the West marine tourism sector. Over half of the operators customer base is domestic visitors (53.3%), this signifies its importance in terms of a target market and presents many opportunities for extending the tourist season in the off peak months with 'school and education packages'. The operators believe in order to encourage increased participation among these user groups, future investment is required for coastal and inland waterways supporting infrastructure and facilities, and water-based activity and appreciation educational programmes that are introduced at first and second level schools.

Over 43% of the marine tourism operators business is coming from day trade/walk in trade. Typically a family on holiday for a week in the West of Ireland mid summer will avail of 'free' marine tourism activities such as trips to the beach plus one day 'paid' marine tourism activity offerings such as canoeing/sea kayaking or surfing in the form of lessons or equipment hire. However, operators believe the most profitable business comes from the tour packages which can range from 2-10 days depending on the product offering.

Interestingly, 61.5% of marine tourism operators surveyed have other businesses such as other holiday companies, food companies or marine consulting services. Over 62% of these businesses rely on their second business to support their marine tourism business operations throughout the year. Marine tourism operators open for business on average 9.75 months of the year. The busiest season is summer time followed by Autumn. With regards business development and state investment, operators feedback indicated that there is no clear knowledge of what funding

is available to the industry and many operators expressed the view that *“the grant support system in Fáilte Ireland is time consuming and bureaucratic”*.

According to a Fitzpatrick's Associates economic report in 2008, the total investment in tourism in the West of Ireland in 2006 was €163.5m, this represents 9% of the national capital investment in tourism (€1,798.1m). It is estimated that only €1.124m (.7%) was invested in water based tourism enterprises or activities, where Mayo received 81% share of the funds, Galway 15% and Roscommon just 4% which was invested in the 'Lough Key' project.

The total combined turnover in 2006 for 61 marine tourism operators in the region, is estimated to be €24,270,000. It is estimated that 82% of marine tourism operators in the West of Ireland achieve a turnover under €500,000 with 7% of this group earning less than €5,000. Approximately 394 people are employed full-time by marine tourism operators in the region and a further 295 people are employed part-time. On average 41% of turnover (€9,950,700.) is allocated to paying wages and approximately 58% (€14,076,600.) of turnover is allocated to other business expenditures such as goods and services which includes high rated expenses ranked by operators such as insurance, fuel, equipment and transport. The total indirect income equates to €7,281,000 and total induced income equates to €4,386,600 as a result of the initial direct injection of €24,270,000. All together they amount to €35,919,600 which equals the total economic impact of marine tourism operators in the West of Ireland in 2006. This indicates a multiplier of 1.48 which is in line with typical regional multipliers which vary from 1.4-1.6 due to one quarter of income leaking out of the region.

With regards to the associates businesses linked to the marine tourism sector, a range of nineteen marine products are sold by associates in the region. The most popular products sold include fishing gear and tackle (100% of associate businesses in the region), marine maintenance and engineering services (60%), chandlery (60%), marine electronics (60%) and boats/selling vessels (40%). Marine associate businesses now recognise they face new competition online where direct marine product stores are emerging and offering cost effective deals. An example of an online associate business is www.marineparts.ie. Surprisingly, only 38% of associate businesses in the region have a company website and only two associate businesses offer an online shop facility.

Similar to the operators, the associates feedback indicates the most effective sales and marketing tools used by associate businesses in the region is networking, personal selling, sailing/marine contacts, advertising in the Golden Pages and interestingly many associates believe they receive many leads from the marine special interest magazines such as 'Irish Skipper'. Associate businesses generally don't share information or network with each other in the region on a regular basis. Those that do communicate with each other (10-20% of businesses) share information on boats for sale, or customers requiring certain marine products. Approximately 8% of associate businesses are selling to marine tourism activity operators in the region and are generating from €5,000 - €20,000 per year in revenues. Associate businesses open for business on average 11 months of the year with summer being the busiest. With regards turnover and

performance, associate businesses were very reluctant to share any financial data for this study due to VAT thresholds and revenue concerns also the fact that many believed they were not a 'pure marine tourism provider' and they did not want their financial profile included in this study. As a result a summary of business categories and turnover ranges was presented based on the ranges of data that could be collected.

Over 53% of operators interviewed in 2006 would like to expand their business. However, there are a number of challenges the operator businesses share such as high fuel costs, marine regulations, no broadband, limited time to focus on business planning, unclear which government department is taking ownership of marine tourism product development and investment as well as marketing. Operators feedback indicates the top support services required for their sector include; A 'one stop shop' - with product managers/a dedicated business unit group for marine tourism in Ireland who will provide marketing advice, co-ordinate promotional opportunities for domestic and international market, prepare product development plans and develop and invest in sustainable waterbased products/businesses and marine tourism infrastructure in the area while also taking responsibility for market research and communication of government marine regulations.

The Chapter concludes with a West of Ireland seaside town case study, which evaluates the performance of businesses in a coastal village. As discussed in Chapter 4, the ESRI study in 2003 found that 49.3% of Irish residents enjoy free marine activities, which includes swimming in the sea and trips to the seaside or beach. Roundstone, represents a typical seaside resort in the West of Ireland which provides free access to marine tourism resources such as 'Dogs Bay Beach'. This beach is adjacent to 15 seaside businesses in Roundstone. It is a magnet for day-trippers, residents and holiday makers. Day visitor's trip to the beach is a special event. For residents in Roundstone, the beach is a local leisure resource, a regular and routine element of their daily life's. For holiday makers, it is a special experience, but one often repeated with tourists who return to the same location year on year.

An entire sample of 15 seaside business owners in Roundstone were interviewed in 2006 and early 2007. Businesses in the area include local grocery shops, gift shops, hotels, a caravan park, bars and restaurants. The research findings indicated three main categories of seaside businesses in Roundstone; small, medium and large. The business categories are determined by turnover. The medium to large sized organisations achieved a turnover ranging from €100,000 to €850,000 and employed 3-6 people full-time all year. This increased to 15-17 part-time during the summer period from June to September. Small seaside businesses in Roundstone on average achieved a turnover ranging from €25,000 to €80,000 employed 1 person full-time and one person part-time during the summer period. Supplies to the Roundstone seaside businesses are mainly coming from the West Region. The top expenses include fuel and staff and their major concern is the cost of rental accommodation in the area which ranges from €800 to €1,200 per week. This is a result of the impact of the holiday home rental market.

The seaside case study further demonstrates the value of marine tourism resources to the West of Ireland with particular emphasis on the potential and future value of the regional beaches. The West of Ireland coastline is highly indented and packed with blue flag and remote rural beaches which offer free marine tourism experiences. These marine tourism experiences have a monetary value and need supporting infrastructure and services to keep visitors in the area for longer or repeat visits. Therefore this valuable resource needs to be protected and developed further to realise its full potential.

This Chapter presented key insights from the '3P's Marine Tourism Business Sector Evaluation Model' and Chapter Seven will further explore the 'Policy' aspects of the model in relation to the West of Ireland. Chapter Eight brings together the conclusions and recommendations of this research study based on the three major themes explored in this thesis including 'Product', 'Person' and 'Policy'.

CHAPTER 7 MARINE TOURISM BUSINESS SECTOR WEST REGION - POLICY PROVIDER FINDINGS

7.1 Introduction

There are a number of state agents in the West of Ireland which play a role in supporting the tourism industry's development. The main bodies with responsibility for tourism strategy in the region include, Fáilte Ireland West, Udaras na Gealtachta, The Department of Community, Rural and Gaeltacht Affairs and Galway, Mayo and Roscommon County Councils. The role of the main government organisations has been discussed in Chapter Four.

This Chapter presents an organisational chart for the marine tourism sector in Ireland and a document analysis which examines the mix of marine tourism strategies proposed by various government organisations from 2002 up to 2012. In particular the findings highlight the level of 'aspirational statements' put forward by policy providers in relation to marine tourism, versus 'actual policies that have been implemented' from 2002 – 2007. The analysis concludes with the 2012 vision based on the Fáilte Ireland's regional tourism development plan (published in 2008) and pinpoints linkages to the marine tourism business sector development needs.

Figure 7.1: Policy Aspect of the Marine Tourism Business Sector Evaluation Model



Source: Extracted from the 3P's Marine Tourism Business Sector Evaluation Model, see Chapter 5, Figure 5.1.

7.2 Organisational Structure of the Marine Tourism Sector in Ireland

As discussed in Chapter Four the government and state sponsored bodies associated with or having an influence on tourism development in Ireland are many. This is due to the complex and interdependent nature of the industry.

There is currently no organisation chart for the marine tourism sector in Ireland that represents the management structure or the direction of the funding flow. Figure 7.2a best represents the structure in 2009, and the research findings in this study have informed the development of this organisational chart. The chart clearly illustrates the lack of one main authority that has responsibility for the management and development of the sector as a whole and this further informs the literature discussed in Chapter Four.

Figure 7.2a: Organisational Structure for Marine Tourism in Ireland

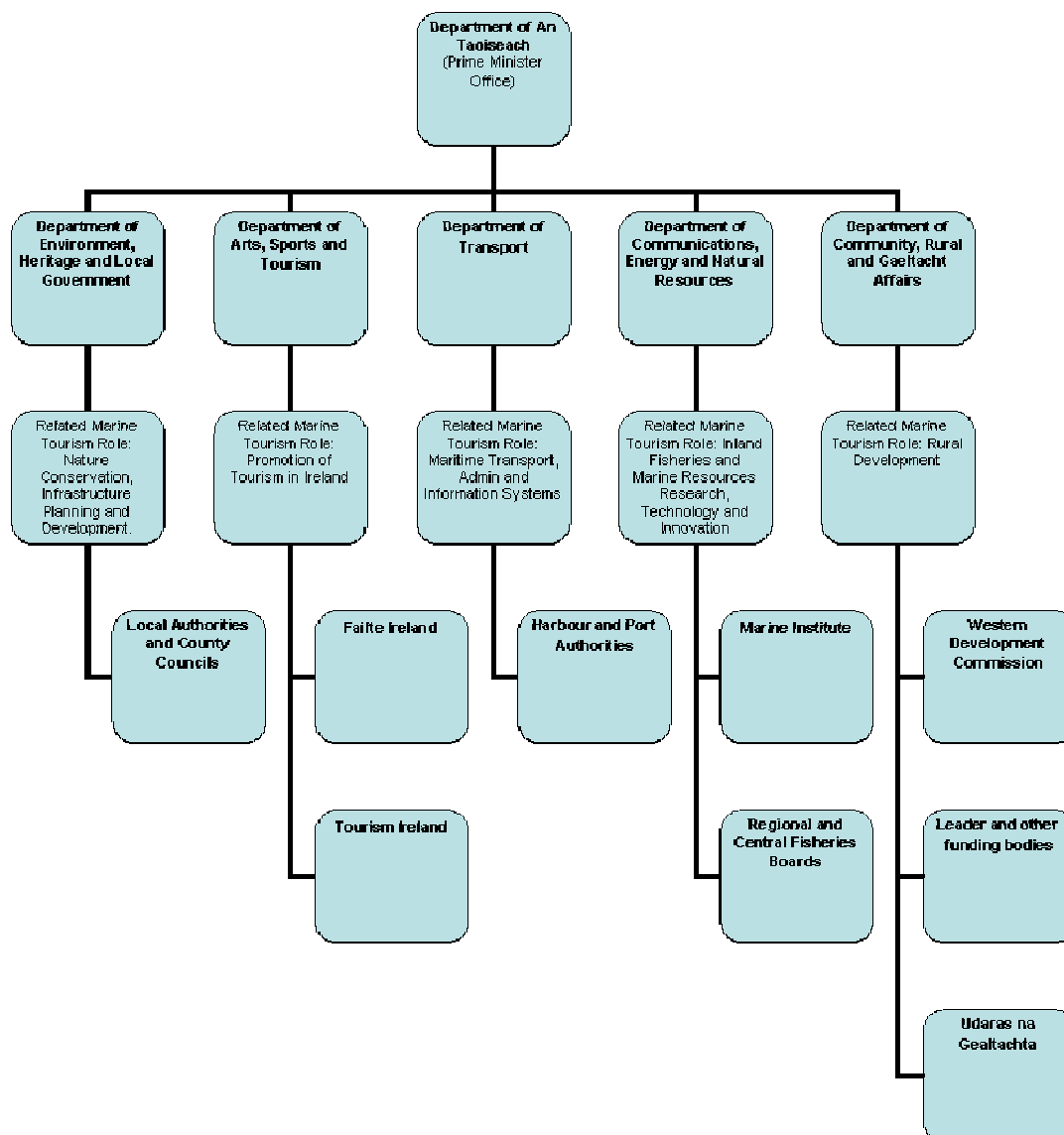








Figure 7.2b: Organisations Associated with Tourism Development in Ireland

Sector	Organisation		
Agriculture & food	<ul style="list-style-type: none"> • Dept. of Agriculture & Food • Irish Farmers Association • Teagasc • Keep Ireland Open • Restaurants Association of Ireland • Horse Racing Ireland 		Tourism enterprise development
Heritage	<ul style="list-style-type: none"> • An Taisce • An Dúchas • Councils – heritage & arts • Office of Public Works • Udaras na Gaeltachta • Arts Council 		
Enterprise	<ul style="list-style-type: none"> • Dept. of Enterprise, Trade and Employment • Enterprise Ireland • County Enterprise boards • Central Statistics & Companies Registration Office • Dept. of Finance • Business Loan Institutions e.g. banks • Interrag, Peace & Reconciliation funds, Fund for Ireland 		
Environment	<ul style="list-style-type: none"> • Dept. of Environment, Heritage and Local Government • Environmental Protection Agency • Dept. of Communications, Marine & Natural Resources • Marine Institute • Bord Iasca Mhara • Central & Regional Fisheries Boards • Coillte • The Green Box • Waterways Ireland 		
Rural development	<ul style="list-style-type: none"> • Dept. of Community, Rural & Gaeltacht Affairs • An Bord Pleanála • LEADER companies • FAS • BMW Regional Assembly • Western Development Commission 		
Tourism & Transport	<ul style="list-style-type: none"> • Dept. of Arts, Sport and Tourism • Fáilte Ireland • Tourism Ireland • Lottery award bodies • Councils – county & district • Local authorities • County development teams • Western Development Tourism Programme • Regional Tourism Authorities • National Roads Authority • Local tourism organisations/networks • Irish Tourist Industry Confederation • Irish Hotels Federation • Town & Country Homes Association • Bus Éireann • CIE • Dublin Airport Authority • Dublin Port Authority • Iarnród Éireann • Irish Aviation Authority 		

Source: Adapted from Hegarty, 2005.

Figure 7.2b best illustrates the principal government, state sponsored and independent bodies which have a role to play in tourism management and development in Ireland. Some of these bodies have a marine tourism interest. Figure 7.2b is by no means complete as it may differ depending on the type of tourism business.

7.3 West Region Policy Providers Evaluation

Table 7.1 presented in this section is a document analysis presentation and it outlines the range of marine tourism related strategies put forward by the bodies linked to the marine tourism sector since 2002 up to 2008. The table also examines the investment values and the actual deliverables to the marine tourism sector to date.

7.3.1

Table 7.1: Marine Tourism Sector Regional Investment & Development Plans Evaluation 2002- 2007

Strategy Report Publication	Strategic Success Driver	Action Proposed	State Body with Lead Role Responsible for Implementation	Start Date/ Timeline Action Proposed	Other Notes/ Deliverables or Status as at December 2007
'New Horizons for Irish Tourism, an Agenda for Action' – Report of the Tourism Policy Review Group to Minister for Arts, Sport and Tourism, September 2003.	To Improve Competitiveness and Value for Money	Make high standards the competitive advantage of Irish Tourism: Recognising that at its current stage of development, Ireland is a high-wage, high-productivity economy, a relentless upgrading of standards within the tourism sector should be promoted as a competitive response to lower cost alternatives in other countries. These high standards should encompass product, (accommodation, restaurants, visitor centres, activity products, natural and built environment), transport infrastructure and services.	Fáilte Ireland/ Tourism Industry Representative Bodies	September 2003 - Ongoing	New Horizons Report has been integrated into all regional tourism and product development plans
	Access Transport	Visitor Facilities at Seaports: Develop a programme to improve facilities for visitors at major seaports including information on arrival, improved reception facilities, easier and more attractive access through the ports.	Port Authorities	September 2003 - Ongoing	No Progress Reports Available
	Information and Communications Technologies	Information and Communications Technologies Programme: Develop a programme with the industry to maximise the use of information and communication technologies for training, marketing and customer relations management, including a strong demonstration campaign, co-operative networks and shared databases,	Fáilte Ireland and Tourism Ireland	January 2004 - Ongoing	No Progress Reports Available

		web-based training and the alignment of websites. Fáilte Ireland will have the 'enterprise facing role' and Tourism Ireland will have the 'Market and Consumer Facing Role'			
		Award/Recognition Schemes: Fáilte Ireland should establish, promote and widely communicate awards to acknowledge excellence in the application of information and communications technologies in different areas of tourism including hotels, other accommodation, visitor and activity centres etc.	Fáilte Ireland	January 2004 - ongoing	
	Product Development & Innovation	Innovation Fund: Establish, on a pilot basis, for a 3 year period, an innovation fund to promote and support on a competitive basis, the development of tourism products that are new to the Irish market, have a clear potential to attract additional visitors and incorporate best practice particularly in terms of environmental sustainability, accessibility for tourists with disabilities and equality in service provision.	Fáilte Ireland	2004-2006	No Progress Reports Available
		Product Clusters: In order to address the under utilisation of certain historical, cultural and sporting attractions and facilities, it is essential to achieve a better presentation and more integrated and cooperative marketing of clusters of products that complement each other and broaden the offerings available to visitors, including those with disabilities. The clusters can be single product (e.g. golf, heritage etc.) or multi-product (e.g.	Groups of Tourism Product Suppliers/ Regional Tourism Authorities/ Fáilte Ireland	September 2003 - ongoing	

		golf/health-related, culture/heritage, marine etc.) and could be promoted and supported at regional level or on an all-island basis.			
		Product Research: Identify international trends in the supply and demand of tourism products (to anticipate/meet emerging best prospects such as demand for well-being and health breaks, quality destinations for city breaks, car touring, cruising) particularly in the markets against which Ireland competes. Communicate this information widely within the tourism industry in Ireland and use it to support product development and market development plans.	Fáilte Ireland, Tourism Ireland & Tourism Industry Representative Bodies jointly.	September 2003 - ongoing	
		Access Rights: Establish clear guidelines and codes of practice on rights of access for visitors to the countryside, hills, mountains, coast and State-owned forestry and bring clarity to the legal position in relation to public liability.	Department of Community, Rural and Gaeltacht Affairs in consultation with Farm Organisations, Local Authorities, Regional Tourism Authorities and Coillte and Fáilte Ireland	January 2004 complete guidelines	
		UNESCO World Heritage Site Designation: Put in place the consultation, management and conservation arrangements necessary to achieve the designation of additional sites in Ireland as UNESCO World Heritage Sites.	Department of the Environment, Heritage and Local Government	September 2003 - aim to achieve an additional designation by 2005	

		All-island Marketing Initiatives: Promote more strongly the development and marketing of clusters of complementary products on the island of Ireland in areas such as cultural facilities (museums, music festivals, theatre events) and sporting facilities (golf, angling, walking).	Tourism Ireland and Tourism Industry Representatives North and South.	September 2003	
		E-Marketing: Enhance e-marketing capability to ensure that potential and repeat international and domestic customers receive world class information services and can be easily directed to online purchasing services for the full range of Irish tourism products/packages flights and ferries.	Tourism Ireland and Fáilte Ireland		2007 www.discoverireland.com launched
	The Government Sector	Regional Tourism Authorities: Establish a closer correlation between the identified core visitor servicing and development functions provided by the Regional Tourism Authorities and the State financial support provided to them through Fáilte Ireland. Agree the new regional structures for the discharge of Fáilte Ireland's functions and determine the appropriate relationships and arrangements at regional level.	Fáilte Ireland	January 2004	
		Regional/Sub-National Structure: In order to more effectively harness the depth of knowledge, interest and commitment to the development of tourism at regional, county and sub-county level, it is essential that an early review of the functions, activities and interactions of the many bodies involved in tourism promotion and development be undertaken as a matter of	Dept. of Arts, Sports and Tourism / Fáilte Ireland	September 2003	- Re-structure of regional tourism centres established in 2006 - Regional Tourism Forum established in 2007

		<p>urgency.</p> <ul style="list-style-type: none"> - a clear definition of roles and functions of different bodies involved in the promotion and development of tourism at regional and local levels. - the identification and removal of areas of overlap and duplication together with the actions - the establishment of a forum and supporting organisational structure at regional, county and local tourism development level 			
<p>Developing Sustainable Tourism in Galway: A Framework for Action - Galway City & County Tourism Committee, July 2003.</p>	<p>Promoting Galway's Tourism Products</p>	<p>Cruise Liner Activity: Facilitate further investigation into a long term marketing strategy aimed at increasing cruise liner activity to Galway.</p>	<p>Galway Harbour Company, Fáilte Ireland West</p>	<p>March 2004 - ongoing</p>	<p>No funding allocated to date as infrastructure investment and foreshore agreements have to be reached with government to develop Galway as a Cruise Liner stopover.</p>
<p>Galway County Strategy for Economic, Social and Cultural Development 2002-2012</p>	<p>Promote Vibrant Island Communities</p>	<p>Develop a plan of investment in leisure and social amenities for islands.</p>	<p>Department of Community, Rural and Gaeltacht Affairs</p>	<p>2002-2012</p>	<p>Air access Inishbofin project completion 2008/09</p>

<p>Investment Programme 2000-2006: for Water-based Tourism and Leisure Sector in Ireland.</p>	<p>A submission to NDP 2000-2006 to secure funding to develop the marine tourism sector in Ireland</p>	<p>A submission from the Marine Institute examining the economic value and development needs of the water based tourism and leisure sector – seeking £96m public funding with the total investment programme £130m (€165.1m).</p>	<p>NDP 2000-2006</p>	<p>2000-2006</p>	<p>No funding by NDP allocated to marine tourism development in the West</p>
<p>Water-based Tourism: A Strategic Vision for Galway 2002</p>	<p>Identification of water-based tourism and leisure initiatives for Galway</p>	<ol style="list-style-type: none"> 1. Enhanced Marina Provision for Galway City 2. Eglinton Canal Promenade 3. Marine Tourism Development Potential of Galway Docks 4. Salthill enhance water based facilities. 5. Develop Lough Rusheen as a waterpark and nature reserve 6. Earls Island and Eglinton Pier amenity enhancements and provision of sewage discharge facilities for passenger carrying leisure boats. 7. Establishing a Lough Corrib Discovery Centre. 8. Develop a tourism plan for Inishbofin 9. Re-development of South Connemara Fisheries 10. Development of marina facilities in Roundstone. 11. Coastal zone management in Killary Harbour. 12. Brand Killary Harbour as a national marine watersports destination and develop a national facility centre. 13. Develop angling facilities on the 	<p>Report submitted to NDP and Galway County Development Boards and Councils</p>	<p>From 2002</p>	<p>Inishbofin tourism development plan completed 2007 by GMT, WHITR funded by Leader.</p> <p>Marine tourism development Galway Docks 25 berths completed Feb '08 through the Harbour Company Investment.</p>

		<p>river Shannon, the river Clare, river Suck and Loughrea.</p> <p>14. Need to collect more regional and sectoral market data to make informed marketing and product development decisions.</p>			
<p>The New West: A Tourism Plan 2002-2004</p> <p>(The Western Development Tourism Programme Steering Group: 7 county region – Donegal, Sligo, Leitrim, Roscommon, Mayo, Galway and Clare).</p>	<p>Celebrate and interpret the water environments of the West</p>	<p>Create and manage a sub brand for water-based Ecotourism ventures e.g. whale/dolphin watching, islands initiative, Shannon ecotours.</p>	<p>Partners: Marine Institute, Waterways Ireland, Central Fisheries Board.</p> <p>Cost €35K p.a.</p>	<p>Target: network & assist 10 initiatives by end 2002</p>	<p>No outcomes to date.</p>
	<p>Integrated Marine Tourism Planning</p>	<p>Develop and network existing county marine tourism plans Clare/Galway/Donegal. Assist less developed regions dovetail into new Western Marine Tourism Strategy</p>	<p>Partners: Marine Institute, Local Authorities plus other public bodies along with communities.</p> <p>Cost: €40K p.a.</p>	<p>Target: 3 networked regions with one overall plan including feed-in by 10 new communities initiatives by end 2004.</p>	<p>No outcomes to date.</p>
	<p>Angling Strategic Marketing Plan for Less Developed Areas/Products</p>	<p>Assist in the creation of an integrated region-wide marketing plan for specific aspects of tourism/leisure angling both sea and inland.</p>	<p>Partners: Multiple</p> <p>Cost: €30,000 p.a</p>	<p>Target: Specific Area Strategies for new fish types e.g. tuna & pike by 2004</p>	<p>No outcomes to date.</p>

A total of six reports published since 2002 have been reviewed by the author of this thesis. There has been thirty seven strategic references/statements made in relation to marine tourism in Ireland and in 2006 it is estimated that only 0.7% (€1.125m) of tourism investment in the West of Ireland (Galway, Mayo and Roscommon) went to water-based products/ marine tourism. The source of this estimate is discussed below following analysis of the latest (2008) Fitzpatrick Associates Capital Investment in Tourism Report.

