



www.surfaroundireland.com

The Impact of Surfing on the Local Economy of the Lahinch Area, Co. Clare, Ireland

**Neil Cooney,
BSc Spatial Planning, M.I.P.I.**

November 2010



www.westcoastsurfclub.com

Table of Contents

Table of Contents	II
Acknowledgements	III
Introduction	1
Literature Review	3
Methods	9
Results	13
Discussion	18
Literature Cited	21
Appendix A	22
Irish Surfer Survey	22
Appendix B	26
Overseas Surfer Survey - Visitors To Ireland From Abroad	26

Acknowledgements

I would like to thank all who completed the surfer surf without these participants this report would not have been possible. Equal appreciation is given to all surf shops, clubs and businesses who distributed the survey. A special thanks to Lahinch Surf Shop and www.discoverbundoran.com for their help in making people aware of the survey and to www.boards.ie and www.corksurf.com for allowing a link to the survey on their surfing forums.

Introduction

This study focuses on the general area around Lahinch town and includes nearby villages and towns such as Doolin approximately 20km to the North and Doonbeg approximately 30km to the South and inland towns such as Miltown Malbay and Ennistimon. The study area will be referred to as the 'Lahinch Area' hereon.

The Lahinch Area is located to the West of County Clare and up until the last decade the majority of visitors to the area were attracted by golf, the Burren and the Cliffs of Moher, with a ferry operation to the Aran Islands located at Doolin.

In the past ten years this trend has somewhat changed with the activity of surfing being the predominant year round activity in the area. In 2005 surfing in this area made international news for the large waves surfed at the Cliffs of Moher called Aileens. A documentary was soon released in 2008 called 'Waveriders' detailing the surfing activity in the area with a particular focus on this new wave at the Cliffs of Moher while Allied Irish Bank included local surfer John McCarthy surfing this wave in their television advertisements.

The wave at Crab Island is thought to be Ireland's answer to famous waves in Hawaii such as 'Pipeline'. It has been acknowledged by surfers the world over as a top class wave since the 1970's with numerous feature articles in surf publications across the globe. This is a unique, rare and highly regarded wave, is known to be the Jewel in the Crown of Clare surfing and without a doubt should be preserved for future generations.

There is a combined population of approximately 2,500 between the towns of Lahinch, Doolin, Ennistimon, Miltown Malbay, Spanish Point and Quilty and Doonbeg.¹ A major source of revenue to this region is tourism.

The Lahinch Area has a wide variety of waves with beginner beaches such as Lahinch and Spanish Point where many people receive lessons and coaching. In addition there

¹ CSO Census Report 2006. http://www.cso.ie/census/documents/census2006_Table_7_and_12.pdf

are numerous more advanced spots called 'reef's' which offer more challenging conditions for the more experienced surfers. The area is also home to big wave surfing at the foot of the Cliffs of Moher and this can be attempted either by paddling into the wave or using a jet ski to tow the surfer into the wave. These jet skis are launched at Doolin harbour. At Doolin there are two top class waves Doolin Point and Crab Island, the latter being noted world wide as one of the top such waves in the world. The combination of all these different types and size of waves makes the Lahinch Area a very attractive surfing destination.

In June 2010 Clare County Council proposed the construction of a new pier at Doolin to accommodate ferries travelling to the Aran Islands. The planning process for this project is on-going and it is on foot of that proposed project that this economic report was undertaken to illustrate the economic importance of the surfing to the Lahinch Area.

It is feared that the proposed pier will destroy the quality of the surfing waves at Doolin through changes in currents and the introduction of reflective waves towards the wave at Crab Island and Doolin Point. The proposed pier will also interfere with the safe access surfers currently enjoy when paddling out to the wave at Crab Island.

Literature Review

Literature regarding surf tourism is not widely available as the economic impact of this industry on local towns and villages is only now becoming recognised. Universities in New Zealand, Australia and the U.S. are offering degrees and courses in surf industry management and with an increase in such qualifications and expertise it is anticipated that the amount of information regarding surf tourism will become more widely available.²

According to the International World Games Association, “surfing is practiced in basically all the countries in the world that are bordered with water and even in some landlocked countries such as Switzerland. The total number of licensed surfers is over 100,000 and it is estimated that there are more than 20 million recreational surfers worldwide.”

There are at least 50,000 surfers in Ireland³ and it is anticipated that this number will continue to grow at a rapid pace. Adventure tourism is on the rise worldwide with a recent UK study estimating that it will grow by 24 per cent worldwide by 2013.⁴

The surfing industry has seen a rapid growth across the world and Ireland has been no different. Major surfing stars such as Kelly Slater and Mick Fanning hold million dollar sponsorship contracts, with companies such as Billabong, Quiksilver, Ripcurl, etc. leading the way in the commercial side of the industry.

Ireland itself has many sponsored surfers from the young stars of tomorrow to other top names such as Fergal Smith, Richie Fitzgerald, Al Mennie, John McCarthy, etc.

Surfing has turned into a billion euro industry worldwide and its popularity in Ireland has been recognised by bodies such as the Irish tourism board with a large media

² The Impact of Surfing on the Local Economy of Mundaka, Spain, Commissioned by Save The Waves coalition.

³ The Irish Surfing Association, www.isasurf.ie

⁴ Irish Times Newspaper, Saturday 13th November 2010.

campaign in recent months focusing on surfing culture and the attractiveness of the activity.

Research in this area is slim with tourism boards and local government agencies neglecting to record the economic impact on towns and villages and surf visitation numbers to the country.

The adventure tourism sector which surfing is included in attracts almost a million overseas visitors to Ireland and is worth approximately €1.1 billion to the Irish economy.⁵

Australia, New Zealand and the UK are to date the most progressive in their surf tourism development. At least three artificial reefs (Narrowneck, Cables, and Bagarra) have been or are planning to be built along the coasts of Australia for the intended purpose of developing the surf and general tourism markets. The U.K. have completed the first European artificial reef in Boscombe. This reef is estimated to bring an economic impact of €10 million annually to the area and support an additional 60 full time and 30 part time jobs.⁶

A report on *Tourism and the Surf Coast Shire*, Australia, focuses on how developing the surf image of the area can positively impact the local economies. In 1995 the Rip Curl