Fitzpatrick Economic Consultants (2008) have reported on the level of capital investment in tourism in Ireland from 2002-2006. Fitzpatrick findings indicate that the majority of expenditure in 2006 (over €1.4 bn, or 76%) was in the NUTS II² Southern and Eastern Region (S&E Region). The remaining €430m was spent in the NUTS II Border, Midland and Western Region (BMW Region). There has been a similar regional spread of investment over the past five years, though with a further small shift towards the Southern and Eastern Region in 2006.

Five counties, namely Dublin (20.7%), Meath (10.9%), Cork (10.2%), Mayo (7.4%) and Limerick (6.3%) accounted for 55% of all public investment in 2006. New hotel developments led to an upsurge in investment activity in Meath, Mayo, Limerick, Kilkenny and Cavan in particular, while there was a slowdown in investment activity in the traditional tourism counties of Kerry and Galway.

The main tax incentives acting as a stimulant for capital investment in Irish tourism are: Capital Allowances for Construction and Refurbishment of Hotels; Capital Allowances for Holiday Camps and Cottages; the Business Expansion Scheme/Seed Capital Scheme; Capital Allowances on Industrial Buildings; Capital Allowances on Plant, Machinery and Motor Vehicles; and the Urban, Rural and Town Renewal Schemes. While some of these schemes are currently being discontinued on a phased basis, there have been other important developments under other schemes, but particularly the Business Expansion Scheme and Seed Capital Scheme. Only two of these tax incentive schemes promote marine tourism enterprise developments such as tax breaks for marina developments and the seed capital programme, where someone wishing to establish a new marine tourism enterprise can claim tax back for 3 years.

The 2007 Budget led to the announcement of a new tax relief scheme, the Mid-Shannon Corridor Tourism Infrastructure Investment Scheme, which aims to encourage investment in new tourism infrastructure and the refurbishment of existing tourism infrastructure in the mid-Shannon area.

In Figure 7.3 the main product types where money was invested in Ireland in 2006 were golf (€44.5m), visitor attractions (€25.7m), the arts/theatre (€22.7m) and water-based activities (€12.5m). 'Water-based' investment refers to investment in water-based activities generally, including marina developments, water-based attractions and activities, angling, inland

² The Regionalisation arrangements negotiated by the Government in the context of the Agenda 2000 agreement resulted in the designation of the country into two N.U.T.S. II Regions for Structural Funds purposes including the BMW region and the S&E Region.

waterways etc; Other leisure activities accounted for approximately €6.1m of total investment, while just €0.3m was spent on information and signposting.

FIGURE 7.3: BREAKDOWN OF INVESTMENT BY TYPE AND SOURCE 2006 (€mn)								
Type	TOTAL		Public		Private		EU/IFI	
	€m	%	€m	%	€m	%	€m	%
Visitor Attractions	25.7	1.4	16.5	2.4	1.4	0.1	7.7	70.0
Information/Signposting	0.3	0.0	0.2	0.0	0.0	0.0	0.1	1.1
Water-based	12.5	0.7	9.2	1.3	3.1	0.3	0.3	2.8
Golf	44.5	2.5	0.5	0.1	44.0	4.0	0.0	0.0
Other Leisure	6.1	0.3	1.6	0.2	3.3	0.3	1.1	10.1
Accommodation-related	1,686.4	93.8	639.7	92.7	1,045.2	95.3	1.4	12.7
Arts/Theatre	22.7	1.3	22.3	3.2	0.0	0.0	0.4	3.3
TOTAL	1,798.1	100.0	690.1	100.0	1,097.1	100.0	11.0	100.0
Note: Accommodation includes related investment, i.e. co-financed investment in accommodation-related developments, tax-incentivised investment in new accommodation stock and other investment in leisure and spa facilities. Figures may not add due to rounding.								
SOURCE: FITZPATRICK ASSOCIATES ESTIMATE, 2008								

Private-led expenditure amounted to €1.1bn in 2006. Of this, over €1bn (95%) was invested in accommodation-related product, while €44m (5%) was attributed to investment in golf. A further €8m in private expenditure, meanwhile, was invested in water-based activities, other leisure activities and visitor attractions.

Again, the majority of public sector expenditure (€640m, or 93%) was also accounted for by accommodation-related products. In addition, the public sector invested €22m in arts/theatre products, nearly €17m in visitor attractions and over €9m in water-based activities. A further €2m, meanwhile, was invested in information and signposting, golf and other leisure activities.

Finally, about 70% of the €11m expenditure under EU/IFI schemes was invested in visitor attractions, while almost 13% was in accommodation-related product and another 10% was in other leisure activities.

FIGURE 7.4: TRENDS IN INVESTMENT BY TYPE 2002-06 (2006 PRICES)					
	2002 (€m)	2003 (€m)	2004 (€m)	2005 (€m)	2006 (€m)
Visitor Attractions	13.3	20.8	12.0	17.2	25.7
Information/Signposting	0.1	0.0	0.5	0.2	0.3
Water-based	10.1	5.8	15.9	15.6	12.5
Golf	24.2	12.8	28.7	47.8	44.5
Other Leisure	3.1	1.2	4.7	4.8	6.1
Accommodation-related	267.8	371.7	558.7	733.9	1,686.4
Arts/Theatre	7.9	10.7	6.9	18.1	22.7
TOTAL	326.8	423.0	627.0	837.5	1,798.1
SOURCE: FITZPATRICK ASSOCIATES ESTIMATE, 2008					

Investment in visitor attractions and arts/theatre products has also seen a noticeable increase in both 2005 and 2006. Investment in golf has increased in 2005 and 2006, while investment in water-based activities and other leisure activities have maintained a smaller but steady level of investment in recent years.

Figure 7.5 below shows co-financed investment broken down by programme and by main product type. The majority of ROP (Regional Operational Programmes) spend was on visitor attractions (€24.6m), water-based activities (€8.4m) and arts/theatre product (€8.4m). CEB/LEADER expenditure was mainly attributable to accommodation-related product (€3.2m), other leisure activities (€3.0m) and water-based activities (€2.0m).

FIGURE 7.5: CO-FINANCED INVESTMENT BY PROGRAMME AND TYPE 2006 (€mn)				
	ROPs	CEB and LEADER	IFI, PEACE and INTERREG	TOTAL
Visitor Attractions	24.6	0.7	0.4	25.7
Information and Signposting	0.2	0.0	0.1	0.3
Water-based	8.4	2.0	0.0	10.3
Golf	0.0	1.2	0.0	1.2
Other Leisure	2.9	3.0	0.2	6.1
Accommodation-related	4.0	3.2	0.9	8.1
Arts/Theatre	8.4	0.0	0.0	8.4
TOTAL	48.5	10.1	1.6	60.1
Note: CEB and LEADER funding for tourism has been provided as part of the ROPs. However, shown separately here for this table.				
SOURCE: FITZPATRICK ASSOCIATES ESTIMATE, 2008				

Note Terminology on Figure 7.5:

- **ROPs:** the 2000-06 Border, Midland and Western (BMW) and Southern and Eastern (S+E) Regional Operational Programmes;
- **TPDS:** the Tourism Product Development Scheme, which is part of the ROPs for the BMW Region and S+E Region;
- **IFI:** the International Fund for Ireland, which is an economic and social development fund in Northern Ireland and the border counties (Cavan, Donegal, Leitrim, Louth, Monaghan and Sligo);
- **CEB/LEADER:** the City and County Enterprise Boards/LEADER Groups, which provide support for micro-enterprise and rural development at a local level;
- **BES:** the Business Expansion Scheme, which gives individual investors tax relief on investments they make in certain companies

Figure 7.5 provides a breakdown of tourism capital investment by region in 2006. At a NUTS II planning level, 76% of total investment in 2006 took place in the S+E Region, while 24% took place in the BMW Region. This represents a broadly similar spread of investment when compared to previous years, though with a slight increase in the proportion of investment in the S+E Region.

Figure 7.6 also outlines total capital investment by NUTS III planning region. The greatest percentage of investment in this case was in Dublin (21%), which is consistent with previous years. The two regions with the lowest level of investment were: the West Region (9%), which includes Galway, Mayo and Roscommon; and the Midland Region (5%), which includes Laois, Longford, Offaly and Westmeath.

FIGURE 7.6: CAPITAL INVESTMENT BY PLANNING REGION 2000-06 (2006 PRICES)				
Region	2006		2000-06	
	€mn	%	€mn	%
Border	182.6	10.2	614.5	11.4
Midland	82.6	4.6	290.4	5.4
West	163.5	9.1	534.9	9.9
Dublin	372.0	20.7	1,423.4	26.4
Mid-East	306.6	17.1	639.5	11.8
Mid-West	214.7	11.9	495.6	9.2
South-East	235.7	13.1	641.3	11.9
South-West	237.3	13.2	752.5	13.9
BMW Region	428.7	23.9	1,442.2	26.7
S+E Region	1,366.3	76.0	3,955.0	73.2
Unallocated	3.1	0.2	5.5	0.1
TOTAL	1,798.1	100.0	5,400.2	100.0
Note: Figures may not add due to rounding.				
SOURCE: FITZPATRICK ASSOCIATES ESTIMATE, 2008				

Figure 7.7 highlights the breakdown of capital investment by county in the West region in 2006 and from overall from 2000 up to 2006. From a national perspective Mayo had the fourth highest level of investment in 2006 and the highest in the West, at €132m, whereas it had the 15th highest level of investment in 2005, at €12m. Its level of investment in 2006 was also nearly 40% higher than its total level of investment for the 2000-05 period. From a West regional perspective it received 81% of the funds in 2006 and a 43% share overall from 2000-2006. Fáilte Ireland (2008) believe Mayo have been more successful at securing funding due to the active engagement of local businesses, county council members and local politicians lobbying government for tourism infrastructure investment and support. Generally, these trends have been driven by high levels of hotel development activity in the affected counties.

FIGURE 7.7: BREAKDOWN OF CAPITAL INVESTMENT BY COUNTY IN THE WEST REGION (2006 PRICES)				
	2006		2000-06	
	€m	%	€m	%
Mayo	132.4	81%	228.5	43%
Galway	24.2	15%	276.7	51.5%
Roscommon	6.9	4%	29.8	5.5%
TOTAL	163.5	100.0	535	100.0
SOURCE: ADAPTED & UPDATED TO HIGHLIGHT WEST REGION (FITZPATRICK ASSOCIATES ESTIMATE, 2008)				

In Meath, Mayo, Limerick, Kilkenny and Cavan new hotels accounted for nearly 40% of the total room capacity for all new hotels opened in Ireland in 2006. Roscommon received one of the

lowest level of investment from the national share and only a 4% share of the West regional funds.

In 2006, it is estimated that there was capital investment of €7.0m in island ferries serving the Aran Islands (Fitzpatrick Associates, 2008). Assuming that 50% of this investment is attributable to tourism, therefore, gives a tourism capital investment estimate of €3.5m (Fitzpatrick Associates, 2008).

Following evaluation of the strategies developed from 2002-2007 by Galway, Mayo and Roscommon Co. Councils, the level of planning is weak in relation to ‘marine tourism’ product development and business support. The following extracts clearly demonstrate the lack of vision, investment or commitment to this sector. For example in extract 1 and 2, this is not a policy, this is a statement. It is only a policy if it has an implementation strategy (Hanrahan, 2007).

Extract 1: from Mayo Co. Council Development Plan 2003-2009

4.6.4 Marinas.

Marinas should be developed where the associated activity is already underway or where a tangible demand for such a facility exists. Marinas should provide adequate water depth, berthing arrangements for pleasure craft, navigation aids, pontoon lighting, fire safety equipment, toilet facilities, a sufficient level of road access, car parking, direct access and walkways to boats. Such a proposal should take the quality of access into account. Facilities such as boat quays should be integrated into the shoreline and avoid water intake points.

Source: Mayo County Council, 2003.

Extract 2: Roscommon Co. Development Plan - Schedule 14 Major Amenity Scheme Proposals

A16	Kilglass Lakes Area	Development required to cater for growing use of the area for recreation and tourist purposes	To investigate the developments necessary for the area to cater to its present use as a popular tourism and recreational area
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Source: Roscommon County Development Plan 2002

7.3.2 Marine Tourism Sector Regional Investment & Development Plans Evaluation 2008-2012

Table 7.2 presented in this section is a document analysis presentation and it outlines the range of marine tourism related strategies proposed by the bodies linked to the marine tourism sector from 2008 up to 2012. The table also examines the investment values and the actual deliverables or commitments made to the marine tourism sector to fulfil these objectives.

7.3.2 Table 7.2: Marine Tourism Sector Regional Investment & Development Plans Evaluation 2008-2012

Strategy Report Publication	Strategic Success Driver	Action Proposed	State Body with Lead Role Responsible for Implementation	Start Date/ Timeline Action Proposed	West of Ireland Deliverables & Status as at April 2008
Fáilte Ireland West, Regional Tourism Development Plan 2008-2010	Develop the Region as Ireland's Primary Outdoor and Adventure Destination while focusing on environmental sustainability.	<p>- Present an integrated product identity making the West irresistible – maximise the USPs in outdoor activities, angling, marine and watersports. Introduce 'Leave-no-trace' code of ethics for all outdoor activities in the region. Industry.</p>	Industry Local Authorities Agencies: Udáras, LEADER, Sports Council	Within 2 years	<ul style="list-style-type: none"> - FI driving Interreg Project with 3 EU Atlantic partners - Tourism enterprise network set up... Jamie Young (Killary Group) chairperson .. this is an active group joint marketing and developing the product in the West....cross selling among themselves etc. - FI commit to related events valued at 240k - €400K investment in TV media campaign for domestic market - €600K investment in TV media campaign for international market.
		- Engage with key partners in the activity and adventure industry to develop and promote the Adventure Boomerang	Achill Tourism Industry Partners	By 2009	As above
		- Build on Adventure events i.e. exploit Volvo Ocean Race	Organisers	2008 onwards	€8m investment committed to Galway Stopover

		Excellence in Great Western Lakes – Corrib, Mask, Carr	LEADER Local Authorities (Galway and Mayo County Councils) Local Industry		not established as yet - identified special trout in Lough Mask unique to Ireland to push in marketing campaigns
	Continue to develop Tourism Hubs in order to develop synergies	- Integrated approach to brand Connemara as a tourism hub both domestically and overseas.	DCRGA LEADER Udaras Comhdháil na nOileán Industry Local Community	2008	Connemara Campaign underway....Marketing and PR investment to date €75k on film shown in Paris + €250k aimed at French, Belgian and English Markets and an online media campaign etc.

Fáilte Ireland West region has, in conjunction with stakeholders in the region, prepared the West Tourism Plan 2008-2010. According to Falite Ireland (2008) the strategies and implementation plans engaged both national and local agencies, local authorities and other public sector agencies working in tandem with the local business community to achieve the targets set for tourism in the region. The plan is intended to provide a road map so that all the key players from both the public and private sector can most effectively contribute to the further development of sustainable and economically beneficial tourism in the region.

The West Region's Tourism Plan 2008-2010 focuses on:

- Strategic decisions on planning and investment in regional attractions and infrastructure to ensure the best regional outcome
- Clearer direction for all stakeholders together with clarifying roles of various local and central government agencies in supporting regional tourism, thereby aiding decisions on resourcing and regulating tourism projects
- Clear prioritisation of regional marketing propositions – priority appeals and market match in both the home and overseas markets
- Closer alignment of the services of Fáilte Ireland to the needs of the industry at local level, resulting in operational efficiencies, more effective investment of public funding and easier access for tourism operators to relevant support.

The 2008-2010 regional strategy is consistent with the national strategy but with strong regional ownership and a set of practical interventions and projects to grow the value gained from tourism and limit potential negative impacts of tourism in the region. Fáilte Ireland West has said “we set out to secure clear tourism policy statements in all local and regional government statutory plans that put tourism in perspective in terms of its relative importance as an economic driver and contributor to other community outcomes. The overall aim is to provide the necessary tourism infrastructure and service in the region to sustain tourism revenue into the local economy; help businesses and employment in the hospitality sector to grow; project a better appeal; and deliver a better visitor experience” (p9).

While the opportunities are good, the scale of the challenges should not be underestimated. According to Fáilte Ireland the plan will guide the marketing campaigns, product development priorities and enterprise support programmes in the region to ensure sustainable growth for the business and resident communities of the region. The key marine tourism related strategies put forward in the Plan include developing the region as Ireland's primary outdoor and adventure destination while focusing on environmental sustainability. A summary of marine tourism related actions presented by Fáilte Ireland include;

- Brand the West as an Outdoor Capital of Ireland and make the rural West irresistible to visitors.
- Maximise the potential of the USP's of outdoors activities, marine and angling.

- Focus on the conservation and protection of the environment, including the promotion of better environmental practices.
- Build an Adventure Boomerang including Achill Activity Island, Adventure Centres at Achill, Uisce, Delphi, K2, Petersburg.
- Invest and Support Adventure Events - Gaelforce, New All Ireland Challenge and Wild Ireland Run, Marine - Volvo Ocean Race 2009.
- Lobby for/act as an advocate for the development of marinas at key locations along the west coast e.g. Galway City, Westport and Ballina.
- Provide additional visitor moorings and upgrade existing visitor moorings.
- Support the feasibility of an artificial reef for diving.
- Develop angling centres of excellence – salmon capital – wild brown trout lakes.
- Develop Salthill – Barna coastal walk.
- Utilise the Lakelands approach in East Roscommon and East Galway.
- Support the feasibility of re-opening the Galway-Clifden railway line as a greenway for walking and cycling.

In 2008 a total of €9.565m was committed and a further €15.6m was sought to implement the marine tourism related strategic actions of the West Regional Tourism Development Plan 2008-2010. Over 83% of funds committed to date relating to marine tourism went to one event the Volvo Ocean Race, which took place in Galway in June 2009. The Volvo Ocean Race is the biggest international event ever to be hosted in Ireland.

As a result of the strategic actions and level of investment expected, Fáilte Ireland have set ambitious targets in terms of holiday visitors for the period 2008–2010, most notably to continue to grow the short-break domestic business while maintaining market share of overseas markets. By 2010, the region aims to earn up to €980 million from tourism activities attracting between 2.1m and 2.3m holiday visitors. This is a big jump from the 2006 figures discussed in Chapter 3 where 1.4m visitors spent time in the West and generated €469.2m in revenue for the region. This represents an ambitious 50% rise in visitor numbers and over a 50% jump in tourism revenue is expected by 2010. In the current economic climate these targets will be difficult to obtain.

Figure 7.8: 2008-2010 Holiday Visitor Targets to the West

	2006	Low	Mid	High
Domestic	760,000	890,000	930,000	990,000
Overseas	1,000,000	1,170,000m	1,210,000	1,300,000
Total	1,760,000	2,060,000	2,140,000	2,290,000

Source: Fáilte Ireland, West Tourism Development Plan, 2008-2010.

7.4 Chapter Summary

This Chapter concludes the 'Policy' findings related to the 3 P's Marine Tourism Business Sector Evaluation Model. An organisational chart has been prepared by the author that represents the current management structure of the marine tourism sector in Ireland and the document analysis tables examine the mix of marine tourism strategies proposed by the bodies from 2002 up to 2012. In particular this Chapter has highlighted the level of 'aspirational statements' put forward by policy providers in relation to marine tourism, versus actual policies that have been implemented from 2002 – 2007.

The government and state sponsored bodies associated with or having an influence on tourism development in Ireland are many. This is due to the complex and interdependent nature of the industry. The organisational chart presented in section 7.2 represents the management structure of the marine tourism sector and the direction of the funding flow. The main bodies with responsibility for research and strategy development linked to the marine tourism sector includes, Fáilte Ireland West, Regional County Councils, Udaras na Gealtachta, Teagasc to some extent, the Marine Institute for research only. However, since August 2008 responsibility for the development of marine leisure on the West of Ireland now lies with the Department of Community, Rural and Gaeltacht Affairs. It is clear from the research undertaken that none of these state organisations are taking the lead with mapping and planning for the development of this niche tourism sector. There are many marketing and promoting marine leisure but there is no investment plan or product roadmap linked to the marketing and promotional activities. An organisation with responsibility for the entire lifecycle of the marine tourism product in Ireland is critical to the sustainable development of the sector.

As a result of a lack of one authority with control over the development of the marine leisure sector, state agencies and bodies have presented a number of aspirational statements posing as policies in strategic plans. It is only a policy if it has an implementation strategy with funding attached to the strategic plan. A total of nine strategic reports published since 2002 have been reviewed in this Chapter. There has been thirty seven strategic references/statements made in relation to marine tourism in Ireland and in 2006 it is estimated that only 0.7% (€1.125m) of tourism investment in the West of Ireland (Galway, Mayo and Roscommon) went to water-based products/marine tourism (Fitzpatrick Associates, 2008). It was also reported the region with the lowest level of tourism investment in the country was the West Region (9%).

Fáilte Ireland in the West has, in conjunction with stakeholders in the region, prepared the West Tourism Plan 2008-2010. The key marine tourism related strategies put forward in the plan include developing the region as Ireland's primary outdoor and adventure destination while focusing on environmental sustainability. Since April 2008, a total of €9.565m has been committed and a further €15.6m is needed to implement the marine tourism related strategic actions of the West Regional Tourism Development Plan 2008-2010. Over 83% of funds

committed to date relating to marine tourism went to one event the Volvo Ocean Race, which took place in Galway City in June 2009. The Volvo Ocean Race is the biggest international event ever to be hosted in Ireland (Fáilte Ireland, 2008). As a result of the strategic actions and level of investment expected, Fáilte Ireland have set ambitious targets in terms of holiday visitors for the period 2008–2010, most notably to continue to grow the short-break domestic business while maintaining market share of overseas markets. Since the strategy was published the global economy has taken a downturn and Ireland's ambitious tourism targets for 2010 will now be difficult to meet.

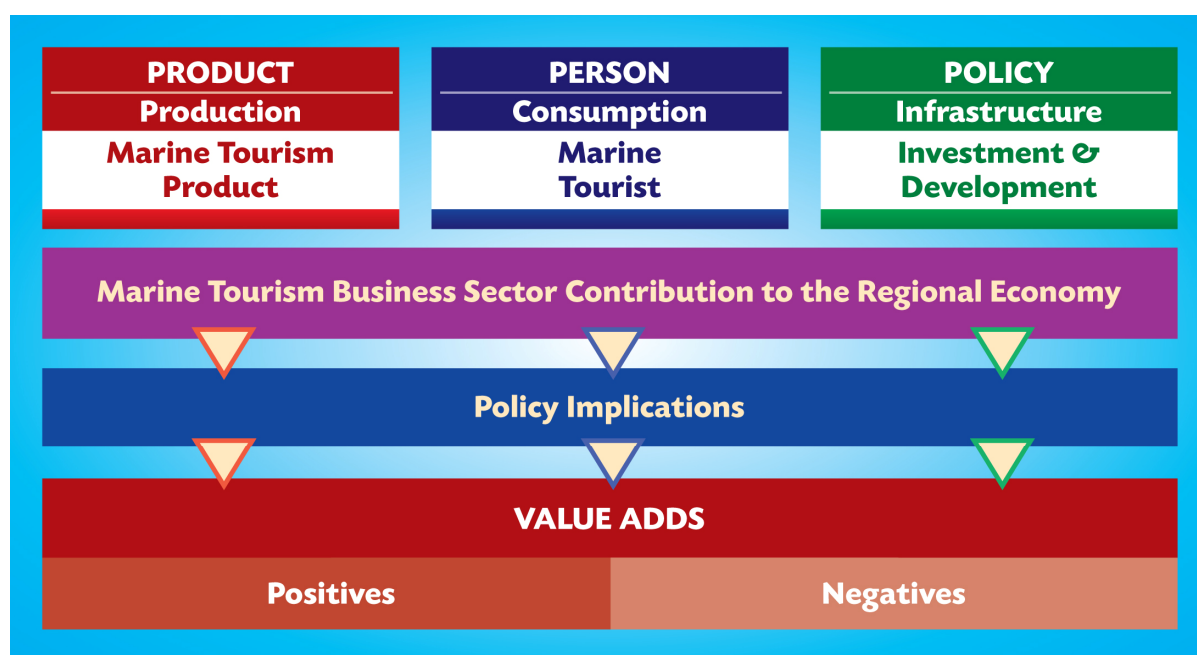
The proposed adventure tourism marketing promotional agenda will play an important role in driving numbers to the region. However, a strong marine tourism infrastructure and product investment plan needs to run alongside the promotional agenda so that the 'adventure marine seeking tourist' who arrives in the region is impressed and inspired by the range of operators, things to do, and the high level of facilities and support infrastructure available. This is critical in order to ensure repeat visitation and long term growth of the sector.

CHAPTER 8 CONCLUSIONS & RECOMMENDATIONS

8.1 Introduction

This is a business research study with the primary aim being the examination of the marine tourism business sector in the West of Ireland and assessment of its contribution to the regional economy. Chapter Eight concludes and draws together the findings derived from ‘The 3P’s Marine Tourism Business Sector Evaluation Model’ (see Figure 5.1 in Chapter Five), highlighting a series of product, person and policy recommendations and the potential areas for further research and investigation. This Chapter also discusses the original contributions and the practical outcomes that this research study has provided. Finally a reflective piece is presented which explores the researcher’s PhD learning journey.

Figure 8.1: Conclusions & Recommendations from the 3P’s Evaluation Model



Source: extracted from the 3P’s Marine Tourism Business Sector Evaluation Model, (see Chapter 5, Figure 5.1).

8.2 Product

The West of Ireland possesses a diverse mix of marine tourism product providers selling marine tourism experiences. This study found these small businesses are typically family-owner operated, generally small-scale, highly seasonal and undercapitalised, and can be classified as 'operators' or 'associates'. The operators issue licenses or provide marine tourism products for hire or activity-coaching for daily, weekly or hourly rates. Marine tourism operators provide one to many water-based products, ranging from just fishing or scuba diving to a range of water sports including surfing, canoeing, water skiing and others. On the other hand, marine tourism associate businesses typically provide marine related equipment and angling supplies for sale to locals, operators and tourists, such as boats, marine electronics, surfboards, wetsuits, bait, rods and other items.

In 2006, 61 marine tourism business operators were recorded, with 54% (33) in Galway, 38% (23) in Mayo and 8% (5) in Roscommon. This study further examined the marine tourism business associates in 2007, where 23 businesses were identified in the region, with 73% (17) in Galway, 22% (5) in Mayo and 4% (1) in Roscommon. Just 8% of the marine tourism associate businesses are selling to marine tourism operators in the region. This finding represents a very low business linkage between the two groups and indicates a number of issues such as a lack of networking amongst the sector and a leader/support group which could help drive and direct the economic linkages and the sectors long term growth.

The marine and water leisure product portfolio in the region includes free and paid activities (see Figure 8.2 below). Ireland holds a significant comparative advantage over many European countries in terms of the quality and extent of its coastal and marine products and scenery

Figure 8.2: Free versus Paid - Marine Tourism Activities

Free Marine Tourism Activities	Paid Marine Tourism Activities
Swimming in the Sea	Pleasure Boating
Recreational Trips to the Beach or Seaside	Boat visits to Islands
Coastal & Inland Waterway Routes for Walking/Running/Climbing	Sailing, Canoeing, Sea Kayaking
Coastal Bird Watching	Wind/Board Surfing
	Maritime Museums/Interpretative Centres/Aquaria
	Mammal Watching
	Water Skiing
	Scuba Diving
	Coastal & Inland Passenger Boats/Pleasure Cruises
	Inland Passenger Boats/Pleasure Cruises
	Sea & Coarse Angling

Source: Ginty 2007, Marine Tourism Product Audit.

Free marine tourism pursuits are defined as water-based activities that are enjoyed at no cost to the user, usually onsite at the location of the coastal or inland waterway area. However, there is

an important economic value attributed to this type of tourist depending on their status whether they are local, domestic or international, they spend money in the area on any of the following; food, drink, accommodation, petrol or other daily needs. There are 29 designated beaches in the West of Ireland in Galway and Mayo offering a 'free marine leisure' experience to visitors and locals. These valuable free tourism resources offer significant economic value to the region if supported and developed by government agents and regional businesses in a sustainable way. In contrast, 'paid marine tourism pursuits' can be defined as water-based activities purchased from a marine tourism business operator per hour, day or by the week. Equipment and tuition is provided or a license is issued by the operator to undertake the activity in the area. To understand the current and future potential of these resources to the local businesses and the West region, investment in research is required, as demonstrated in the various socio economic impact studies discussed in Chapter 2 such as AENP, US Beaches, Malahide Marina or Snowdonia National Park

This study has identified a number of marine tourism product gaps in the West of Ireland that need to be addressed by a marine tourism development authority, with overall responsibility for strategy, funding allocation, product development, business support and marketing promotion. For example there is a need to invest in beach resort facilities and coastal walking/cycling routes right around the coastline. Other gaps include redevelopment of small ports and harbours, as most small ports were originally developed to serve the fishing industry, to facilitate local trade or as a landing place for sea farers. Today, leisure and recreational uses play a critical role and are driving change in small ports and harbours. The factors driving this change include the EU fisheries policy and quotas discussed in Chapter 3 and the need for alternative marine leisure enterprises which can replace fishing businesses and avoid unemployment or displacement. A project financed by INTERREG called SEAWO-MEN in Galicia in Northern Spain (see Chapter 3) has succeeded in redeploying fishermen/women through re-training and re-developing harbours and coastal amenities to focus on marine leisure enterprises. Similar projects in the West of Ireland or other regions in Ireland could provide similar successes.

There is also an absence of visitor marinas along the West Coast. Chapter 4 in the literature review reported that a typical small/medium sized marina (50-80 berths) in a regional location can generate from €380,000 to €800,000 per annum and can support 20-30 full time equivalent jobs. The development of a slipway or pontoon alongside an existing quay in a small port or harbour can transform its usefulness in terms of marine recreation (see image 4.2, Chapter 4). Land-based facilities, such as a sailing or a marine leisure club-house, toilet and shower facilities are equally in demand. Furthermore, there are a number of benefits to be derived from rejuvenation projects based on marine recreation such as a more efficient use of redundant state assets, generation of revenue for small ports and harbours and the catchment area, attraction of additional visitors and investment in the areas and employment creation.

Other much needed product developments in Ireland include 'themed routes' for the inland waterways, inland angling reorganisation around stocks and tourism access, building on Ireland's

distinctive location as Europe's most westerly island, the 'wet and wild', 'adventure', 'escapism' and 'passive' marine based activities. Sea angling access via small piers and harbours on the coastal area is also required and an increase in sea trips/small tourism vessels for marine nature tours. Water themed visitor centres in Mayo and Galway also need new product ideas to attract visitors and the islands need the development of tour packages linked to Irish marine culture. Finally, viewing points and signage or vessels for whale and dolphin watching are poorly provided in the West of Ireland compared to our neighbouring Atlantic competitors, and this needs to be addressed.

It is clear from the literature review (Chapter 2-4) and the marine tourism business findings (Chapter 6) coastal and marine resources throughout Ireland are of great importance to a multiplicity of marine specific tourism businesses and other tourism enterprises, however no single body or agency holds authority or responsibility for the development of marine tourism products including, strategy, planning, funding, business support and promotion. This needs to be addressed by the Irish Government in order to develop and grow the sector long term.

8.3 Person

This study found that over 45% of marine tourism operators' customers in the West of Ireland range from 36-55 years of age. Teenagers have a 16% share and the 19-25 age bracket is lower at just 12%. The 13-25 age groups represent major opportunities for growing the West marine tourism sector. The businesses believe in order to encourage increased participation among the 13-25 user group, future investment is required in marine appreciation and water-based activity education modules introduced at first and second level school as this would improve participation levels and positive awareness of Ireland's natural and valuable water-based recreational assets.

The water-based activities market appears to be segmented into two distinct sub-markets: (i) '*the specialist user*' who books in advance of their trip and comes specifically to engage in the particular water-based activity. One-quarter of overseas visitors surveyed in 2004 came to the West of Ireland specifically to participate in water-based activities. (ii) the '*casual tourist*' or '*general holiday visitor*' who hears about the various water-based activities available in the region upon arrival in Ireland or in the region. He/she may only decide to participate in the water-based recreation at the last-minute. The reasons cited by the casual tourist for visiting the West of Ireland survey include coming to Ireland to holiday (81%), however, a significant proportion of these visitors participated in water recreational activities once they arrived in the West and learned about the wide range of water sport activities on offer to them. This further highlights the opportunistic market that water-based tourism attracts from this market.

The literature review provided few 'Special Interest Tourist Typologies' (SIT), which best describe marine tourism characteristics and motivations. One of the better examples discussed in

Chapter 3 put forward by Brotherton and Himmetoglu (1997) which fits a marine tourist profile includes a 'dabbler' who needs marketing persuasion and then chooses activities depending on their attitude to risk, with their final decision likely to be fashionable or contemporary. The 'enthusiast' seeks new but not overly demanding opportunities to practice interest. The 'expert' has extensive knowledge and skill with the activity and it is central to their life and the focus of their lifestyle. On the other hand the 'fanatic' has an extreme level of involvement with the activity and it dominates their travel choices. In order to encourage more people to engage in water-based activities and move from the dabbler, the enthusiast, the expert or the fanatic, investment and development is required in the product such as coastal and inland waterways supporting infrastructure and improved access to the water (i.e., walkways, cycle routes, berthings, harbour rejuvenation projects, diving access points, mammal watching points).

The behaviour and activities of coastal tourists and recreationalists are vital to understanding their reasons and motivations for choosing a marine tourism product. A variety of marine recreational activities show varying levels of relaxation and excitement. The 'optimal experience theory' discussed in Chapter 3, put forward by Csikszentmihalyi (1975) has relevance to a number of marine recreational activities. Csikszentmihalyi contends that when participants engage in an activity which matches their skill level with the challenge provided by the activity, a psychological state, which he terms being 'in the flow', is achieved. This 'flow' state has also been termed 'peak experience' and studied in risk recreation (Haddock, 1993). These ideas of 'peak experience' or being 'in the flow' and having a need for feelings of competence are of interest in the marine situation, because most marine recreational activities contain an element of challenge and risk and this can be part of the attraction for participants.

As reported in the literature review, water-based tourism participants have traditionally been considered to be dominated by relatively high spenders, who contribute to economic development on a regionally dispersed basis. However, the findings presented in Chapter 6 highlight water-based tourism activities is no longer 'just for the high earner' and is influencing the young market at a much earlier age through primary and second level educational curriculum.

Furthermore, the literature has demonstrated that there is a growing demand for active recreational activities due to a focus on health, leisure and improved lifestyles. An increase in awareness, leisure time or income, will result in greater demands for access to, and facilities for, marine tourism and leisure. All of this has put marine tourism on the brink of rapid expansion. As a result, cruising, sailing and water sports will compete with fisheries, aquaculture and infrastructure development within the coastal zone. The degree of public and government perception of the potential of the marine sector will be critical to the sector's future development in Ireland.

8.4 Policy

This study found that there is currently no single authority that manages, invests, develops and markets the marine tourism sector in Ireland or overseas. The organisational chart presented in Chapter 7 provides an outline of the mix of agents and authorities holding a marine tourism related role. In April 2008, the Department of Community Rural and Gaeltacht Affairs was handed responsibility for the development of the marine leisure sector in Ireland. This Department has no association with the domestic and international marketing function of this product or the legal issues and processes required. Fáilte Ireland is tasked with marketing the Irish portfolio of tourism products to the domestic market and Tourism Ireland on an international level. In contrast, the Department of Transport and Marine has control over the coastal zone of Ireland and its operations and developments. In order to market and develop a product area such as marine tourism effectively, one management authority/department should control all functions in the 'marine leisure product lifecycle' and make appropriate decisions on the investment and development of the sector. The natural home is the Department of Arts, Sports and Tourism which Fáilte Ireland works under. For this to happen it would require restructuring and changing responsibilities of Fáilte Ireland and Tourism Ireland. Better central management of the marine tourism resource would bring cost savings and ultimately grow the sector long term.

Marine resources make a huge contribution to the experience of the general holidaymakers. Therefore marine tourism must fit within the National and Regional Tourism Policy as well as been incorporated in marketing literature. The whole government approach to managing the marine tourism sector must change. There is an obvious need for a national policy and a lead agency with responsibility for marketing and product development, if marine tourism is to reach its full potential. Strategic development and investment plans need to incorporate a range of themed tourism products under a marine tourism agenda. It is recommended that a lead government agency produce an annual product development plan that incorporates a product matrix by County, which identifies product gaps by activity and highlights the investment requirements. It is also important to prioritise business investment by working with Local Authorities and creating suitable conditions to attract investors and public private partnerships (PPP). The plan should also incorporate marketing programmes for each product groups with deliverables, time lines, partners and investment commitments.

There are also a number of actions and strategies necessary to develop this sector further and encourage participation levels in sailing and marine leisure activities from an earlier age such as investing in a primary and secondary education programme as discussed earlier in this Chapter. There is an opportunity for the state to build on the Volvo Ocean Race Schools Programme 2008-2009 (Ginty, 2009, Ocean Adventure Schools Programme www.letsdoitschools.com, see section 8.5). This programme is a legacy initiative of the world ocean race, with the aim of introducing young people in Ireland to the sport of sailing and marine leisure, while encouraging them to think of future careers in the marine industry.

The literature reported that most water-based / marine leisure holidays in Europe today are sold via the Internet (Marine Institute, 2006). Typically, people like to customise their own packages including activities, accommodation and transport. This study found that in 2006, 77% of marine tourism operators had a website and 33% had an online booking system in place. At the time there was little cross-referencing of the sites. Therefore, there is a need for all marine tourism businesses to have a market presence on the Internet with a marine tourism product offering brand and online booking facilities where feasible. There are various grants available to fund the development of such sites but it is up to the individual business to prepare proposals and apply for funds. All business sites should also link to a central marine tourism website which provides a networking point for the businesses to share information, refer customers, book orders between their businesses or sell packages to customers. Fáilte Ireland provides a new Discover Ireland website for all tourism businesses in Ireland, but it does not meet the needs and requirements of the marine tourism sector in order for it to grow and network with other businesses. Setting up a small tourism business web development and support service (including web developers, marketing advisors, and ongoing support officers) financed by the Fáilte Ireland annual promotional budget would prove valuable to this sector. Similarly scheduled 'clinic days' throughout the year for marine tourism businesses, would assist them with business planning, networking and future product ideas.

Other actions include building regional marine tourism brands. Ireland's coastal counties and regions should focus on a particular water-based specialism, for example the West region is positioning itself as 'the adventure sports destination' (as discussed in Chapter 7). County or regional based marine tourism businesses and natural resources (i.e. free marine tourism activities) should then be linked under a national site connected to a leading government body that is responsible for both marketing and product development. This site could also form a vital role in connecting the business sector members and government agents and overseas partners.

Further recommendations include investing in training activities for the marine tourism businesses and the development and roll-out of a 'beach management' plan as current public facilities for beach visitors in Ireland is not linked to best practice from overseas sites. A revamp of the existing Fáilte Ireland 'Exit Survey' is also required to incorporate a marine leisure activity participation section, as this data would form a valuable source of information for strategic product development plans.

The Foreshore Act (1933) is in need of urgent review. The application process is archaic, and lacks transparency (see Appendix 8). There is no fixed time-frame for providing an application outcome, which can take up to 10 years to process, with no appeals process in place. There is no proper public consultation process and unacceptable delays in securing valuations, which currently take up to a year to process. The State Valuation Office is unrealistic in its valuation of the 'sea bed' with rates at €19,500 per acre per annum. Furthermore, a 35-year lease is an unrealistic time frame for potential investors. For example, the development of a marina or

berthing facility requires both planning permission from the local authority and a foreshore lease from the Department of the Marine and Natural Resource. All of these barriers hinder the development of much needed marine tourism infrastructure (i.e. Marinas), which can have a considerable economic impact on a town, city or region as presented in Chapter 2.

As discussed in the literature review, the PESCA Community Initiative was set up in 1994 and ran until 31st December 1999. It complemented the mainstream structural funds and aimed to achieve a number of objectives, such as helping the fisheries sector to adjust to structural changes by providing aid for redeployment of the workforce and diversification into other activities. This included training and the development of tourism, with €6m provided in grant aid for sea angling and tour boats in Ireland. There is evidence of real benefits arising from similarly funded projects in fish dependent areas in Europe such as Northern Spain. However, the Irish Government needs to invest more time and funds in educating the fishing communities in Ireland about the benefits of marine tourism enterprise development, and provide appropriate training to support the diversification of their job roles. The PESCA scheme needs to be revitalised in Ireland and a lead marine tourism development and marketing agency must control the implementation and management of such a programme.

With regards to marine tourism investment, as discussed in Chapter 7, over the past decade the Irish water-based leisure sector has been influenced by the development programmes such as TPDS and NDP (Tourism Product Development Scheme and the National Development Plan). Since 2000, there has been a considerable reduction in the level of NDP investment in marine tourism products. The Operational Programme for Tourism has provided grants to marine leisure projects totalling €5.4m from 2000-2006. Prior to this, the Tourism Operational Programme from 1994-1999 invested €22 million in tourism angling facilities. Other special interest project investments included the Malahide Marina in Co. Dublin, expansion of the inland cruiser fleet and the provision of a network of visitor mooring facilities. These investments totalled to €17 million.

To tackle product development and the direction of funding, a national development strategy for marine and water-based tourism and leisure (2007-2013) has been developed by the Marine Institute, under the guidance of a high level working group with members drawn from key government departments, national and regional tourism agencies and Local Authorities. Product assets and gaps, future scenarios, objectives and funding requirements have been identified in this strategic document. According to the Marine Institute the 2020 Vision for Marine Leisure, a major component of the Irish tourism product suite should include the following main elements:

- Exciting experiences and activities set in a pristine natural environment;
- Strong market recognition for key signature products with wide appeal to holiday makers;
- Fully packaged holidays linked to first class niche products of international repute;
- Integrated web-driven marketing of product themes and clusters.

The 2013 objectives involve increasing domestic and overseas tourism revenue from €630m to €900m by focusing on the development of key signature products that increase demand for holiday experiences in regional/rural Ireland by linking to an international marketing campaign and developing highly attractive niche products. The objectives also include development of innovative approaches for commercial investment in this sector, taking into account the unique situation arising from public ownership of much of the asset (e.g. rivers, foreshore, beaches, harbours etc.). Other areas require support of the development of resource access and management policies, which will lead to the creation of sustainable tourism and recreational opportunities; support of environmental, resource management and protection strategies, which will lead to the optimal use of marine/inland water resources for tourism and leisure. Finally, establishment of a strong marine tourism brand to effectively market marine/water based tourism products and services, which meets agreed national/international standards. This national development plan now needs leadership and management from one state agent to ensure the successful implementation and long term sustainable development of the marine leisure sector.

A summary of the 3P's (Product, Person and Policy) conclusions and recommendations from this study are outlined in Table 8.1 .

Table 8.1: Summary of Findings and Recommendations for the Marine Tourism Sector in the West of Ireland

3P's Evaluation Characteristics	Marine Tourism Sector Regional Outcomes
Marine Tourism Defined	Marine tourism is a leisure experience, which occurs in a natural water-based location including saline, tidally affected or freshwater resources.
Focus of Marine Tourism Business Supply	The core marine tourism businesses are operators who sell marine tourism activity or adventure packages to domestic and international marine tourists. It also includes associate businesses linked to the marine tourism sector who sell marine equipment, such as boat and electronics.
Marine Tourism Business Characteristics	Typically family owner operated, generally small scale, highly seasonal and undercapitalised. - Day packages range from €40-70 - Three day packages start at €365 e.g. diving experience
'Free' Marine Tourism Natural Assets in the Region	Access to Coastal Zone areas such as beaches (approximately 29.) and promenades/walkways/ drive and cycle routes. Examples include: Connemara National Park,

	<p>coastal bird watching</p> <p>shore angling</p> <p>lakes and rivers</p>										
Marine Tourism Product Gaps in the Region	<p>Marinas</p> <p>Beach Resort Facilities such as BBQ and seating areas, changing and shower facilities, boardwalks etc.</p> <p>Inland waterways – themed routes</p> <p>Sea trips/small tourism vessel tours e.g. mammal (what sea mammals are in west of Ireland – dolphins?) watching</p> <p>Water themed visitor centres with new ideas</p> <p>Island tours linked to Irish marine culture.</p> <p>Coastal viewing points</p> <p>Emerging water based activities e.g. kite surfing</p>										
Marine Tourist Characteristics	<p>All ages and both genders.</p> <p>Specialist to Casual User/General Holiday Visitor</p> <p>Range from a Dabbler – an Enthusiast – an Expert – to a Fanatic</p> <p>Typical spend per marine tourist (2004):</p> <table> <tr> <td>Water-sport Activity</td> <td>€32.48</td> </tr> <tr> <td>Accommodation</td> <td>€42.91</td> </tr> <tr> <td>Food & Drink</td> <td>€29.08</td> </tr> <tr> <td>Other</td> <td><u>€12.27</u></td> </tr> <tr> <td>TOTAL</td> <td>€116.74 per day</td> </tr> </table>	Water-sport Activity	€32.48	Accommodation	€42.91	Food & Drink	€29.08	Other	<u>€12.27</u>	TOTAL	€116.74 per day
Water-sport Activity	€32.48										
Accommodation	€42.91										
Food & Drink	€29.08										
Other	<u>€12.27</u>										
TOTAL	€116.74 per day										
Marine Tourist Trends & Future Demand	<p>People seeking adventure and escapism from busy working and family life's.</p> <p>New EU wealth growing.</p> <p>Youth participation through educational programmes therefore long term loyalty to sector.</p>										
Relationship Between Government Bodies & Marine Tourism Business Sector Stakeholders	<p>No leading agency responsible for marketing and product development.</p> <p>Poor communication.</p> <p>Bureaucratic funding procedures.</p> <p>Planning and development laws (i.e. Foreshore Act 1933)</p> <p>Lack of knowledge, networking and information sharing among the sector.</p>										
Core Businesses - Total Income estimate generated by Marine Tourism Operators in the Regional Economy 2006	€24,270,000.										

Total Impact 2006	<p>€35,919,600.</p> <p>Including: Direct Impact €24,270,000. + indirect impact €7,281,000. + induced impact €4,368,600.</p>
Multiplier (Income Multiplier)	<p>Direct 1</p> <p>Indirect 0.30</p> <p>Induced 0.18</p> <p>Marine Tourism Business Operator Multiplier: 1.48</p> <p><i>(i.e. for every one euro spent directly by marine tourists in the region a further .48 cent is generated by secondary effects in the region.)</i></p>
Core Businesses - Marine Tourism Operators Employment Estimates in the Region 2006	<p>394 full-time</p> <p>295 part-time</p> <p>This study found that approx. 10 jobs are supported for every €1 million euro generated by a marine tourism business in the region.</p>
Employment Multiplier	<p>1.4</p> <p>(i.e. for every 1 job directly employed in the region there will be a further .4 indirectly employed)</p>
Total Investment by Government in Marine Tourism in the West in 2006	<p>It is estimated only €1.124m (.7%) was invested in water based tourism enterprises or activities, where Mayo received 81% share of the funds, Galway 15% and Roscommon just 4%.</p>
Fáilte Ireland's Marine Tourism Strategic Goals 2008-2012	<p>Brand West as outdoor capital of Ireland.</p> <p>Invest in adventure events e.g. Volvo Ocean Race.</p> <p>Lobby for/act as advocate for the development of marinas at key locations.</p> <p>Support the feasibility of an artificial reef for diving.</p> <p>Develop angling centres of excellence.</p> <p>Develop Salthill-Barna coastal walk.</p> <p>Utilise the Lakelands approach in East Roscommon and East Galway.</p> <p>Support the feasibility of re-opening the Galway-Clifden railway line as a greenway for walking and cycling.</p>
Marine Tourism Sector Future Development Potential – Policy Recommendations	<ul style="list-style-type: none"> - Appoint a lead agency for the development and marketing of the marine tourism sector in Ireland. - Develop an Internet hub for marine tourism 'one stop information shop' for all stakeholders in order to drive networking and business development. - Invest in educational programmes at primary and secondary level to tackle participation decline, increase awareness and

	<p>interest in marine leisure at an earlier age.</p> <ul style="list-style-type: none"> - Invest in marina developments through public private partnerships. - Revamp the Foreshore Act to encourage business and economic development of the sector. - Revive and restructure the PESCA Scheme. - Invest in beach resort and beach tourism programmes. - Invest in ongoing marine tourism research to support small business development e.g. re-design the exit survey to incorporate the range of products in this 'niche' and evolving growth sector. - Implement the national development strategy for marine and water-based tourism and leisure (2007-2013).
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8.5 Original Contributions

This research study is the first of its kind in Ireland and contributes to the general understanding of the social and economic impact of marine tourism businesses in a region as well as the linkages between the marine tourism businesses and Government agents in Ireland. The original contributions that this research makes to understanding the marine tourism business sector focuses on four specific areas including a research evaluation model, an increased understanding of marine tourism products in the West of Ireland and the small business group, and the potential for developing marine tourism in Ireland and the West of Ireland.

8.5.1 3 P's framework for evaluating the marine tourism business sector

From the literature review three key themes emerged in evaluating the marine tourism business sector including; the marine tourism product, the marine tourist, and policy related to investment and development in marine tourism. From this a research model titled *The 3P's Marine Tourism Business Sector Evaluation Model evolved* (see Chapter 5, Figure 5.1). This model identified the characteristics and capabilities of the marine tourism businesses, established the information needs and appropriate systems required to support the sector, and identified strategic policies that could be adopted by Government to develop and grow the sector long term.

As discussed in Chapter 5, it is important to note that the research findings derived from this model and methodology are specific to the region studied and relate to the marine tourism businesses involved, at the time and place the research was carried out, therefore it may be difficult to draw generalisations. This is why a number of future research opportunities were identified, where this model could be tested and validated in other regions nationally internationally, with similar characteristics.

8.5.2 An increased understanding of marine tourism products in the West of Ireland

The literature review (see Chapter 3 and 4) examined the range of active and passive marine tourism products available in Ireland and overseas and the product gaps. Chapter 6 further presented the marine tourism activity product categories provided by marine tourism businesses in the West region of Ireland. Twenty-six marine related activities were identified in the analysis. The most popular water based activities offered by operators include surfing, canoeing/kayaking, sailing, windsurfing and nature appreciation. This equates to 40% of businesses in the region marketing and selling these range of activities (see Chapter 6, Figure 6.6). Based on 2006 business figures recorded marine tourism product packages range from €40-70 per day and three-day packages start at €365.

This study provides a detailed picture of products available in the region and therefore highlights the importance of this sector and its role in regional tourism. This greater understanding can play a key role in developing strategies and making the right infrastructure investment decisions to support the ongoing development of the marine tourism sector.

8.5.3 An increased understanding of the marine tourism small business group in the West of Ireland.

This research study is the first of its kind in Ireland and contributes to the general understanding of the social and economic impact of marine tourism businesses in a region as well as the linkages between the marine tourism businesses and Government agents in Ireland.

Based on 2006 business figures presented in Chapter 6, the total income generated by the marine tourism operators in the Region is estimated to be €24.27m, with total economic impact equating to €35.919m. The marine tourism business operator multiplier is therefore 1.48. This means that for every €1 spent directly by 'marine tourists' in the region approximately €0.48 was generated by secondary effects in the region. Further more, in 2006, it is estimated that the marine tourism businesses employed approximately 394 people full-time and 295 people part-time and the employment multiplier equates to 1.4. This means that for every 1 job directly employed by a marine tourism business in the West of Ireland there is also .4 jobs indirectly supported.

Therefore the value of the marine tourism sector is underestimated and this is evident by the values discussed in Chapter 6 and the level of investment in the sector discussed in Chapter 7.

8.5.4 The potential for developing marine tourism in Ireland and the West of Ireland.

Ireland's water assets consist of 900,000 sq. km of marine resource compared to 90,000 sq. km of land resource. The marine/water-based tourism and leisure sector has the potential to be one of Ireland's major indigenous industries, which is based on key natural resources consisting of 4,000 miles of high quality coastal waters, 4,000 lakes, 75 major river catchments and over 450 miles of navigable inland waterways (Marine Institute, 2007). These facts combined with the marine tourism business findings presented in this study indicate a need for the State to appoint

a lead government agency to be responsible for marine leisure product development, investment, business support, marketing, policies and regulations relevant to the sector as a whole. Ultimately a clear vision and direction is required in order to capitalise on the Irish marine tourism assets.

Finally, this thesis will be disseminated to academic audiences while it also presents guidelines and ideas to restructure government policies relating to marine tourism in Ireland. For this reason, copies of the thesis will be made available to Fáilte Ireland and the Department of Community, Rural and Gaeltacht Affairs, which currently has responsibility for the marine tourism brief. It is therefore envisaged that the findings from this research study will contribute to the management and future strategic direction of the marine tourism sector on a regional and a national level.

8.6 Study Outcomes

In 2008 an opportunity arose to develop a marine-related schools programme for all primary and secondary schools throughout Ireland. This educational programme was a Galway Stopover Volvo Ocean Race Legacy Initiative. The programme was titled the *Ocean Adventure Schools Programme 2008-2009* (see Appendix 15). The purpose of this new educational programme was to introduce young people to the areas of learning associated with the marine world, including the sport of sailing, climate, technology, geography, history and the marine environment. The materials developed for this comprehensive programme directly related to the knowledge acquired through this PhD research process. A range of materials were developed including: a classroom lesson guidebook; a website; active learning classroom activities; a card game titled *Get Involved*; and weekly lessons in the Irish Independent national newspaper (from January 2009-June 2010). The weekly lessons focused on the geographic location of the Irish team in the Volvo Ocean Race, marine mammals, and other marine interest topics.

The aim of the schools programme was to increase awareness of marine resources among teachers and students and encourage participation in sailing from an early age throughout Ireland. The programme was launched in October 2008 by the Minister for Education Batt O'Keefe and approximately 26,000 children across Ireland participated in the schools programme from October 2008 – June 2009. The schools programme was a great success and demonstrated that marine educational programmes at primary and secondary level can work and drive participation and interest in marine tourism.

8.7 Future Research

The empirical research and literature reviews have highlighted the gaps and the need for further research into a few key areas, which would broaden the understanding of the marine tourism subject area. In particular this study could be replicated in all other regions in Ireland. Following

this, a national picture on marine tourism businesses capabilities, performance and contribution to the economy could be better articulated. A study of this nature could also lead to the development of a new Irish model for managing the marine tourism sector in Ireland effectively, and assist with the restructuring of the roles and control of the marine tourism sector by the Government. This study methodology and model could also be used in an overseas regional market with similar marine tourism characteristics. This would enable research collaborations with overseas institutes and comparative assessments.

Other future research opportunities include an Irish study that would investigate consumer behaviour for different types of marine tourist groups for example 'the surfer', 'the sailor', 'the angler' etc. Also understanding the needs, perceptions and participation patterns of different age groups of marine tourists in each region would enable national and international marketing strategies to be more effective, guide product development and regional planning and investment by the state. This type of study would further enhance the literature on marine tourism and increase interest and appreciation among the tourism reserachers community globally. A study of this type could lead to a comparative study and research collaboration with another third level institute from a 'marine nation' in the Southern Hemisphere such as New Zealand.

There are also further research opportunities to investigate the social and economic impact of marine festival events in Ireland. Approximately 30 festivals of this nature were identified in 2006. As discussed in Chapter Four the Volvo Ocean Race event had a significant impact on Galway, the region and Ireland (Fáilte Ireland, 2009). Studies of this type help build a business case for future investment in marine tourism infrastructure and business development by the state or private enterprises interested in sponsorship opportunities. Similarly investigating the socio-economic impact of natural marine resources (i.e. beaches, national parks) in the region or other parts of Ireland would inform tourism policy development and guide appropriate investment of the tourism budget and also increase the level of investment from its current low levels discussed in Chapter 7.

All of these research opportunities would form interesting studies that would extend the scope of the literature on marine tourism and develop and support the sector better in Ireland or in overseas markets.

8.8 Research Study Reflection

In the process of my PhD viva it was suggested by the external examiners that a PhD is not only about researching a specific topic, but also a personal journey of learning and evaluation of the research process itself. I was encouraged to reflect on my PhD journey and discuss my learning experience in the final Chapter of my thesis.

In June 2004, I returned to Ireland after a year travelling around the world with my husband. Having worked in the private sector in various marketing management roles in the Information Communications Technology (ICT) and aviation industry, I was keen to settle in Galway and change career direction with a view to developing an academic career. I began lecturing part-time for the School of Business in GMIT and in December 2004 a research opportunity arose in the Hotel School to undertake a marine tourism sector business study which was supported through Strand I, Higher Education Authority funding.

I was immediately attracted to the subject area, having grown up beside the sea in Galway city in the West of Ireland and having worked in a tourism business. I felt this was an interesting and worthwhile study, which would inform and influence future academic research, increase understanding and profile of this small business group and drive future policy development of marine tourism in Ireland.

I officially started my research journey in February 1st 2005. From the beginning, the PhD journey has been a process of revelation. I started reading and thinking about the tourism industry and in particular where marine tourism fitted. I questioned the types of products available, the businesses selling these experiences, who was engaging in marine tourism activities in Ireland and why, who was supporting the businesses and the sector development, what was happening in overseas markets, what role did the EU play in supporting and developing the sector, and in particular what type of studies had been undertaken by academics and research institutes on this subject area to date. I also examined a range of research methods and approaches so that I was clear about my objectives and identified the right techniques to tackle my questions. My learning journey then moved on to the design and implementation of a pilot study as discussed in Chapter 5.

My first academic paper opportunity arose in September 2005, when I presented at the Irish Academy of Management conference which took place in Galway. This paper addressed the concept of my research study and pilot study approach. This was a wonderful experience as it gave me an opportunity to present to an academic audience, gain peer feedback on my research methods approach and study objectives, and meet and form connections with academic leaders in the area of tourism, economics and business. The people I met at the conferences went on to play an important role in knowledge transfer and guiding the structure of my thesis. In particular, Dr. Richard Moloney from UCC, Prof. Jim Deegan from UL, Anne Wilkinson from the Marine Institute, Aidan Pender from Failte Ireland, Dr. James Hanrahan from Sligo IT, and Prof. Tom Baum from Strathclyde University.

National and international conference paper presentations played a key role in guiding my development as a researcher, and the depth of knowledge I gained. Key events that I presented at included: the National Marine Institute Research and Innovation Strategy Stakeholder Event in July 2005; the Socioeconomic Diversification in Coastal Communities Conference supported by Aquareg, Seawo-men and INTERREG IIIC in Vigo, Spain, in May 2006; the SICTE, International

Conference on Tourism Economics in Palma, Mallorca in May 2006; the Littoral' International Conference examining Socio-economic Value of Coastal Areas - Regional Coastal Economies, in Gdansk University in Poland in September 2006; the National Annual Tourism and Hospitality Conferences in Waterford Institute of Technology 2006, in Dundalk Institute of Technology 2007, and Tralee Institute of Technology 2008; the 3rd International Critical Tourism Conference, Zadar, Croatia, June 2009. Some of the feedback and questions I received from these events helped shape my direction and approach to the study. For example, at the Spanish conference in 2006, a delegate asked me "Ireland's got bad weather, how do businesses market water-based products?" My response to this question focused on the diversified range of marine tourism products available in Ireland and the advances in wet suit technology, which have enabled access to the water for longer periods in the year, and as a result has extended the tourism season. Simple questions like this made me think about consumer perceptions and how tourists make decisions, marine tourism business characteristics and their product ranges. I also began to think about the importance of building a positive water-based image in Ireland and outside the country to encourage participation. The role of state bodies responsible for developing and marketing our marine tourism offerings, what they do and how they manage this sector is critical in overcoming this barrier. Overall through conference participation, I was listening and learning all the time.

Some highlights during my research journey that motivated me to transition to the next stage included; an award for best tourism paper at the Irish Academy of Management (IAM), 10th annual conference at Queens University in Belfast in September 2007; a submission to the European Commission Maritime Green Paper in 2007; the Fáilte Ireland Scholarship award, which is given to only one candidate in Ireland each year; and the Ireland Newfoundland Partnership which enabled me to travel to Newfoundland in 2007 and 2008 to conduct research and meet with government tourism policy planners and small marine tourism businesses.

There have been a number of challenges encountered during the research process such as the time required to devote to research and writing, and identifying resources and experts with specific knowledge and expertise in the area of marine tourism or small business and regional development. Being the first social science PhD student in GMIT to undertake the thesis development and viva examination process, was challenging and stressful at times. But I worked through it by adopting an attitude of 'learning as I go' and proactively seeking out help from HETAC and any other resources available to me. It was a learning point for me that information and clear guidelines and requirements for PhD students are not always available in an accessible way, and this is an area I would like to develop for future graduate students.

Despite the challenges encountered, I pursued the research plan with great enthusiasm and energy and continued to network and seek guidance and support from experts in other third level colleges, government bodies, the marine tourism businesses and specialist research organisations in Ireland and overseas. Also by meeting with other PhD students outside GMIT, I learned that I was not alone and most of us shared similar stories of self-direction, working alone and figuring out problems and solutions. This, I believe, is all part of the PhD learning journey.

Other research opportunities that arose during this study involved the development of a tourism plan for the island of Inishbofin on the West Coast of Ireland. This study involved surveying visitors to the island on marine tourism participation and the small businesses on their challenges and future goals. As a result this further developed my research skills. In May 2008, I was approached by the 'Volvo Ocean Race' organisers to design and develop a 'schools programme' for primary and secondary schools throughout Ireland. This was a very exciting project to work on, as I developed materials directly related to the knowledge which I had acquired through my PhD study. I named the programme the 'Ocean Adventure Schools Programme' and the materials included a classroom lesson guidebook, a website, active learning classroom activities and games. The aim of the schools programme was to increase awareness of marine resources and encourage participation in sailing from an early age throughout Ireland. Approximately 26,000 children across Ireland participated in this programme, and I am particularly proud of this achievement. It also proves that experiential teaching and learning programmes in this subject area can drive participation and appreciation of marine resources.

Although the PhD presented a number challenges it has been really enjoyable and it enabled me to develop my knowledge and practical understanding of academic research such as analytical and critical thinking abilities, academic writing and publications, knowledge, and a detailed understanding on the marine tourism and the businesses that operate in this sector. From an academic career perspective the PhD journey has influenced my direction into a new role I started in GMIT in 2008, which involves the management of student led learning and curriculum reform initiatives and collaborations with the National University of Ireland Galway and Athlone Institute of Technology. The range of projects involve a Peer Assisted Learning (PAL) programme, a new module manager MIS system, a civic engagement offering, and a range of activities to support the development of teaching, learning and assessment at GMIT. All of these initiatives will have a positive impact on the first year experience and inform change particularly in relation to how the Institute manages its programmes and supports its students in their learning.

The viva examination in May 2009 was a wonderful opportunity to focus on what I had done and talk about my findings and research journey. It was a stressful but an invigorating experience. Both external examiners challenged me in every aspect of the thesis. The outputs and requirements from the viva has matured my mind and ultimately enhanced the thesis and overall structure. I am very thankful for the comprehensive feedback and guidance provided by the external examiners. Finally, this PhD learning journey has opened many doors for me and will continue to play an important role as I move further in my academic career. Once the PhD process is over I will continue to develop as a researcher, an academic author, a project manager and an educator in the field of business, tourism and teaching and learning.

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Appendix 1 Published Papers, Publications, Awards & Conferences

Throughout the PhD research journey there were a number of opportunities to present papers at conferences and gain peer review on the research process. In addition an educational tool pack was developed for primary and secondary schools throughout Ireland to support the Volvo Ocean Race visit to Ireland in 2009. The outputs from this PhD thesis are as follows:

- In 2005, conference presentations titled 'An analysis of the marine tourism industry in the West of Ireland' took place in Ulster University National Tourism Research Conference June 2005, National Marine Research and Innovation Strategy Stakeholder Event July 2005, Marine Institute International Conference in Dublin September 2005.
- In September 2005, published and presented a concept paper on 'An Economic Analysis of Marine Tourism Activities in the West of Ireland' at the IAM, Irish Academy of Management Conference at GMIT.
- In May 2006, I was invited to present at an International Conference in Vigo, Spain on the Socioeconomic Diversification in Coastal Communities supported by Aquareg, Seawo-men and INTERREG IIIC. Also in May I participated at SICTE, International Conference on Tourism Economics in Palma, Mallorca.
- In June 2006, presented and published a paper on 'A Business Analysis of Marine Tourism Sector in the West of Ireland' at the 2nd Annual Tourism & Hospitality Conference in Waterford Institute of Technology.
- In September 2006, published a paper and poster at Littoral International Conference examining Socio-economic Value of Coastal Areas - Regional Coastal Economies, which took place in Gdansk University in Poland.
- In September 2006, I was awarded the Fáilte Ireland Scholarship award to support my PhD research programme. The scholarship award is given to only one candidate in Ireland each year.
- In December 2006, I was awarded a research fund from the Ireland Newfoundland Partnership with the Dept. of the Taoiseach to conduct a comparative study in Newfoundland in partnership with the Newfoundland University, the Marine Institute and Newfoundland's Department of Tourism. This fieldtrip took place in June 2007.
- In March 2007, completed a submission to the European Commission Maritime Green Paper.
- In June 2007, presented and published a paper titled 'An evaluation of the performance of businesses in Roundstone, a seaside coastal village in the West of Ireland' at the 3rd annual Tourism Research Conference held in Dundalk Institute of Technology.
- In September 2007, I received the Irish Academy of Management (IAM) 'Best Paper Award' at their 10th annual conference in Queens University in Belfast.
- In September 2007, ATLAS annual conference 2007, 'Destinations revisited perspectives on developing and managing tourist areas', Viana do Castelo, Portugal, paper published in stream on 'Determinants of destination attractiveness and repeat visitation', paper titled 'The impact of free marine leisure activities on a seaside business community'.
- In August 2007, 'Inishbofin Tourism Development Plan 2007-2010', published by the West of Ireland Centre for Tourism and Hospitality Research Centre (WITHRC), GMIT, by Carina Ginty and Maria Murphy, financed by LEADER, Ireland.
- In June 2008, paper published at Tralee IT at the 4th annual Tourism Research Conference on 'An evaluation of the marine tourism sector in Newfoundland versus Ireland'.
- In September 2008, paper and presentation at the Irish Academy of Management (IAM), 11th annual conference in Dublin City University, paper titled 'An Evaluation of the Marine Tourism Sector in Newfoundland, Canada versus Ireland'.
- In September 2008, I was commissioned by the Volvo Ocean Race to develop a schools programme titled the 'Ocean Adventure Schools Programme 2008-2009'. This programme was aimed at primary and secondary school teachers and students throughout Ireland, to increase awareness of marine resources and encourage participation in sailing from an early age. This programme was supported by the Department of Education.
- In June 2009, published paper and presented at 3rd International Critical Tourism Conference, in Zadar, Croatia, Paper titled 'An examination of the marine tourism business operators in the West of Ireland'.

Note: all papers and publications are available in a separate CD-ROM or by emailing carina.ginty@gmit.ie

Appendix 2

Case Study: Marine Tourism Newfoundland and Labrador

In June 2007, a study trip to Newfoundland was undertaken by the author. It was supported by the Ireland Newfoundland Partnership and investigated Newfoundland's marine tourism capabilities, sector performance and management. The findings discussed below represent a snap shot of the marine tourism sector in the Province of Newfoundland and Labrador. The development of this case study enabled the researcher to gain an international picture on how marine tourism was supported and managed in an international Atlantic site. This has been presented in a conference paper. In addition best practice approaches deployed in Newfoundland have helped inform the researchers' recommendations for Ireland in this thesis (i.e. restructuring the Fáilte Ireland Exit Survey).

About Newfoundland and Labrador: The most eastern province in Canada is made up of the island of Newfoundland and Labrador which is on the mainland of Canada. Newfoundland is the youngest Canadian province, joining Canada in 1949. The island of Newfoundland is at the mouth of the Gulf of St. Lawrence, with the Atlantic Ocean on the north, east and south. It is separated from Labrador by the Strait of Belle Isle. Labrador is on the northeastern tip of the Canadian mainland, with Quebec to the west and south, and the Atlantic Ocean down to the Strait of Belle Isle on the east. The northern tip of Labrador is on the Hudson Strait (see map 2 below). In Newfoundland and Labrador, Canada, the tourism industry is managed by the Department of Tourism, Culture and Recreation (TCR).

Area of Newfoundland and Labrador:

405,212 sq. km (156,453 sq. miles) (Natural Resources Canada, 2001)

Population of Newfoundland and Labrador:

505,469 (Statistics Canada, 2006 Census)

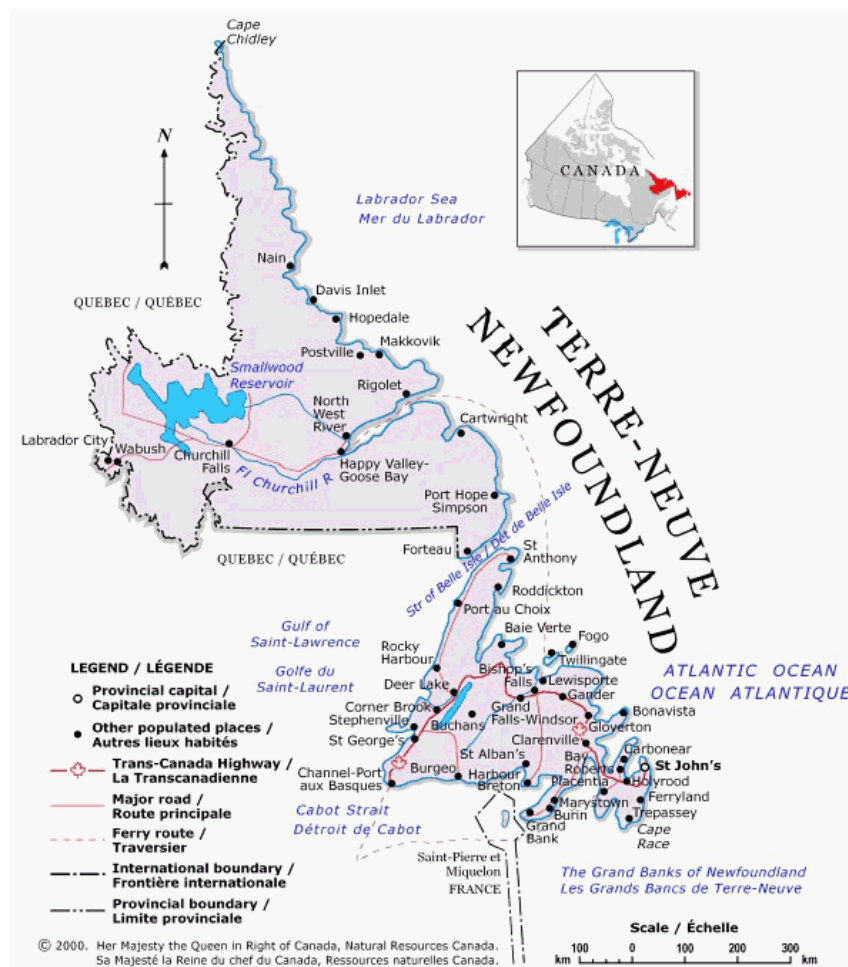
Capital City of Newfoundland:

The capital of Newfoundland and Labrador is St. John's.

TCR Marine Tourism Definition: According to the TCR, marine tourism can be defined as a range of tourism, leisure and recreation activities that take place in the marine environment including coastal zones and estuaries, the near-shore and offshore ocean waters.

Province Unique Selling Propositions (USPs): Newfoundland visitors come to see the dramatic natural setting including ocean, seacoasts, icebergs, abundant wildlife such as whales and seabirds, and unique culture and heritage including historic communities, festivals and the arts.

The Province of Newfoundland & Labrador:



Source: Copyright @2007 listingsca.com

Overall Tourism Sector Performance: Tourism spending in Canada totalled \$62.7 billion in 2005, a 7.2 % increase compared to 2004. In 2000 (the last reference year available) tourism activity in Newfoundland and Labrador generated an estimated \$173 million in Gross Domestic Product (GDP) or 1.8% of the economy. In 2004, estimated resident and non-resident direct expenditure were approximately \$840 million. Hospitality Newfoundland and Labrador (regional tourism businesses support body) estimates that tourism in 2007 currently supports 2,500 businesses and employs, directly or indirectly, 47,000 people spread throughout the Province. In 2006, there were an estimated 494,400 non-resident visits to Newfoundland and Labrador generating \$365 million in tourism revenue, which represents an increase of 8.3% over the same period in 2005.

Tourism Market Trends: The national and international marketplace is becoming more challenging and competitive in terms of number of visitors. Outdoor Nature/Eco-tourism accounts for a larger proportion of international clients. The number of nature, adventure,

marine tourists, as well as eco-tourists, is growing significantly worldwide. Marine tourism, marine ecotourism and coastal tourism development are highly competitive international sectors as nations and provinces actively seek to draw increased numbers of visitors and increased earnings to their coastal destinations. The US government has ranked marine-based tourism and the lure of coastal destinations as the largest single growing segment in the outdoor/nature market.

Visitor Motivational Factors: The top factors which motivated non-resident visitors to tour the Newfoundland province are mainly marine related: nearly 90% of both air and auto visitors came because of the sea coast, ocean, whale watching, and iceberg viewing. Other top factors included visiting national and provincial parks (most of them marine-based), national and provincial historic sites and historic outport communities – nearly all of which are related to the Province’s oceans and marine environment and culture.

Marine Participant Characteristics: The largest percentage of non-resident visitors who participate in marine-based activities are from Ontario. Marine participants to the Province are more likely to be visiting for vacation/pleasure reasons and a higher percentage report a household income of \$100,000 CAD or more. Per party expenditure stands at \$1,594 and per person expenditures at \$884 are also higher than average than for the general non-resident visitor. Therefore marine participants are lucrative, high-spending leisure visitors who stay longer.

Regional/Rural Impact: The TCR see the development of marine ecotourism as an opportunity to help regenerate coastal communities that are experiencing economic hardship as a result of the decline of traditional economic sectors, namely fishing. Table 6 illustrates the marine tourism assets and operators who play a key role in the development of the sector in Newfoundland.

Table: Newfoundland and Labrador Marine Tourism Assets and Operators 2006

Marine Tourism Operation	Province-Wide	Avalon	Eastern	Central	Western	Labrador	Total by Type
Iceberg Watching	2	9		3	2	2	18
Whale Watching	2	13	2	3	4	2	26
Sea Kayaking	4	6	6	8	8	1	33
Birdwatching		1	2		3		6
Boat Tours and Charters*							69*
Diving/Scuba	2	2		1			5
Recreation/Sport Fishing**					6	13	19
Coastal/Expedition Cruise***	1						1
Marinas/Yacht Clubs		6	2	5	1		14
Sailing Expeditions	1****						1
Natural History Operators	5	5	2	4	10	3	29
Marine Learning Tours/Learning Vacation		4	1		1		6
Total by Region		45	15	24	35	21	227*

Source: Tourism Destination Management Information System, Department of Tourism, Culture and Recreation, January 2007; Tourism Information Manual.

Notes: *There are 69-70 boat tours including zodiacs. Many of these are captured under iceberg watching, whale watching and seabird watching. This means that there is an overlap in the total number of marine-based tourism operators in the Province.

**This includes only marine-based (ocean) and are mainly Arctic Charter outfitters.

***This does not include the large cruise ships which come to the province annually but are owned and operated off shore.

****Expeditions to Western Newfoundland and Labrador.

Recent Product Innovations: Combining marine adventure and heritage include vacation homes and coastal cottage development/rentals using heritage or character properties, diving/scuba underwater tours and Iceberg Finder®, a partnered website on location and viewing icebergs. Marine tourism operator awards for quality and sustainability of product offerings, have also worked well in marketing the Province.

Product Development Priorities: An Economic Planning Group 2004 report 'Special People, Special Place: The Future of Tourism in Newfoundland and Labrador ranked the Province's top priority travel influencers as largely marine based. These were;

- 1) Icebergs and Whale Watching
- 2) Gros Morne National Park
- 3) Cape St. Mary's Ecological Reserve
- 4) Witless Bay Ecological Reserve
- 5) Other Ecological Reserves such as Mistaken Point and Burnt Point.

Secondary and supporting demand influencers included coastal hiking, outdoor adventures and outfitting (including hiking and sea kayaking); lighthouses; Terra Nova National Park; special interest products such as seabirds and; expedition-style cruising.

Image: Iceberg off the East Coast of Newfoundland at St. John's.



Source: Ginty, June 2007.

Image: Marine Tourism Operator *O'Briens Tours*, Bay Bulls, Newfoundland.



Source: Ginty, June 2007.

Newfoundland and Labrador Strengths, Weaknesses, Opportunities & Threats

(SWOT) Analysis:

S

- Marine Ecotourism Occuring in Province for some time
- Excellent Marine Resources
- Existing Infrasturcture (wharfs & boats)
- Human resources with marine experience
- Extensive marine inventory completed
- Leveraging a growth market

O

- Develop an integrated marine ecotourism strategy
- Provincial Government committed to develop Oceans Action Plan – linked to Federal strategy. The development of a marine eco-tourism strategy could influence a policy framework for oceans and coastal resources.
- Build on Province as a marine destination
- Work with established tourist destination to develop/incorporate marine eco-tourism as another attraction.

W

- Development has been ad hoc
- Saleable marine tourism products unidentified

T

- Tourist bad experience – negative PR/media
- Need for better public and private sector tourism planning and partnership
- Lack of market awareness
- Density/USPs. In some areas there are too many operators offering the same product.
- Marine tourism operators who do not adhere to any established code of conduct.
- Development continues without plan, product or poor quality.

Source: Ginty, 2008

Appendix 3

Sample Marine Tourism Business Operator Survey

Part A. Letter



GMIT
West of Ireland Centre for Tourism and
Hospitality Research,
Dublin Road,
Galway,
Ireland.
Telephone: 091 742423
Website: www.gmit.ie

XYZ Marine Tourism Business
Co. Galway, Mayo or Roscommon

Date:

Dear Marine Tourism Business XYZ,

I'm currently conducting a study on the performance, capabilities and economic contribution of marine tourism businesses in the West of Ireland. This study is supported by Fáilte Ireland and the Marine Institute. The marine tourism and leisure sector has the potential to be one of Ireland's major indigenous industries, which is based on key natural resources consisting of 4,000 miles of high quality coastal waters, 4,000 lakes, 75 major river catchments and over 450 miles of navigable inland waterways.

To date no regional economic data on marine tourism businesses exists and the impact they have on the economy. Your participation in this study will provide a greater understanding of the products and overall performance of the marine tourism business sector in the region and will therefore strengthen the case for marine tourism investment and development in the West of Ireland

Please find enclosed a copy of the marine tourism business questionnaire. The following completion options are available:

Option 1: Complete questionnaire attached and return in stamped address envelope enclosed.

Option 2: Complete questionnaire online – follow online link details attached

Option 3: Complete questionnaire via phone interview

Option 4: Face to face scheduled on site interview.

I will be in touch with you shortly to discuss the completion options above. In the meantime if you have any questions please do not hesitate to contact me at 091 742423 or 087 9446418 or email carina.ginty@gmit.ie

I appreciate your support and I look forward to talking to you soon.

Yours sincerely,

Carina Ginty,
West of Ireland Centre for Tourism and Hospitality Research, GMIT.

Part B. Survey

Marine Tourism Operator Survey

1. Marine Tourism Sector - Business Survey - Share Your Views & the Value...

This study is supported by Failte Ireland, the Marine Institute and GMIT Centre for Tourism and Hospitality Research. To date 60% of marine tourism businesses in the region have participated in this study. Your business is one of the final few to participate in this study.

The findings from this survey feed into 'a larger impact model' which examines the total value of the marine tourism businesses in the West of Ireland. This study will highlight the importance of the marine tourism sector to the region and will strengthen the case for marine tourism investment and development in the West of Ireland (including Galway, Mayo and Roscommon).

This survey takes approximately 10 minutes of your time. Please complete and submit online or call Carina Ginty at 091 742423 for assistance. I can also be contacted by email email carina.ginty@gmit.ie.

*** 1. What is the name of your Business?**

*** 2. Where is your business located?**

- Galway
 Mayo
 Roscommon

*** 3. What year did your business open?**

4. Has your product/service offerings changed since opening?

Marine Tourism Operator Survey

*** 5. Please tick what your business offers for sale?**

- Boat Charter
- Canoeing/Kayaking
- Cruising
- Diving
- Fresh Water Angling
- Sea Angling
- Island Ferries
- Jet Ski Charter
- Marina - Fresh Water
- Marina - Sea Base
- Mammal Watching
- Safari
- Sailing
- Surfing
- Windsurfing
- Water Theme Visitor Centre
- Holiday Accommodation
- Marine Mammal Watching Tours
- Aquarium Visitor Centre
- Maritime Museum
- Beaches & Coastal Camping
- All Main Marine Tourism Activities (i.e a marine adventure tourism centre providing surfing, canoeing, windsurfing, instruction etc.)
- Marine Maintenance/Engineering Services
- Other

6. If your business offers 'Other' items for sale please specify?

7. What are the most popular water-based activities emerging? (i.e. New water based activity products or existing activities that are becoming more popular)

8. Do you have someone responsible for selling & marketing your business?

- Yes
- No

9. If 'Yes' to question 8. does this person have responsibility for other areas of the business?

- Yes
- No

Marine Tourism Operator Survey

* 10. How much time is allocated to selling and marketing your business on a typical week?

- Under 7 hours
 1 - 2 Days per week
 2 - 4 Days per week
 4 - 5 Days per week
 7 Days a week

* 11. Do you have a website

- Yes
 No

12. If Yes to question 11, can you take orders online?

- Yes
 No

* 13. Do you share information with other marine tourism operators in your region?

- Yes
 No

14. If Yes to question 13, what type of information do you share?

* 15. Do you receive regular communications from state/ government agencies/ or marine clubs/associations?

- Yes, regularly
 Sometimes
 Never

16. If Yes in question 15, what type of communications and from whom do you receive it from?

* 17. Do you advertise your business and if so, where (name of publication, website etc.)

* 18. Where do your sales leads/enquires to your business come from? (e.g word of mouth, association, website etc..)

* 19. Do you ever book marine tourism activities with other operators in the region on behalf of a customer?

- Yes, regularly
 Sometimes
 Never

Marine Tourism Operator Survey

*** 20. Do you contribute marketing funds to a group or association? (e.g. Failte Ireland Regional Marketing Fund)**

- Yes, a Marine related Consortium
 Yes, a State Agency
 No

21. If yes to question 20, what benefits do you receive from the marketing contribution?

*** 22. Please specify any other ways you market and sell your business?**

*** 23. What customer groups do you sell to ? (please type yes or no to any or all of the options below)**

Local Users

Visitors from the Region

Visitors from the rest of Ireland

Marine Tourism Businesses

International Visitors

Other, please specify

24. Where are your customers coming from ? - please rank from 1-5 (No. 1 being the biggest customer group and No. 5 being the smallest customer group) e.g. of customer groups can include US, France, Spain, Northern Ireland, Dublin, etc.

1.

2.

3.

4.

5.

*** 25. What is the average typical spend per day in euro€ of a marine tourist you sell activities/services to?**

Day Tripper/ Walk in

Day Trade €

Staying Visitor/Tour Package €

*** 26. What is the average number of days spent by a typical staying visitor/tour package?**

*** 27. What are the most popular/best selling products or services offered by your business? (Put in order 1-5, 1 being the most popular).**

1.

2.

3.

4.

5.

Marine Tourism Operator Survey

* 28. Please indicate category (or categories) of ownership and management most applicable to your operation:

- Owner Managed
 Family Run
 Partnership
 Subsidiary or Part of a Group

* 29. Do you have other businesses, if Yes what is the name and activity of the other business?

30. If yes to question 29, is one business dependent on the other?

- Yes, regularly
 Sometimes
 Never

* 31. How many months of the year do you operate your business?

32. Please rank the best performing seasons in order 1-4 (1 being the most successful)

Spring Feb-April	<input type="text"/>
Summer May-July	<input type="text"/>
Autumn Aug-Oct	<input type="text"/>
Winter Nov-Jan	<input type="text"/>

33. Please indicate if you have received any grant support over the past four years and area of investment it relates to

	Yes/No	Support Agency	€ amount	Investment Area
2006	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2005	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2004	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2003	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

* 34. Please indicate total turnover and total expenses of your business from 2003-2006

	€ Total Turnover	€ Total Expenses
2003	<input type="text"/>	<input type="text"/>
2004	<input type="text"/>	<input type="text"/>
2005	<input type="text"/>	<input type="text"/>
2006	<input type="text"/>	<input type="text"/>

Marine Tourism Operator Survey

* 35. Please indicate your business top five expenses in 2006 and the suppliers business location

	Expense Type	Location of Supplier	€ Total Cost of each Expense in 2006
Expense 1.	<input type="text"/>	<input type="text"/>	<input type="text"/>
Expense 2.	<input type="text"/>	<input type="text"/>	<input type="text"/>
Expense 3.	<input type="text"/>	<input type="text"/>	<input type="text"/>
Expense 4.	<input type="text"/>	<input type="text"/>	<input type="text"/>
Expense 5.	<input type="text"/>	<input type="text"/>	<input type="text"/>

* 36. In 2006, how many people did you employ?

Full-Time	<input type="text"/>
Part-Time	<input type="text"/>
Casual	<input type="text"/>

37. Do you have plans to expand your business in the future?

- Yes
 No

38. If yes to question 37, what is the current status of your plans?

* 39. Please indicate the main operational problems/issues facing YOUR BUSINESS? (Please tick only those that concern you most)

- Staff Shortages
 Staff Retention
 Fuel Costs
 Insurance Costs
 High Cost of Labour
 Cannot get adequately trained staff
 Cost of leasing facilities
 Limited time to focus on business planning
 Equipment/ Stock Costs
 Limited Marketing/Promotion Budget
 Slower growth in regional demand
 Stealing Stocks
 Other

Marine Tourism Operator Survey

*** 40. Please indicate the main challenges facing YOUR MARINE TOURISM SECTOR? (Please tick only those that concern your industry sector most)**

- Labour cost inflationary pressures
- Access - poor road network/traffic
- Overseas Businesses
- Competition Overseas
- Access to information
- Signage
- Access to development and support grants
- Climate
- Lack of Marina Network on the West Coast
- High price levels in Ireland
- Marine related legislation
- Marine Licensing
- Marketing the West as a Marine Tourism Destination of Excellence
- State Support Organisation Communication
- Product Gaps in the Marine Tourism Provision in the West
- Visitor Perceptions
- Other

*** 41. In order of priority, what do you see as being the TOP THREE CHALLENGES confronting your business and marine tourism industry sector?**

1.
2.
3.

42. Please submit any further comments you would like to make. Thank you for your time and input to this valuable research study. This study will raise the profile of marine tourism industry in Ireland and particularly the value and importance of this sector to the West of Ireland's regional economy.

Sample Marine Tourism Associate Business Survey

Marine Tourism Associate Business Survey

1. Marine Sector Business Survey - Share Your Views & the Value of Your S...

This study is supported by Failte Ireland, the Marine Institute and GMIT Centre for Tourism and Hospitality Research.

The findings from this survey feed into 'a larger impact model' which examines the total value of the marine tourism businesses in the West of Ireland. This study will highlight the importance of the marine tourism sector to the region and will strengthen the case for marine tourism investment and development in the West of Ireland (including Galway, Mayo and Roscommon).

This survey takes approximately 10-15 minutes of your time. If you have any questions in relation to this study please contact Carina Ginty at 091 742423 or email carina.ginty@gmit.ie.

* 1. What is the name of your Business?

* 2. Where is your business located?

- Galway
 Mayo
 Roscommon

* 3. What year did your business open?

4. Has your product/service offerings changed since opening?

Marine Tourism Associate Business Survey

* 5. Please tick what your business offers for sale?

- Marine Maps
- Jet Skis
- Outboards
- Surf Boards
- Surf Gear
- Windsurfing Equipment
- Fishing Gear & Tackle
- Fishing Licenses
- Boats/Sailing Vessels
- Boat Engines
- Water Skis
- Aquarium Equipment
- Canoes
- Diving Equipment
- Diving Suits
- Marine Maintenance/Engineering Services
- Other

6. If your business offers 'Other' items for sale please specify?

7. Do you have someone responsible for selling & marketing your business?

- Yes
- No

* 8. If 'Yes' to question 7. does this person have responsibility for other areas of the business?

- Yes
- No

* 9. How many hours are allocated to selling and marketing on a typical week? (i.e. opening hours of sales shop etc.)

* 10. Do you have a website

- Yes
- No

11. If Yes to question 10, can you take orders online?

- Yes
- No

Marine Tourism Associate Business Survey

* 12. Do you share information with other marine business providers in your region?

- Yes
 No

13. If Yes to question 12, what type of information do you share?

* 14. Do you receive regular communications from state/ government agencies/ or marine clubs/associations?

- Yes, regularly
 Sometimes
 Never

15. If Yes in question 14, what type of communications and from whom do you receive it from?

* 16. Do you advertise your business and if so, where (name of publication, website etc.)

* 17. Where do your sales leads/enquires to your business come from? (e.g word of mouth, association, website etc..)

18. Do you ever book marine tourism activities with providers in the region on behalf of a customer?

- Yes, regularly
 Sometimes
 Never

* 19. Do you contribute marketing funds to an group or association?

- Yes, a Marine related Consortium
 Yes, a State Agency
 No

20. If yes to question 19, what benefits do you receive from the marketing contribution?

21. Please specify any other ways you market and sell your business?

* 22. What customer groups do you sell to ? (please type yes or no or other specify)

Local Marine Users	<input type="text"/>
Marine Tourists	<input type="text"/>
Local Householders	<input type="text"/>
Marine Tourism Businesses	<input type="text"/>
Gov./State Agencies	<input type="text"/>
Boaters	<input type="text"/>
Other, please specify	<input type="text"/>

Marine Tourism Associate Business Survey

23. What marine tourism businesses in the West of Ireland do you sell your product or services to ? (e.g. Scuba Dive West, Diving Centres, Killary Adventure Centre)

24. What is the average typical spend per year in euro€ of a marine tourism business you supply to in the West of Ireland?

* 25. What are the most popular/best selling products or services offered by your business? (Put in order 1-5, 1 being the most popular).

1.	<input type="text"/>
2.	<input type="text"/>
3.	<input type="text"/>
4.	<input type="text"/>
5.	<input type="text"/>

* 26. Please indicate category (or categories) of ownership and management most applicable to your operation:

- Owner Managed
 Family Run
 Partnership
 Subsidiary or Part of a Group

27. Do you have other businesses, if Yes what is the name and activity of the other business?

28. If yes to question 27, is one business dependent on the other?

- Yes, regularly
 Sometimes
 Never

* 29. How many months of the year do you operate your business?

30. Please rank the best performing seasons in order 1-4 (1 being the most successful)

Spring Feb-April	<input type="text"/>
Summer May-July	<input type="text"/>
Autumn Aug-Oct	<input type="text"/>
Winter Nov-Jan	<input type="text"/>

31. Please indicate if you have received any grant support over the past four years and area of investment it relates to

	Yes/No	Support Agency	€ amount	Investment Area
2006	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2005	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2004	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2003	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Marine Tourism Associate Business Survey

* 32. Please indicate total turnover and total expenses of your business from 2003-2006

	€ Total Turnover	€ Total Expenses
2003	<input type="text"/>	<input type="text"/>
2004	<input type="text"/>	<input type="text"/>
2005	<input type="text"/>	<input type="text"/>
2006	<input type="text"/>	<input type="text"/>

* 33. Please indicate your business top five expenses in 2006 and the suppliers business location

	Expense Type	Location of Supplier	€ Total Cost of each Expense in 2006
Expense 1.	<input type="text"/>	<input type="text"/>	<input type="text"/>
Expense 2.	<input type="text"/>	<input type="text"/>	<input type="text"/>
Expense 3.	<input type="text"/>	<input type="text"/>	<input type="text"/>
Expense 4.	<input type="text"/>	<input type="text"/>	<input type="text"/>
Expense 5.	<input type="text"/>	<input type="text"/>	<input type="text"/>

* 34. In 2006, how many people did you employ?

Full-Time	<input type="text"/>
Part-Time	<input type="text"/>
Casual	<input type="text"/>

35. Do you have plans to expand your business in the future?

- Yes
 No

36. If yes to question 35, what is the current status of your plans?

Marine Tourism Associate Business Survey

*** 37. Please indicate the main operational problems/issues facing YOUR BUSINESS? (Please tick only those that concern you most)**

- Staff Shortages
- Access to the Water
- Staff Retention
- Fuel Costs
- Insurance Costs
- High Cost of Labour
- Cannot get adequately trained staff
- Cost of leasing facilities
- Limited time to focus on business planning
- Equipment/ Stock Costs
- Limited Marketing/Promotion Budget
- Slower growth in regional demand
- Stealing Stocks
- Other

*** 38. Please indicate the main challenges facing YOUR MARINE SECTOR? (Please tick only those that concern your industry sector most)**

- Access to the Water
- Labour cost inflationary pressures
- Access - poor road network/traffic
- Overseas Businesses
- Internet Businesses outside the region or overseas
- Access to information
- Signage
- Access to development and support grants
- Climate
- Lack of Marina Network on the West Coast
- High price levels in Ireland
- Marine related legislation
- Marine Licensing
- Marketing the West as a Marine Tourism Destination of Excellence
- State Support Organisation Communication
- Product Gaps in the Marine Tourism Provision in the West
- Visitor Perceptions
- Other

Marine Tourism Associate Business Survey

* 39. In order of priority, what do you see as being the TOP THREE CHALLENGES confronting your business and marine industry sector?

1.
2.
3.

40. Please submit any further comments you would like to make. Thank you for your time and input to this valuable research study. This study will raise the profile of marine tourism industry in Ireland and particularly the value and importance of this sector to the West of Ireland's regional economy.

Appendix 5

Marine Tourism Operator Business

Database

Operator Business Name	Address 1	Address	Address	Address 4	Email	Phone	Website
A.J Topsail 'Connemara Rose'	Cashel			Co. Galway			
Achill Island Scuba Dive Centre	Purteen Harbour	Keel	Achill	Co. Mayo	joseph@achilldivecentre.com	087 2349884	www.achilldivecentre.com
Achill Outdoor Education Centre	Cashel		Achill	Co. Mayo	info@achilloutdoor.com	098 47304, 098-47253	www.achilloutdoor.com
Angling Services Ireland	4 Tobar Padraic Termon Road,		Boyle,	Co. Roscommon	info@angling-services-ireland.com	071 9663660	www.angling-services-ireland.com
Angling Wave Hoper Boats	2 Kilkerrin Park	Liosban Ind. Est.		Co. Galway		091 769974	
Aran Direct	Rossaveal Harbour	Rossaveal,		Co. Galway	kmyth@arandirect.com		www.arandirect.com
Aran Island Ferries	4 Foster Street			Co. Galway	islandferries@eircom.net	091 568903	www.aranislandferries.com
Aran Islands Dive Centre		Aran Islands,		Co. Galway	info@scubadiveireland.com , nick@scubadiveireland.com	099-73134	www.scubadiveireland.com
Atlantaquaria	Salthill			Co. Galway		091 585100	www.nationalaquarium.ie/showEventItem.php?id=27
Atlantic Adventure Centre	Lecanvey	Westport		Co. Mayo	atlanticadventurecentre@eircom.net	098 64806, 087 6977341	
Bayview Angling Centre	Derry Quay Cross,	Cong,		Co. Mayo	bawiewac@eircom.net	094 9546385	
Belmullet Dive Centre & Dive West Ireland	Surgeview,	Blacksod	Belmullet	Co. Mayo	seanlavelle@eircom.net	(0)97 81335	www.divewestireland.com
Belmullet Sailing Club	The Square, Belmullet,			Co. Mayo	minallen@eircom.net	097 82093	
Bow Waves	Galway Bay Sailing Club			Co. Galway	nfo@bowwaves.com	(091) 560 560	www.bowwaves.com
Burke Boats	Castlebar Rd, Ballinrobe,			Co. Mayo			
Camillaun Lodge & Angling Centre	Oughterard,			Co. Galway	camillaun@eircom.net	091 552678	www.camillaun.com
Carra Boat Hire	Ballinaleeka, Castlebar,			Co. Mayo	info@carraboathire.com	94-9030879	www.carraboathire.com
Clew Bay Sea Angling	Clynish View, Derradda,		Newport	Co. Mayo	info@clewbayanqling.com	098 41562, 086 8062282, 098 41562	www.clewbayanqling.com

Cloondavaun Bay Marina	Clonmoylan, Ballyshrule, Portumna,			Co. Galway	netsullivan@eircom.net	(090)9749227	
Connemara Safaris	c/o Abbeyglen Hotel	Sky Road	Clifden	Co. Galway		(095) 21071	www.walkingcaneemara.com
Corrib Boats Ltd.	Oughterard,			Co. Galway			
Corrib Canoe Courses	NUIG Kayak Club	NUIG	University Road	Co. Galway	corribcanoe@gmail.com	087 7435644	
Corrib Cruises	Cong,			Co. Mayo	info@corribcruises.com	46029/46292	www.corribcruises.com
Corrib Princess	Furbo Hill,	Furbo,		Co. Galway	corribtours@eircom.net cwh@gofree.indigo.ie	091 592447	www.corribprincess.ie
Corrib Wave Guesthouse & Angling Facilities,	Portacarron,	Oughterard, Co Galway		Co. Galway		091 552147	www.corribwave.com
Cuan na Farraige	Aughoose	Pulathomas,		Co. Mayo			
Cursai Amuigh Faoin Speir	Achill Sound	Achill Island		Co. Mayo	siul@eircom.net	098 45085	members.achilltourism.com/tomasmaclachlaine/
Delphi Adventure Centre	Delphi	Leenane		Co. Galway	info@delphiadventure.com	095 42208	www.delphimountainresort.com
Emerald Star,	Portumna,			Co. Galway	info@emeraldstar.ie	(071)9620234	www.emeraldstar.ie
Galway Bay Sailing Club	Renville, Oranmore,			Co. Galway		+353 91 794527	www.gbssc.ie
Glenans Irish Sailing Club	Collanmore	Rosmoney	Westport	Co. Mayo		098 26046	www.gisc.ie
Hodson Bay Watersports	Hodson Bay	Athlone		Co. Roscommon	stuart@hodsonbay.com	0906493086, 0872111222	www.hodsonbay.com
Inishbofin Island Ferry Service	Middle Quarter, Inishbofin			Co. Galway			www.inishbofinislanddiscovery.com
					curranb@indigo.ie		
Ireland West Angling, Ireland West Sea Kayaking / Saoirse na Mara	Aille, Inverin,			Co. Galway		091 505999	www.irelandwestangling.com
		Westport		Co. Mayo	saoirsenamara@gmail.com	086 1733610	
Kayakmor				Co. Galway	info@kayakmor.com	093 36097	www.kayakmor.com
Killary Adventure Centre	Leenane			Co. Galway	young@killary.com	(095)43411	www.killaryadventure.ie
Killary Cruises	Nancy's Point	Leenane		Co. Galway	alex@killarycruises.com	091 566736	www.killarycruises.com
Leader Charters	Clare Island	Co. Mayo		Co. Mayo			

Leisureland, The Promenade, Salthill, Galway				Co. Galway	leisureland@galwaycity.ie	(091) 521 455	www.leisureland.ie
Lough Key Experience	Lough Key Forest Park	Rockingham	Boyle	Co. Roscommon			www.loughkey.ie
Achill Adventures, Mc Dowells Hotel and Activity Centre,	Dugort,	Achill		Co. Mayo	mcdowellshotel@eircom.net	098-43148	www.achilladventures.com
O'Malley Ferries	Clare Island			Co. Mayo	enquiry@omalleyferries.com		www.omalleyferries.com
Petersburg Outdoor Education Centre	Clonbur,			Co. Galway	trishwalsh@eircom.net	094 9546483	
Pontoon Bridge Hotel,	Angling School,	Pontoon		Co. Mayo	fishing@pontoonbridge.com	094 9256120	www.pontoonbridge.com
Portarra Lodge Angling Holidays	Tullykyne,	Moycullen		Co. Galway	portarralodge@eircom.net		www.portarralodge.com
Rusheen Bay Windsurfing	Barna Road	Salthill	Galway	Co. Galway		091 581974	
Scuba Dive West	Renwyle			Co. Galway	scubadivewest@eircom.net	(095)43922	www.scubadivewest.com
Serious Sailing	Bunown Pier	Ballyconelly	Clifden	Co. Galway	john@serioussailing.com	095 23965/ 086 2400307	www.serioussailing.com
Suck Valley Angling Holidays	Athleague,			Co. Roscommon	info@suckvalley.com		www.suckvalley.com
Surf Mayo	Fallduff	Louisburgh		Co. Mayo	info@surfmayo.com	087 6212508	www.surfmayo.com
Roundstone Sea Angling		Roundstone		Co. Galway		095 35952	www.seaanglingwest.net
The Helm, Sea Angling & Boat Charter	Westport Harbour,	Westport		Co. Mayo	info@thehelm.com		http://www.thehelm.info/
UISCE Outdoor Adventure Centre	Elly Bay	Clogher PO	Belmullet	Co. Mayo		097 82111	
Up-River Canoeing Centre	Bridge St.	Ballinsloe,		Co. Galway	Upriver@ireland.com	090 9644196	www.geocities.com/upriveronline
West of Ireland Angling	Knockfarnaght,	Lahardane, Ballina,		Co. Mayo	daviddinsmore@eircom.net	096 51933	www.westofirelandangling.com
Western Exposure Safari	Letterrack	Co.Galway		Co. Galway		00 353 41132	
Western Kingfisher,					fisherking@eircom.net	095 44649/086 8328278	www.clegganseangling.com
Westport Leisure Park,	Dock Road, James Street,	Cleggan, Westport,		Co. Galway			
WindWise	Crumpaun	Keel	Achill	Co. Mayo	langan@westportleisure.com	098 29160	www.westportleisure.com
					info@windwise.ie	098 43958	

Appendix 6

Marine Tourism Associate Business

Database

Business Name	Address 1	Address 2	Address 3	Phone	Email	Website
Galway Marine Services	Dan Mill		Co. Galway	(066)3379304		Golden Pages -online listing only
Davison's Boats	Loughrea		Co. Galway	(091)841660	sales@davisonsboats.com	www.davisonsboats.com
Duffy K & Sons Ltd	Headford		Co. Galway	(093)35449 (087)2988278 (093)35565	paul@kduffy.com	no co. website but online listing at www.best-maritime.info
Kircullen Marine	Tooreeny	Moycullen	Co. Galway	(091)556046		no co. website but online listing at www.iwai.ie/irishchandlers.html
Cleggan Marine Supplies	Cleggan		Co. Galway	(095)44037	gilgerw@eircom.net	www.clegganmarine.com/shop/
Galway Maritime	Laurance House	Merchants Rd	Co. Galway	(091)566568	olaf@galwaymaritime.com	www.galwaymaritime.com/
Gowen & Bradshaw Ltd	U9 Doughiska Road	Merlin Park	Co. Galway	(091)755818	sales@gowbrad.ie	no co. website but online listing at www.whatswhat.ie/business.php/Gowen-Bradshaw-Ltd/15297/
Purcell Marine	Clarenbridge		Co. Galway	(091) 790273	info@oranmoremaritime.com	www.oranmoremaritime.com
Duffy's Fishing & Shooting	5 Mainguard Street		Co. Galway	(091)562367	brianduffy@shoot.ie	www.shoot.ie
Corrib Tackle	2 Kilkerrin Park	Liosban Ind. Est., Tuam Road,	Co. Galway	(091)769974	forriex@eircom.net	www.corribtackle.com
Tuck Thomas	Oughterard		Co. Galway	(091)552335	tucksfishing@eircom.net	Golden Pages - online listing only
Kyne Anne	Clonbur		Co. Galway	(094)9546197		Golden Pages - online listing only
Freeneys Sports	19-23 High Street		Co. Galway	(091)568794	tonyfreeneey@hotmail.com	no co. website but some online listings www.whatswhat.ie/business.php/Freeneys-Sports/4003/
Rynn Pat	Engineering Ltd	New Docks	Co. Galway	(091) 562568	info@rynneng.ie	no co. website but online listing at www.build.ie/company_477028.htm
Ivor's Ltd	Rahoon Road	Shantalla	Co. Galway	(091) 587400	veronica@ivors.ie	www.ivors.ie
Marine Aquaria	Cloughanover	Headford	Co. Galway	(087)2257853 / (093)36487		Golden Pages - online listing only
O'Connor Fred	Cong Ltd	Cong	Co. Mayo	(094)9546008 / (094)9546771	maria-hughes@hotmail.com	Golden Pages - online listing only
Connamarine Ltd	Unit 10B	Westport Ind. Pk., Westport,	Co. Mayo	(086)9294420	info@connamarine.com	Golden Pages - online listing only
Westport Marine Supplies	Shop St	Westport	Co. Mayo	(098)28800		Golden Pages - online listing only
Abbey Marine	Carrick Rd	Boyle	Co. Roscommon	(071)9663532 / (071)9663732		Golden Pages - online listing only
Tube Station Surf Shop	Louisburgh		Co. Mayo	087 6212508		no online listings
Faoin Tuath	Market Lane	Tone Street, Ballina	Co. Mayo	096 77594	ballina@faintuath.com	no co. website but online listing at www.c-skins.com/stores/surf-eire.htm
Faoin Tuath	Market Street	Cliften	Co. Galway	095 22838	ballina@faintuath.com	as above - same co.
Portwest, Charles Hughe	Altamont Street	Westport	Co Mayo	098 25177 Fax 098 27135	info@portwest.ie	www.portwest.ie
Exposure	3 Cavendish Lane	Castlebar	Co. Mayo	094 34863	castlebarexposure@	www.exposuresports.ie

Appendix 7 Angling laws and Angler obligations in the West of Ireland

Available at <http://www.fishinginireland.info/regulations.htm> (Accessed February 26th, 2010)

A State Licence is required to fish for salmon and sea trout, but does not entitle you to fish. Permits or permission from fisheries owners must be obtained.

General salmon angling regulations

- A State Licence is required to fish for salmon and sea trout
- All salmon (and sea trout over 40cm) kept must be tagged, and the logbook filled out accordingly.
- It is prohibited to keep or kill any sea trout in Connemara or the Ballinakill district.
- It is prohibited sell rod caught salmon or sea trout over 40cm between January 1st and October 31st

Bag Limits

The existing annual bag limit of 10 fish being either salmon or sea trout (over 40 cm) per angler for the 2008 season continues in rivers above their Conservation Limits. This Bye-Law provides for

- a season bag limit of 3 fish in the period 1 Jan to 11 May,
- a daily bag limit of 3 fish from 12 May to 31 August
- and a daily bag limit of 1 fish from 1 September to the end of the season.
- The Bye-law also provides for the use of single hooks and prohibits the use of worms as bait once the specified number of fish have been caught in the specified periods

Open Rivers, Closed Rivers, Catch and Release Rivers, Tagging Scheme, more information Please follow this link for Salmon Angling Regulations 2010 - <http://www.fishinginireland.info/salmon/salmontagging.htm> .

Angling Bye- Laws include;

Bye-Law #724, 1996.

It is hereby prohibited to take or to kill by any means whatsoever in the waters of Lough Corrib, Lough Mask, Lough Carra or their tributaries any salmon or trout of less than twelve (12) inches in length measured (in either case) in a straight line from the tip of the snout to the fork of the tail, or to have in possession on or near any of the said waters any such fish, and any such fish which may be so taken shall be carefully handled and returned alive to the said waters.

Bye-Law #714, 1996.

It is hereby prohibited to use a lure other than an artificial fly in angling for fish with rod and line in the Ballynahinch System, or to have possession, on or near the banks of the Ballynahinch System, of a mounted rod to which is attached a lure other than an artificial fly.

Bye-Law #771, 2000.

It is hereby prohibited: (a) to use any lure other than artificial fly in angling for any kind of fish with rod and line in (1) the Dawros or Kylemore River, Co. Galway from Derryinver Bridge to the sea and (2) the Belclare or Owenwee River, Co. Mayo from Belclare Bridge to the sea. (b) to have in possession on or near the banks of the waters specified in Article 3 (a) of this bye-law any mounted rod to which is attached any lure other than artificial fly.

Bye-Law #720, 1996.

It is hereby prohibited: (a) to use a lure other than an artificial fly in angling for fish with rod and line in the section of the Grange River from the Bridge at Cortoonroe in the county of Galway to the point at which the Imure stream enters the grange River, or (b) to have in possession, on or near the banks of the aforesaid section of the Grange River, of a mounted rod to which is attached a lure other than an artificial fly.

Bye-Law #1997-2002

No. 771, 2000 - Western Fisheries Region-Dawros or Kylemore River and Belclare or Owenwee River Bye-law This Bye-law prohibits angling with any lure other than artificial fly in (1) The Dawros or Kylemore River, Co Galway from Derryinver Bridge to the sea and (2) Belclare or Owenwee River, Co Mayo from Belclare Bridge to the sea from the 12 May, 2000.

Appendix 8

Foreshore Act, 1933

Appendix 8 includes the entire 'Foreshore Act, 1933'. This Act highlights the breadth and depth of restrictions and state procedures and clearly demonstrates the need for review and reform. As discussed in this thesis, this act is a major barrier to the development of marine tourism enterprise development in Ireland.

No. 12/1933:

FORESHORE ACT, 1933

AN ACT TO MAKE PROVISION FOR THE GRANTING OF LEASES AND LICENCES IN RESPECT OF FORESHORE BELONGING TO SAORSTÁT EIREANN AND TO AMEND GENERALLY THE LAW RELATING TO FORESHORE AND THE SEASHORE.

[30th June, 1933.]

BE IT ENACTED BY THE OIREACHTAS OF SAORSTÁT EIREANN AS FOLLOWS:—

- Definitions. 1. —In this Act—
- the expression "the Minister" means the Minister for Industry and Commerce;
- the word "foreshore" means the bed and shore, below the line of high water of ordinary or medium tides, of the sea and of every tidal river and tidal estuary and of every channel, creek and bay of the sea or of any such river or estuary;
- the expression "tidal lands" means the bed and shore, below the line of high water of ordinary spring tides, of the sea and of every tidal river and tidal estuary and of every channel, creek, and bay of the sea or of any such river or estuary;
- the word "seashore" means the foreshore and every beach, bank, and cliff contiguous thereto and includes all sands and rocks contiguous to the foreshore;
- the expression "beach material" means sand, clay, gravel, shingle, stones, rocks, and mineral substances on the surface of the seashore and includes outcrops of rock or any mineral substance above the surface of the seashore and also includes bent grass growing on the seashore and also seaweed whether growing or rooted on the seashore or deposited or washed up thereon by the action of tides, winds, and waves or any of them;
- the expression "sea defence work" means any wall, pier, groyne, stakes, bank, or other work constructed for the purpose of protecting any land, building, or other structure from injury by the sea or the waves or tides thereof;
- the word "lease" includes a letting for one year or for any period less than one year;
- the word "term" includes a period of one year and any period less than one year;
- references to foreshore belonging to Saorstát Eireann shall be construed as references to foreshore which for the time being belongs to Saorstát Eireann whether by virtue of Article 11 of the Constitution or by any other means (present or future) whatsoever.
- Power for Minister to make leases of foreshore. 2. —(1) If, in the opinion of the Minister, it is in the public interest that a lease shall be made to any person of any foreshore belonging to Saorstát Eireann, the Minister may, subject to the provisions of this Act, demise by deed under his official seal such foreshore with the buildings and other structures (if any) thereon to such person by way of lease for such term, not exceeding ninety-nine years, commencing at or before the date of such lease, as the Minister shall think proper.

- (2) Every lease made under this section shall (unless the Minister is of opinion that such lease should in the public interest be made free of any payment) be made subject to the payment to the Minister of such moneys, whether by way of fine or other preliminary payment or by way of rent or other periodical payment or by way of royalty on material removed or by all or any of such ways, as the Minister shall think proper and shall agree upon with the person to whom such lease is made.
- (3) Notwithstanding anything contained in this section, no lease reserving a rent or other annual payment exceeding ten pounds a year shall be made under this section without the sanction of the Minister for Finance.
- (4) Every lease made under this section shall contain a power or proviso for re-entry on the breach, non-performance, or non-observance by the lessee of any covenant on the lessee's part (including a covenant for payment of rent, royalty, or other money), condition, or agreement contained therein.
- (5) No lease made under this section shall contain any covenant or agreement for the renewal of such lease.
- (6) Every lease under this section shall (subject to the provisions of this section) contain such covenants, conditions, and agreements as the Minister shall consider proper or desirable in the public interest and shall agree upon with the person to whom such lease is made.
- (7) A lease made under this section may include all minerals on or in the demised foreshore to a depth of thirty feet from the surface of such foreshore, together with the right to get and take such minerals, but no such lease shall extend to or include any mines or minerals more than thirty feet below the surface of the demised foreshore.
- (8) Whenever an application is made to the Minister for a lease under this section, the Minister may, if he thinks fit, hold a public inquiry in regard to the making of such lease.
- Power for Minister to grant licences of foreshore. 3. —(1) If, in the opinion of the Minister, it is in the public interest that a licence should be granted to any person in respect of any foreshore belonging to Saorstát Eireann authorising such person to place any material or to place or erect any articles, things, structures, or works in or on such foreshore, to remove any beach material from such foreshore, to get and take any minerals in such foreshore and not more than thirty feet below the surface thereof, or to use or occupy such foreshore for any purpose, the Minister may, subject to the provisions of this Act, grant by deed under his official seal such licence to such person for such term not exceeding ninety-nine years commencing at or before the date of such licence, as the Minister shall think proper.
- (2) Every licence granted under this section shall (unless the Minister is of opinion that such licence should in the public interest be granted free of any payment) be granted subject to the payment to the Minister of such moneys, whether by way of fine or other preliminary payment or by way of rent or other periodical payment or by way of royalty on material removed or by all or any of such ways, as the Minister shall think proper and shall agree upon with the person to whom such licence is granted.
- (3) Where, in the opinion of the Minister, a licence proposed to be granted under this section is, owing to its nature, duration, or otherwise, of a trivial character and should be granted without payment or subject to a nominal payment only, such licence may, notwithstanding anything contained in this section, be granted by way of permission in writing signed by the Minister or one of the principal officers of his Department.
- (4) Notwithstanding anything contained in this section, no licence requiring payment by the licensee of a rent or other annual payment exceeding ten pounds a year shall be granted under this section without the sanction of the Minister for Finance.
- (5) Every licence granted under this section shall contain a power to the Minister to terminate such licence on breach, non performance, or non-observance by the licensee of any covenant on

the licensee's part (including a covenant for payment of rent, royalty or other money), condition or agreement contained therein.

- (6) No licence granted under this section shall contain any covenant or agreement for the renewal of such licence.

- (7) Every licence granted under this section shall (subject to the provisions of this section) contain such covenants, conditions, and agreements as the Minister shall consider proper or desirable in the public interest and shall agree upon with the person to whom such licence is granted.

- (8) No licence granted under this section shall extend to or authorise the removal of any minerals lying more than thirty feet below the surface of the foreshore to which such licence relates.

- (9) Whenever an application is made to the Minister for the grant of a licence under this section, the Minister may, if he thinks fit, hold a public inquiry in regard to the granting of such licence.

- Surrenders, releases and waivers in respect of leases and licences. 4. —(1) The Minister may, if and whenever he thinks proper so to do, accept a surrender of any lease or licence of foreshore belonging to Saorstát Eireann whether such lease or licence was made or granted under this Act or before the passing of this Act.

- (2) The Minister may, if and whenever he thinks proper so to do, waive or release by deed under his official seal any covenant or condition contained in any lease or licence (whether made or granted under this Act or before the passing of this Act) of foreshore belonging to Saorstát Eireann, whether a breach of such covenant or condition has or has not taken place, and may also, if and whenever he thinks proper so to do, waive any breach (whether occasioning or not occasioning a forfeiture) of any covenant or condition contained in any such lease or licence.

- (3) The Minister may accept a surrender, waive or release a covenant or condition, or waive a breach of covenant or condition under this section either, as he thinks proper, without consideration or for such consideration as he thinks proper.

- Power for Minister to acquire foreshore, etc. 5. —The Minister may at any time at his discretion, but subject to the consent of the Minister for Finance, either—

- (a) purchase by agreement at such price and on such terms as he shall, with the consent aforesaid, think proper any foreshore, any easement, profit-a-prendre, or other right over any foreshore, or any right of wreck not belonging to Saorstát Eireann; or

- (b) take by agreement a lease for such term, at such rent, and subject to such covenants and conditions as he shall, with the consent aforesaid, think proper of any foreshore, any easement, profit-a-prendre or other right over any foreshore, or any right of wreck not belonging to Saorstát Eireann.

- Order prohibiting removal of beach material from seashore. 6. —(1) In this Act the expression "prohibitory order" means an order made, or deemed to have been made under this section prohibiting the removal of beach material from an area of seashore.

- (2) Whenever the Minister is of opinion that the removal or the unrestricted removal of beach material of any kind or of any particular kind or kinds from any particular area of seashore has affected or is likely to affect prejudicially any public rights in respect of such area of seashore or any lands or water in the neighbourhood thereof or has caused or is likely to cause injury to any land or to any building, wall, pier, or other structure, the Minister may prohibit by order the removal by any person of beach material either (as the case may require) of any kind or of the said particular kind or kinds from the said area of seashore.

- (3) The Minister may by order at any time at his discretion, revoke or amend a prohibitory order.

- (4) Whenever the Minister has made or proposes to make, amend, or revoke a prohibitory order, the Minister may, if he thinks fit, hold a public inquiry in regard to the continuation, making, amendment, or revocation (as the case may be) of such order.
 - (5) Every person who shall remove any beach material from any foreshore or seashore in contravention of a prohibitory order shall be guilty of an offence under this section and shall be liable on summary conviction thereof in the case of a first offence, to a fine not exceeding ten pounds, and, in the case of a second or any subsequent offence, to a fine of ten pounds and, in every case to forfeiture of the beach material so removed.
 - (6) Every order made under section 14 of the Harbours Act, 1814, and in force at the passing of this Act shall continue in force notwithstanding the repeal of that section by this Act, and every such order shall for all purposes be deemed to have been made under this section on the date on which it was actually made although such date is prior to the passing of this Act.
 - (7) A prohibitory order shall not operate to prevent the granting under this Act of a licence to remove beach material from foreshore to which such order applies or to prevent the removal of beach material from such foreshore under and in accordance with a licence granted (whether before or after the making of such order) under this Act.
- Notice prohibiting removal of beach material from foreshore. 7. —(1) Whenever the Minister is of opinion that the removal of beach material from any area of foreshore belonging to Saorstát Éireann in respect of which no prohibitory order is in force should be restricted or controlled, the Minister may serve on any person a notice (in this section referred to as a prohibitory notice) in writing prohibiting such person from removing beach material of any kind or of any specified kind or kinds from the said area of foreshore.
- (2) It shall not be lawful for any person on whom a prohibitory notice has been served to remove (otherwise granted under and in accordance with a licence granted under this Act) any beach material to which such notice applies from the area of foreshore to which such notice relates.
 - (3) Every person who removes any beach material from any foreshore in contravention of this section shall be guilty of an offence under this section and shall be liable on summary conviction thereof, in the case of a first offence, to a fine not exceeding five pounds and, in the case of a second or any subsequent offence, to a fine not exceeding ten pounds.
- Regulations in respect of the public use of foreshore. 8. —(1) If and whenever the Minister is of opinion that the entry of the public on or the use by the public of any particular area of foreshore belonging to Saorstát Éireann ought in the public interest to be prohibited, restricted, regulated, or controlled, either permanently or temporarily, the Minister may by order make regulations prohibiting, restricting, regulating, or controlling in such manner, to such extent, and for such period, limited or unlimited, as the Minister shall think proper the entry of the public on or the use by the public of such area of foreshore either for any purpose or any specified purpose or purposes other than the purposes hereinafter excepted.
- (2) Every person who shall do any act (whether of commission or omission) which is a breach of a regulation made under this section shall be guilty of an offence under this section and shall be liable on summary conviction thereof to a fine not exceeding five pounds.
 - (3) Whenever the Minister has made or proposes to make a regulation under this section, the Minister may if he thinks fit hold a public inquiry in regard to the continuation or the making (as the case may be) of such regulation.
 - (4) Regulations made under this section shall not extend to or affect the use of any foreshore for the purpose of navigation or of fishing, nor the removal of beach material from any foreshore.
- Authorisation by Minister of sea defence works. 9. —(1) Any person desiring to erect on any seashore which is not owned by him and does not belong to Saorstát Éireann any sea defence work may apply to the Minister for authority to erect such work, and thereupon the Minister, if he is satisfied that the erection of a sea defence work is necessary for the protection of the property of such person and that it is right and proper that such person should be empowered to

erect such work, may by order authorise such person to erect on such seashore the sea defence work mentioned in his said application with such (if any) modifications as the Minister shall think proper to specify.

- (2) The Minister may insert in any order made by him under this section such conditions and restrictions (including conditions in relation to the assessment and payment of compensation) as he shall think proper.

- (3) Whenever an application is made to the Minister for an order under this section, the Minister may, if he thinks fit, hold a public inquiry in relation to the making of such order.

- (4) An order under this section shall be expressed and shall operate to authorise the person named therein to enter on the seashore specified therein and to erect on such seashore a specified sea defence work, but subject to payment of compensation for all damage done and subject to such conditions and restrictions as shall be specified in such order.

- **Erection of structures on foreshore. 10. —(1)** No person shall erect on any tidal lands not belonging to Saorstát Eireann any building, pier, wall, or other permanent structure otherwise than in accordance with maps, plans, and specifications approved of by the Minister.

- (2) The Minister shall not refuse to approve under this section of any maps, plans, and specifications on any ground save that a structure erected in accordance with such maps, plans, and specifications would be or would cause or be likely to cause (directly or indirectly) an obstruction to navigation or to fishing.

- (3) Whenever any structure is erected in contravention of this section and the Minister is of opinion that such structure is or causes or is likely to cause (directly or indirectly) an obstruction to navigation or to fishing, the Minister may serve on the person by whom such structure was erected or, if such person is dead or (if a corporate body) is dissolved or if such person is not known or cannot be found, on any person in possession of such structure a notice in writing requiring such person to pull down and remove such structure within such time (not being less than one month) from the service of such notice as the Minister shall think proper and shall specify in such notice.

- (4) Whenever a person on whom a notice has been served under the next preceding subsection of this section fails to pull down and remove the structure to which such notice relates within the time specified in that behalf in such notice, the Minister may (as the case may require) pull down and remove or complete the pulling down and removal of such structure or cause (as the case may require) such structure to be pulled down and removed or the pulling down and removal thereof to be completed and (in any case) shall be entitled to be paid by and to recover from the said person on whom the said notice was so served the costs and expenses of such pulling down and removal or completion (as the case may be) as a civil debt in any Court of competent jurisdiction.

- **Removal of dilapidated structures from foreshore. 11. —(1)** Where any building, pier, wall, or other structure erected (whether before or after the passing of this Act) with or without lawful authority on any foreshore, whether belonging or not belonging to Saorstát Eireann, is out of repair or dilapidated and in the opinion of the Minister is or causes or is likely to cause (directly or indirectly) an obstruction to navigation or to fishing the Minister may pull down and remove such structure or cause such structure to be pulled down and removed, and may for that purpose authorise any person to enter on such structure and the foreshore and the seashore adjacent thereto.

- (2) The Minister shall not under this section pull down or remove or cause to be pulled down and removed any structure of which the owner is known and can be found without serving on such owner a notice in writing requiring him either to repair or to pull down and remove such structure and giving him a reasonable opportunity so to do.

- (3) Whenever the Minister pulls down and removes or causes to be pulled down and removed any structure under this section, the Minister shall be entitled to be paid by and to recover from the owner of such structure the costs and expenses of such pulling down and removal as a civil debt in any Court of competent jurisdiction.

- Structures unlawfully erected on State foreshore. 12. —(1) Where any building, pier, wall or other structure has been erected (whether before or after the passing of this Act) without lawful authority on foreshore belonging to Saorstát Eireann, the Justice of the District Court having jurisdiction in the district in which such foreshore is situate may, on the application of the Minister, either (as the case may require)—

- (a) make an order requiring the person by whom such structure was erected or, where such person is dead or if a corporate body) is dissolved or such person is not known or cannot be found, any person in possession of such structure, to pull down and remove such structure within a specified time, or

- (b) where such Justice is satisfied that the person by whom such structure was erected is dead or (if a corporate body) is dissolved or is not known or cannot be found and that no person is in possession of such structure, make an order authorising the Minister to pull down and remove such structure.

- (2) The following provisions shall have effect in relation to the making and operation of an order under this section requiring a person (in this sub-section referred to as the defendant) to pull down and remove a structure, that is to say:—

- (a) such order shall not be made without notice to the defendant of the application for such order;

- (b) such order shall not be made unless either the Minister has offered to make under this Act to the defendant a lease of the foreshore on which such structure is erected and such offer has not been accepted or the Minister has issued a certificate sealed with his official seal certifying that such structure is or causes directly or indirectly an obstruction to navigation;

- (c) where such order has been made and the defendant does not pull down and remove such structure within the time specified in such order, the Minister may pull down and remove such structure or cause such structure to be pulled down and removed and shall be entitled to be paid by and to recover from the defendant as a civil debt the costs and expenses of such pulling down and removal.

- Prohibition of deposit of material on foreshore. 13. —(1) No person shall, without the consent of the Minister or otherwise than in accordance with such consent, deposit or cause to be deposited any material whatsoever on any foreshore nor on any seashore or other place from which such material would by the operation of gravity, wind, water or other natural cause escape or be transported to such foreshore.

- (2) Every person who deposits or causes to be deposited any material whatsoever on any foreshore, seashore, or other place in contravention of this section shall be guilty of an offence under this sub-section and shall be liable on summary conviction thereof to a fine not exceeding ten pounds.

- (3) Whenever a person is convicted of an offence under the next preceding sub-section of this section, the Court by whom such person is so convicted may, if such Court so thinks proper, make an order requiring such person, within a specified time, to remove the material in respect of the deposit of which he was so convicted from the foreshore, seashore, or other place in which it was so deposited, and to remove from such foreshore, seashore, or other place all other (if any) material deposited thereon by him in contravention of this section.

- (4) If any person in respect of whom an order has been made under the next preceding sub-section of this section fails to comply with such order, such person shall be guilty of an offence under this sub-section and shall be liable on summary conviction thereof to a fine not exceeding ten pounds together with a further fine not exceeding one pound for every day during which such failure is continued.

- Prohibition of deposit of noxious articles. 14. —(1) No person shall throw, deposit, or leave on any tidal lands or throw into the sea adjacent to any such lands any glass, china, earthenware, metal, or other article (whether whole or broken) which would or might cause injury to a person

bathing or wading on or from such lands or otherwise using such lands nor any material or substance (whether solid or liquid) which would or might be injurious or offensive to any such person.

- (2) Every person who shall throw, deposit, or leave on any tidal lands, or throw into the sea any article, material, or substance in contravention of this section shall be guilty of an offence under this section and shall be liable on summary conviction thereof to a fine not exceeding five pounds.

- Evidence of title to foreshore. 15. —(1) Where on the fixing of a judicial rent under the Land Law Acts a sum was added to or included in such rent for any foreshore or on account of any right or facility or alleged right or facility to or for taking material from any foreshore the order of the sub-commission or court fixing such rent shall not be evidence, as against the State, of the ownership of such foreshore or of the existence of a right to take such material.

- (2) Neither the taking, during any period however long, from any foreshore of seaweed deposited or washed up thereon by the action of tides, winds and waves or any of them and not rooted or growing thereon, nor the letting or licensing to other persons, during any period however long, of an alleged right to take such seaweed from any foreshore shall, by itself and without more, constitute possession of or be proof of title to such foreshore.

- Jurisdiction of the Circuit Court. 16. —(1) The Circuit Court shall have and may exercise jurisdiction in actions relating to foreshore or rights over or in respect of foreshore where there is no poor law valuation of such foreshore and the Court is satisfied that the fair annual value of such foreshore does not exceed sixty pounds.

- (2) The jurisdiction conferred on the Circuit Court by this section shall be exercised by the Judge of the Circuit Court for the time being assigned to the Circuit in which such foreshore or the larger portion of such foreshore is situate.

- Notice to minister of certain sales, etc, of foreshore. 17. —(1) No sale or conveyance of or declaration of title to any foreshore or any right over or in respect of foreshore shall be made under the Landed Estates Court (Ireland) Act, 1858, as amended, extended, and applied by subsequent enactments, without previous notice to the Minister.

- (2) No vesting order, vesting flat, or other document operating to vest or convey any foreshore or any right over or in respect of foreshore in or to any person shall be made under the Land Purchase Acts without previous notice to the Minister.

- (3) No order, consent, approval, licence, or loan shall be made or given nor shall any action be taken relating to or affecting any foreshore by any Minister, the Commissioners of Public Works in Ireland, the Irish Land Commission, or any Court or tribunal without previous notice to the Minister.

- Public enquiries. 18. —The following provisions shall have effect in relation to every public inquiry held by the Minister under this Act, that is to say:—

- (a) such inquiry shall be held by such person and at such time and place as the Minister shall appoint;

- (b) the Minister shall cause notice of the holding of such inquiry to be given in such manner as he thinks proper to the public and to such particular persons as he thinks proper;

- (c) the person holding such inquiry shall have power to take evidence on oath and for that purpose to administer oaths;

- (d) all expenses incurred by the Minister in holding a public inquiry on the question whether a lease, licence, order, or other document for which a particular person has applied should or should not be made or granted shall, unless the Minister with the sanction of the Minister for Finance otherwise directs, be paid by the said person who has so applied, and the amount of such expenses shall be fixed by the Minister for Finance, and when so fixed shall be recoverable by the Minister from the said person as a civil debt in any Court of competent jurisdiction;

- (e) whenever the expenses or any part of the expenses incurred by the Minister in holding a public inquiry are not payable by a particular person under the next preceding paragraph of this section, such expenses or such part of such expenses shall be defrayed out of moneys provided by the Oireachtas;

- (f) the person holding a public inquiry under this section may, if he thinks proper so to do, order the costs and expenses incurred by any person of appearing or being represented and adducing evidence at such inquiry to be paid by any other person who appeared or was represented at such inquiry;

- (g) whenever the person holding a public inquiry under this section orders the costs and expenses incurred by one person to be paid by another person, such costs and expenses shall be taxed and ascertained by a taxing master of the High Court on the requisition of either the person to whom or the person by whom such costs and expenses were so ordered to be paid, and the amount of such costs and expenses when so taxed and ascertained shall be recoverable as a simple contract debt in any Court of competent jurisdiction by the person to whom and from the person by whom such costs and expenses were so ordered to be paid.

- Notice of proposal or application for order, lease or licence. 19. —Whenever the Minister proposes to make an order under this Act or an application is made to the Minister for the making of a lease or an order or the granting of a licence under this Act, the Minister may, if he so thinks fit, cause notice of such proposal or application to be published at such times and in such manner as he thinks proper, and may by such notice give to all persons interested an opportunity of making to the Minister objections, and representations in respect of such order, lease, or licence (as the case may be) and may include in such notice directions as to the time, manner, and place in and at which such objections and representations may be made.

- Laying of annual statement before the Oireachtas. 20. —The Minister shall, in every financial year, lay before each House of the Oireachtas a statement setting forth the following matters, that is to say:—

- (a) particulars of all leases made and licences granted under this Act during the next preceding financial year, and

- (b) the total amount of all rents and other periodical payments collected by the Minister under or by virtue of any lease or licence of foreshore (whether made or granted under this Act or before the passing of this Act) during the said next preceding financial year, and

- (c) any other matter relating to foreshore which the Minister thinks proper to include in such statement.

- Publication of orders under this Act. 21. —(1) Every order made by the Minister under this Act shall be published in the Irish Oifigiúil as soon as conveniently may be after it is made.

- (2) Whenever the Minister has made an order under this Act the Minister may, if and whenever he thinks it expedient so to do, cause the said order or notice of the making thereof to be published at or in the neighbourhood of the foreshore, tidal lands, seashore, or other area to which such order relates and may cause such publication to be effected in all or any of the following ways, that is to say, by advertisement in one or more newspapers circulating in the district in which such area is situated, by the erection of warning notices at or in the neighbourhood of such area, or by any other means.

- Financial provisions. 22. —(1) Save as is otherwise provided by this Act, all expenses incurred by the Minister in the execution of this Act shall, to such extent as shall be sanctioned by the Minister for Finance, be paid out of moneys provided by the Oireachtas.

- (2) All rents, fines, royalties, and other moneys paid to the Minister under or in respect of any lease, licence, or other document made or granted under this Act shall be paid into or disposed of for the benefit of the Exchequer in such manner as the Minister for Finance shall direct.

- Recovery of expenses of making orders. 23. —(1) Whenever the Minister makes an order under this Act on the application or at the request of any person, the Minister may, if he thinks proper so to do, recover from such person as a civil debt the expenses incurred by the Minister in making and publishing such order.

- (2) In any proceedings to recover any expenses made recoverable by this section, a certificate under the official seal of the Minister certifying that a specified order under this Act was made on the application or at the request of a specified person and certifying the amount of the expenses incurred by the Minister in making and publishing such order shall be conclusive evidence of the matters so certified.

- Exclusion of application of certain Acts. 24. —On the passing of this Act, the State Lands Act, 1924 (No. 45 of 1924), shall cease to apply to foreshore or rights over or in respect of foreshore and the Mines and Minerals Act, 1931 (No. 54 of 1931), shall cease to apply to mines and minerals in or under the foreshore and not more than thirty feet below the surface thereof.

- Repeals. 25. —The enactments mentioned in the Schedule to this Act are hereby repealed to the extent specified in the third column of the said Schedule.

- Short title. 26. —This Act may be cited as the Foreshore Act, 1933 .

Appendix 9

Ireland Rail Maps

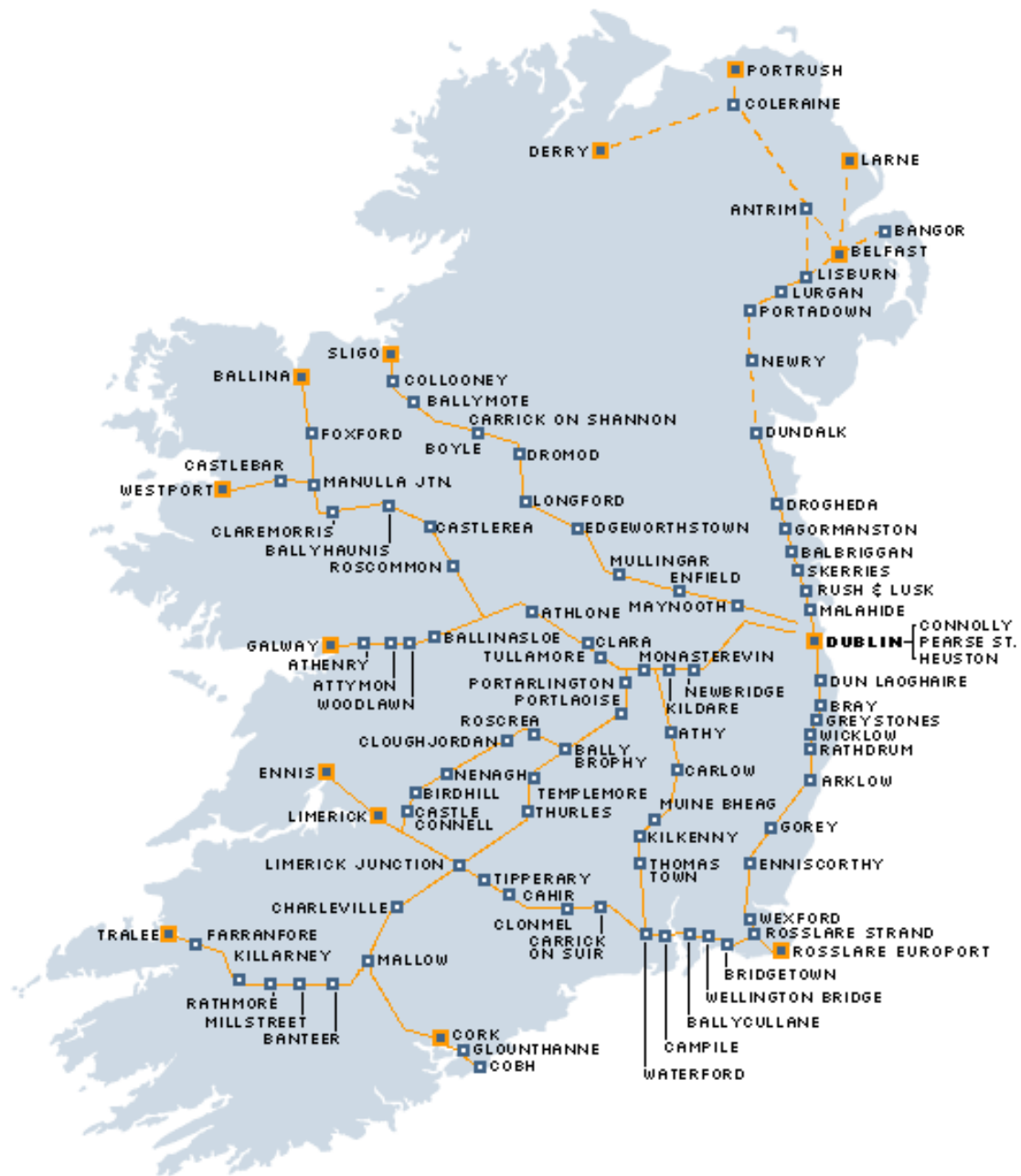
As discussed in Chapter 3, the railways played a major role in developing marine tourism in Ireland. The maps below provide a '1925' picture of the extensive network, which enabled access to coastal towns throughout Ireland. The 2009 map provides a different picture - a dismantled railway network as a result of new transport developments in the 1900's.

Ireland's Extensive Rail Network 1925



Source: Viceregal Commission 1906

Ireland's Rail Network 2009



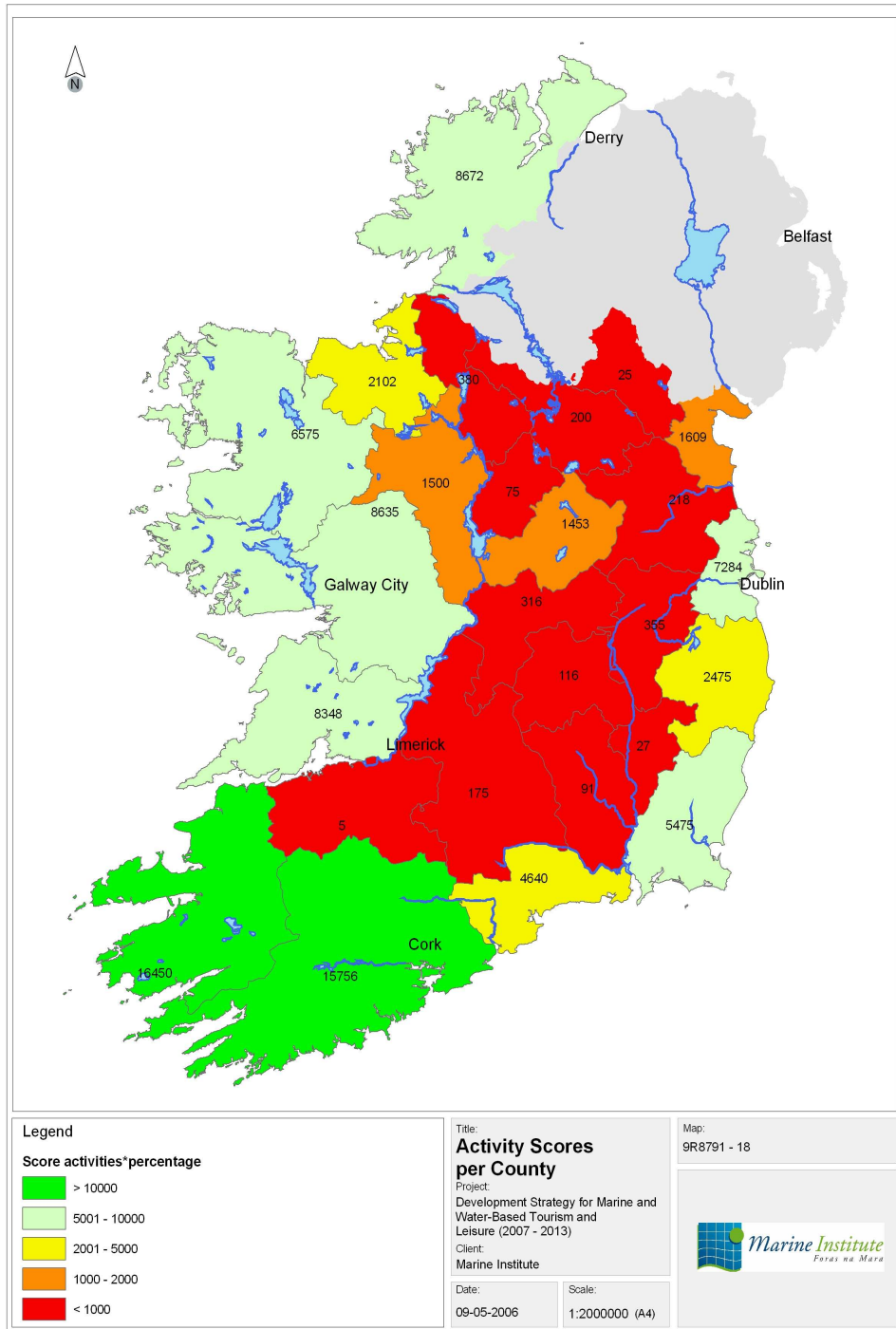
Source: www.irishrail.ie (accessed August 2009)

Appendix 10

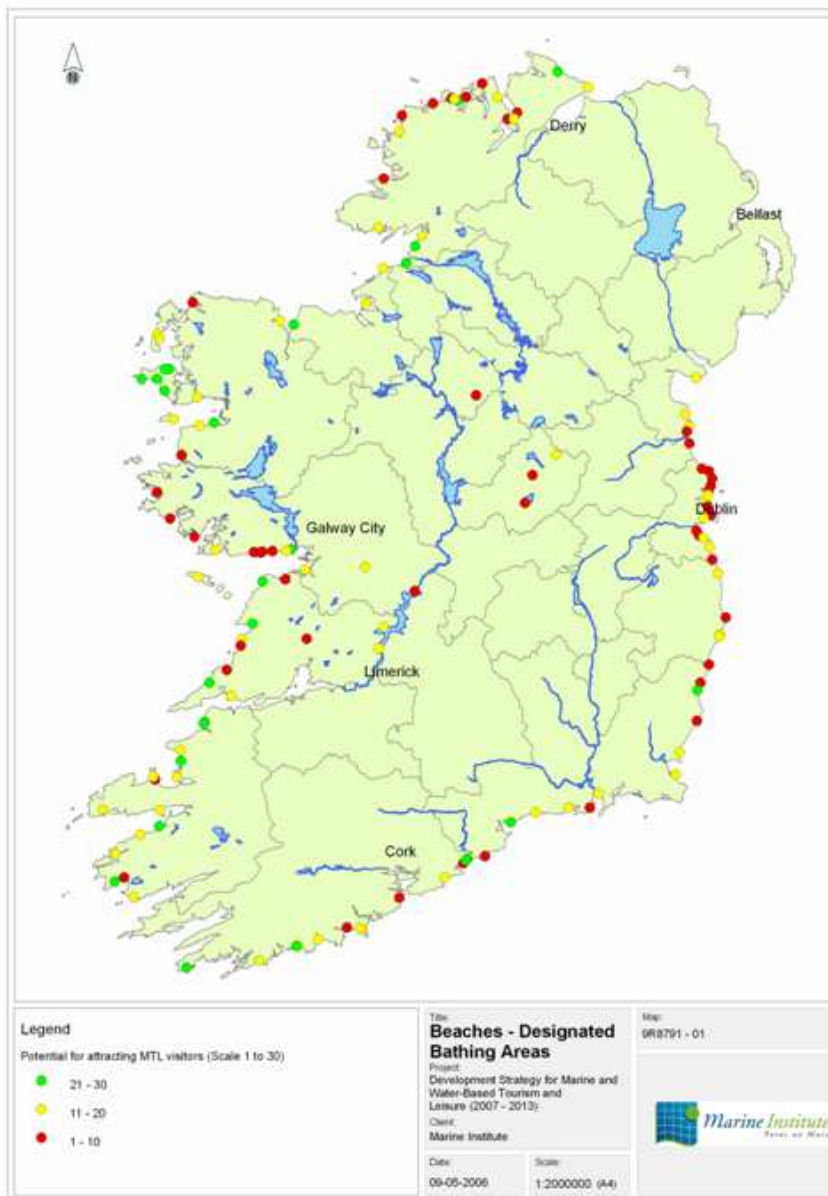
Marine Tourism Product Location Maps Ireland

See page 88-90, Chapter 4 for weighting and activity score descriptions for Map 1 – 12.

Map 1: Marine Tourism Product Locations in Ireland



Map 2: Beaches - Designated Bathing Areas



Map 3: Diving Centres



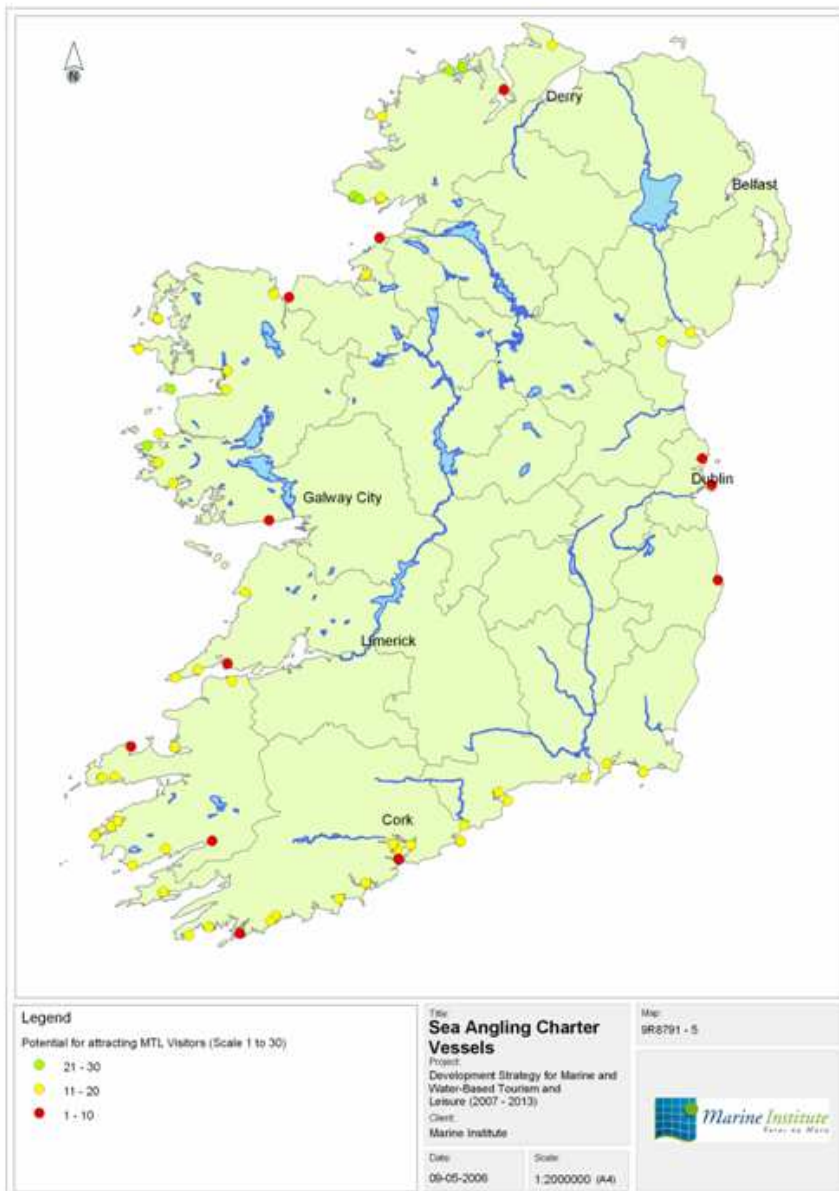
Map 4: Visitor Marinas



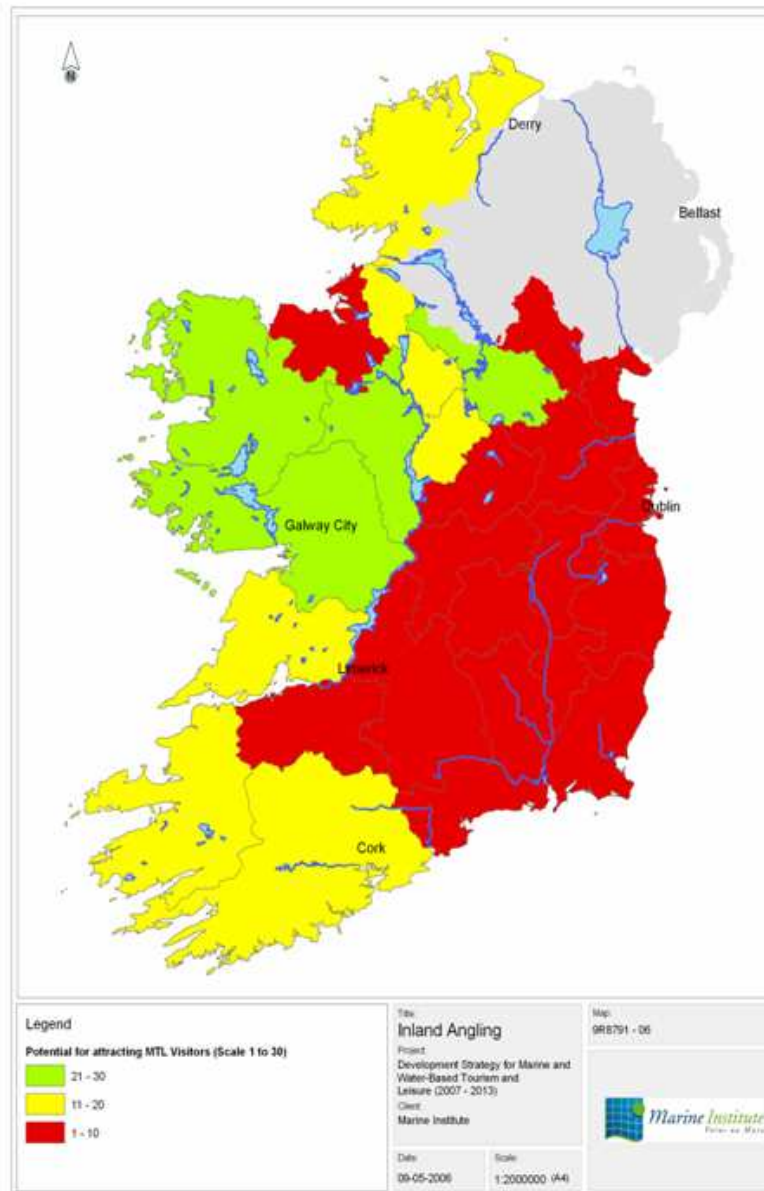
Map 5: Sailing, Boating and Watersport Centres



Map 6: Sea Angling Charter Vessels



Map 7: Inland Angling Locations



Map 8: Coastal & Waterway Walks



Map 9: Whale & Dolphin Watching Locations



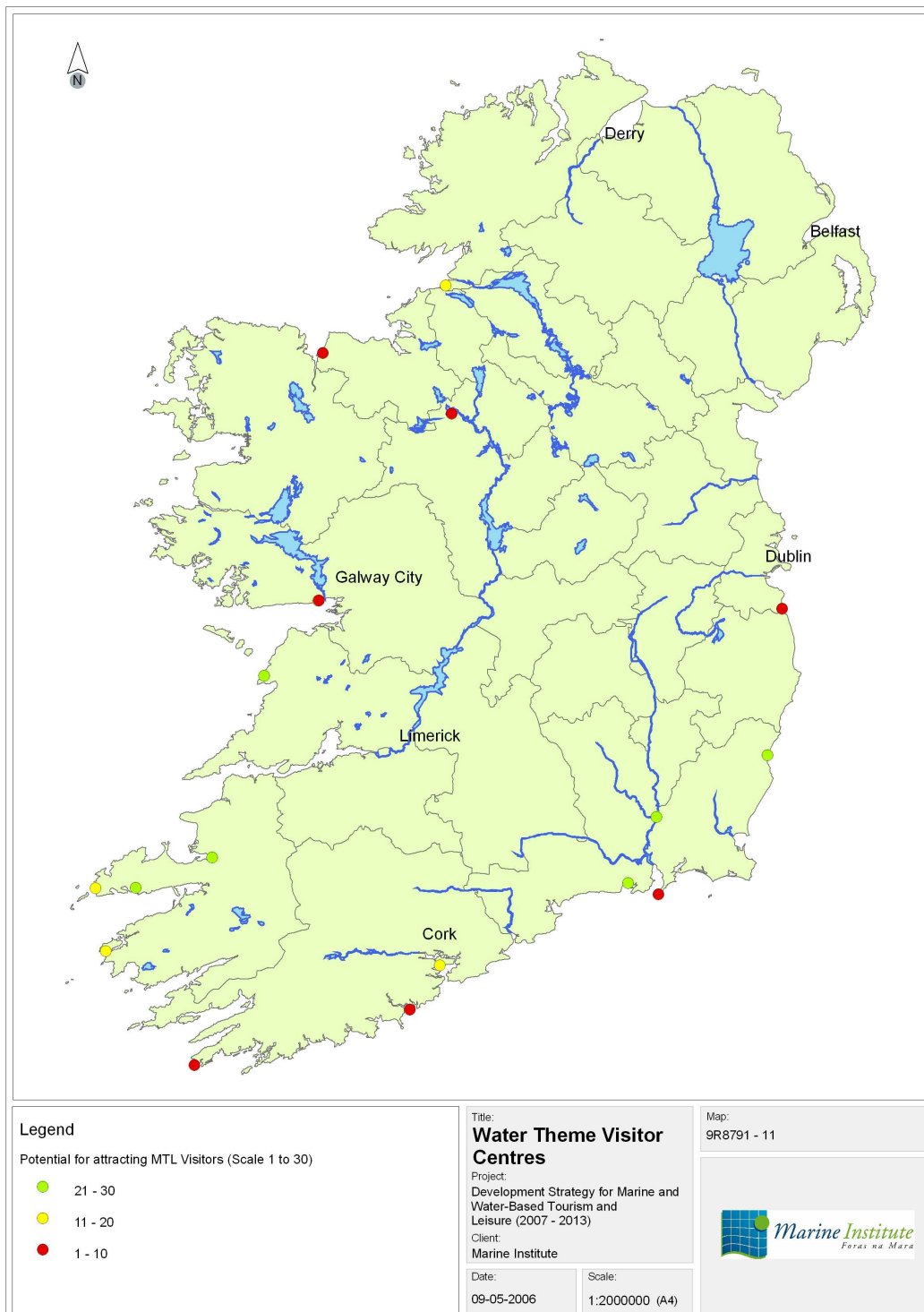
Map 10: Navigable Inland Waterways



Map 11: Small Tourism Vessels Locations



Map 12: Water Theme Visitor Centres



Source Map 1-12: Marine Institute, May 2006.

Appendix 11

Support Agencies Operating in the Water-Based Tourism and Leisure Sector

This section outlines the various bodies connected to the water-based leisure businesses in Ireland. The agents and organisations listed in this section have been consulted and their operations reviewed during this PhD research study.

GOVERNMENT DEPARTMENTS

Seven government departments and their associated agencies have a direct or indirect role to play in the developing the water-based tourism and leisure sector.

Department of Communications Marine & Natural Resources

Department of Arts, Sports and Tourism

Department of Community, Rural and Gaeltacht Affairs

Department of Agriculture and Food

Department of the Environment

Department of Education and Science

Department of Enterprise, Trade & Employment

RESEARCH

Thorough and comprehensive research is central to the sustainable development of Ireland's marine resources. This section provides information on the various groups and organisations which carry out research and development relevant to the Irish marine environment. In addition, a growing number of third level colleges are establishing socio-economic research centres, offering both consultancy services and research programmes. A cross-section of groups are listed below to give an indication of the type of information available.

The public sector groups frequently publish general research reports which may provide new business start-ups with good background material. Many of them also provide business interests with support information to help with the design of successful products and services, while at the same time advocating effective resource management practices.

The research centres include:

Competitive Business Intelligence (CBI)

Centre for Sustainability

Centre for Coastal and Marine Research (CCMR)

Coastal & Marine Resources Centre (CMRC)

Fáilte Ireland- Research & Statistics

Galway Development Services International (GDSI)

Hydraulics & Maritime Research Centre (HMRC)

Insight Statistical Consulting

Marine Institute- Water-Based Tourism & Leisure Section

Nautical Enterprise Centre

National Centre for Tourism Policy Studies

Rural Development Unit

Tourism Research Centre

University of Ulster Freshwater Laboratory

West of Ireland Centre for Tourism & Hospitality Research, GMIT

REPRESENTATIVE ASSOCIATIONS

Commercial bodies provide support for the various businesses within the water-based tourism and leisure sector. They represent the combined interests of the sector with regard to maintaining service standards and fostering opportunities for further business development. Recreational bodies provide an invaluable support service to the relevant local clubs and their membership. They also take responsibility for the general development of the sport.

The Angling Council of Ireland

Comhdháil Oileáin na hÉireann (Irish Islands Federation)

Federation of Irish Salmon and Sea Trout Anglers (FISSTA)

Federation of Rural Tourism

Inland Waterways Association of Ireland (IWAI)

Irish Association of Activity Centres (IAAC)

Irish Amateur Rowing Union (IARU)

Irish Association for Sail Training

Irish Boat Rental Association (IBRA)

Irish Canoe Union Surf Committee

Irish Canoe Union (ICU)

Irish Cruising Club (ICC)

Irish Dive Centre Association (IDCA)

Irish Federation of Sea Anglers (IFSA)

Irish Federation of Pike Angling Clubs (IFPAC)

Irish Marina Operators Association (IMOA)

Irish Marine Federation (IMF)

Irish Passenger Boats & Ferry Operators Association (IPBFOA)

Irish Sailing Association (ISA)

Irish Sea Kayaking Association (ISKA)

Irish Surfing Association

Irish Tourist Information Confederation (ITIC)

Irish Underwater Council- Comhairle Fo Thuinn (CFT)

Irish Water Ski Federation

Irish Windsurfing Association (IWA)

Motor Boat Association of Ireland

National Anglers Representative Association (NARA)

National Coarse Fishing Federation of Ireland (NCFFI)

Professional Angling Guides of Ireland (PAGI)

Sailing Marketing Group

Shark Angling Club of Ireland

Trout Anglers Federation of Ireland

TRAINING

Fáilte Ireland and the Marine Institute, supported by the Fisheries Boards, have developed a successful training programme, 'the *Marine and Countryside Guide Programme*', for those interested in working in the tourism activity sector in Ireland. Courses with a water-based tourism and leisure interest are increasingly being offered by the various colleges, institutes and universities. These courses provide broad-based management skills as well as specialist recreational training. In addition to specialist options such as canoeing, kayaking, swimming, lifeguard/life saving, sailing, windsurfing etc, students can also study customer care, marketing, operational management, law and leisure management, human resources, communications and information technology.

Angling Guide Qualifications

Coach Education- NCTC

Fáilte Ireland- Marine and Countryside Guides Certificate

FÁS

FETAC- Further Education and Training Awards Council

HETAC - Higher Education and Training Awards Council

Irish Sailing Association (ISA)

Ongoing Training Courses- Institute of Leisure & Amenity Management

Outdoor Education Centres (OECs)

University Courses

FUNDING

A range of funding programmes and initiatives are available to the water-based tourism and leisure sector. The sources of funds are varied. They range from government departments, local government agencies and semi-state organisations to European Union funds and other initiatives.

Business Expansion Scheme (BES)

County Enterprise Boards - Local Enterprise Development Sub-Programmes, NDP 2000-2006

Fisheries Inshore Diversification and Safety Programme

Grant Scheme for National Governing Bodies (NGBs)

Interreg IIIA Ireland/Wales

Interreg IIIA North/South

Interreg IIIB Atlantic Area

Interreg IIIB North West Europe (NWE)

International Sports Tourism Initiative 2000-2007

Leader Programme

Local Sports Partnership Initiative - Programme for Prosperity and Fairness

Marine RTDI Measure NDP 2000-2006

Peace II Programme

Shannon Development- Tourism Heritage & Innovation Programme

Sports Capital Programme - National Lottery funded

Sub Measure 2: Western Investment Fund - General Rural Development Measure, NDP 2000-2006

Sub Measure 2: Special Interest Pursuits - Tourism Product Development Scheme, NDP 2000-2006

Sub Measure 3: Tourism/ Environment Management - Tourism Product Development Scheme, NDP 2000-2006

Sub Measure 4: Tourism & Recreational Angling - Tourism Product Development Scheme, NDP 2000-2006

Sub Measure 5: Marine Tourism - Tourism Product Development Scheme, NDP 2000-2006

Údarás na Gaeltachta - NDP 2000-2006

OTHER FUNDING AND DEVELOPMENT AGENCY LINKS

County and City Development Boards

City and County Enterprise Boards

European Business Innovation Centres

European Information Centres

LEADER - Local Action Groups

Regional Authorities

Regional Fisheries Boards

Regional Tourism Authorities

Appendix 12 ESRI Study 2003, Expenditure and Employment Tables

Table: Expenditure on equipment; day-trips and overnight trips in 2003

Activity	Average expenditure per participant on equipment €	Total expenditure per participant on equipment €millions	Average expenditure per participant on day trips €	Total expenditure per participant on day trips €millions	Average expenditure per participant on overnight trips €	Total expenditure on accommodation on overnight trips €millions	Total expenditure on travel on overnight trips €millions	Total expenditure on 'other' on overnight trips €millions	Total expenditure on overnight trips €millions
Freshwater Angling for Coarse Fish	96	6.4	32.0	2.1	87	1.1	1.2	0.4	2.7
Freshwater Angling for Game Fish	119.6	9.6	93.9	7.6	116	3.0	1.4	0.6	4.9
Sea Angling from the shore	97.9	7.3	61.3	4.5	118	1.5	0.3	0.5	2.2
Sea Angling from boat	86.2	4.6	109.5	5.8	62	0.8	0.2	0.3	1.3
Sailing	159.1	9.4	52.2	3.1	148	10.6	0.8	0.9	12.3
Boating in the sea in Row boats, canoes etc	19.1	0.6	19.7	0.6	304	2.3	0.3	0.3	2.8
Boating in power boats etc in the sea	27.1	0.7	55.6	1.4	74	1.6	0.3	0.0	2.0
Cruising, Boating on Inland Waterways	97.0	4.2	147.8	6.3	211	4.6	0.5	1.3	6.4
Swimming in the Sea	14.4	5.1	43.9	15.5	312	49.7	5.8	7.4	62.9
Water Skiing, Jet Skiing	685.2	13.2	234.7	4.5	50	0.0	0.0	0.0	0.1
Surfing, Sail boarding	63.5	1.1	82.6	1.5	628	2.9	0.7	1.0	4.6
Scuba Diving, Snorkelling	532.7	4.8	113.0	1.0	137	2.8	0.5	0.3	3.5
Other Sea Sports	36.9	0.3	61.9	0.5	43	0.0	0.0	0.0	0.1
Whale/Dolphin Watching	58.3	0.6	23.0	0.2	155	0.6	0.1	0.1	0.8
Bird Watching in Coastal areas	0.7	0.0	4.5	0.1	264	0.6	0.0	0.2	0.8
Visiting Nature Reserves etc. in Coastal Areas	16.0	0.7	38.5	1.7	180	1.3	0.2	0.1	1.7
Other trips to the beach or seaside	10.1	11.5	58.1	66.0	247	76.8	11.6	27.8	116.2
Other trips to the islands	27.2	0.9	44.9	1.5	159	2.2	0.5	0.7	3.4
Total		81.0		123.9		162.4	24.4	41.9	228.7

Source: ESRI, 2003, National Water-Based Survey (Discussed in Chapter 4)

Table: Estimated employment supported by marine leisure activity in the year preceding the survey

Activity	Euro ms.	% of GNP	Employment	
			Direct Employment	Direct+Indirect
Freshwater Angling for Coarse Fish	11.2	0.010	175	288
Freshwater Angling for Game Fish	22.1	0.020	347	569
Sea Angling from the shore	14.0	0.012	221	362
Sea Angling from boat	11.6	0.010	183	300
Sailing	24.7	0.022	388	636
Boating in the sea in Row boats, canoes etc	4.1	0.004	64	105
Boating in power boats etc in the sea	4.0	0.004	63	103
Cruising, Boating on Inland Waterways	16.9	0.015	265	435
Swimming in the Sea	83.5	0.074	1,312	2,152
Water Skiing, Jet Skiing	17.7	0.016	279	457
Surfing, Sail boarding	7.2	0.006	113	186
Scuba Diving, Snorkelling	9.4	0.008	148	242
Other Sea Sports	0.8	0.001	13	21
Whale/Dolphin Watching	1.6	0.001	25	41
Bird Watching in Coastal areas	0.9	0.001	14	23
Visiting Nature Reserves etc. in Coastal Areas	4.0	0.004	63	104
Other trips to the beach or seaside	193.7	0.171	3,043	4,990
Other trips to the islands	5.8	0.005	92	150
	433	0.383	6,807	11,164

Source: ESRI, 2003, National Water-Based Survey (Discussed in Chapter 4)

Appendix 13 **Input-Output Methodology Notes, Dr. Richard Moloney (2008), UCC, Ireland.**

Input Output Methodology

This section provides a description of the input-output modelling techniques. The conventional interpretation of input-output is of models characterised by unemployment and excess capacity, that is a passive supply framework, imperfect competition and a short-run focus. Input-output assumes fixed relative prices, or zero response to changes in relative prices. There is no simultaneous calculation of prices and quantities.

An input-output model is one in which inter-industry linkages are explicitly specified, described by the United Nations Statistical Office (1968: 7) as: a theoretical scheme, a set of simultaneous linear equations in which the unknowns are the levels of output of various branches, and in which the parameters are empirically estimated from the information contained in the input-output table.

Central to the use of input-output models is the assumption that input demand is a fixed proportion of total output. Any increase in total output will lead to a specific increase in each input category used in the production of that output. The technical coefficient for any sector (a_{ij}) gives the input required from sector i to produce a unit increase of sector j 's output.

$$a_{ij} = z_{ij}/X_j \quad (1)$$

where

z_{ij} = total output from sector i used as an input in sector j

X_j = total output of sector j .

An input-output model is based on the use of data organised in the form of an input-output table. This table provides a picture of the structure of an economy at a given time. The table itself is useful as a data source, independent of the technological assumptions used to motivate a Leontief model.

An input-output table describes the various flows of inputs into the productive process and matches these with outputs which are consumed in final demand. It represents the productive structure of an economy at a given point in time. The table shows the inter-industry transactions, the final demand, and the primary input sections. An expenditure by one agent must be an income for another agent and total expenditure must equal total income.

An input-output model makes behavioural assumptions. The first assumption is homogeneity: each sector produces a single output with fixed input structure. This means that all products of a sector are either perfect substitutes for each other or are produced in a fixed proportion to each other and there is no substitution between products of different sectors. The amount of each input used by a sector is in fixed proportion to the output produced by that sector. There is a fixed relative price structure and at these relative prices there is an infinite supply of the factors of production at the prevailing level of factor prices.

Taking a flow of intermediate goods from sector i to sector j as z_{ij} , production in sector i as X_i , the price of output in sector i as P_i and final demand for output from sector i as F_i , then the value of output produced by sector i is

$$P_i X_i = \sum_j P_j z_{ij} + P_i F_i \quad (2)$$

Given that

$$a_{ij} = z_{ij}/X_j \quad (3)$$

is a fixed technical coefficient matching the output in sector j with amounts of inputs from sector i . Assuming the prices of goods i and j are P_i and P_j respectively then

$$P_i a_{ij}/P_j = P_i z_{ij}/P_j X_j \quad (4)$$

Rearranging and substituting equations 2 into equation 4 gives

$$X_j = \sum_i a_{ij} X_i + F_j \quad (5)$$

Equation 5 indicates that total output is the sum of products for intermediate use and output which is consumed in final demand. If A represents the matrix of technical coefficients a_{ij} , X represents the matrix of gross output and F represents the matrix of final demand from domestic and foreign institutions, then equation 5 can be rewritten as

$$X = AX + F \quad (6)$$

Equation 6 can be solved for X giving

$$X = (I - A)^{-1}F \quad (7)$$

The input-output model and solution shown above assume that the final demand sector is exogenous to the system and there is no feedback into final demand after the initial stimulus. This type of structure, which we use, is called an open input-output model.

Appendix 14 Roundstone Seaside Business Listing

Name Business	Type	Contact
Caravan Park Gurteen	(S) Beach Caravan Park	Dinny O'Keefe
Roundstone House Hotel	(L) Hotel & Restaurant	Diarmaid Vaughan
Eldons Hotel & Beola Restaurant	(L) Hotel & Restaurant	Lorraine Cunningham
J Woods	(M) Butchery & Grocery - only family owned grocery	Seamus Lowry
St Joseph's B&B	(S) B&B - same owner as Woods shop	Christina Lowry
Silas	(S) Gift Shop Crafts & Jewellery	Sila McGee
O'Dowds	(L) Seafood Restaurant & Bar	Nicholas & Niall Griffin
Joanne's	(S) Clothes & Gifts	Joanne Conneely Cathy White & Emer
The Dalkey Design Co.	(S) Antiques	King Philip Keane & Tomas
The Shamrock Lodge	(M) Bar	Griffin Michael Reynolds &
Ferron	(M) Newsagent, Grocery, Petrol & Post Office	Sam Reynolds
Ryans Bar & Coffee Dock	(M) Bar, Bar Food & Coffee Shop	Dara Gavin (Leased by)
Northern Star	(S) Gallery & Studio	Rosie McGurran Pat & Margaret
Roundstone Sea Angling	(S) Sea Angling Boat & Gear	Connelly
Harbour View House B&B	(S) B&B - same owner as Sea Angling	

Note: (S) Small, (M) Medium, (L) Large

Source: Ginty, 2007.

Appendix 15 Ocean Adventure Schools Programme 2008-2009, Ireland.

www.letsdoitschools.com



Lesson books and active learning activities available separately on a CD-ROM. Contact author carina.ginty@gmit.ie.

Appendix 16 AENP Map, South Africa



Source: Addo Elephant National Park, official website available at <http://www.addoelephant.com/parks/addo/tourism/map.php> (accessed December, 2009)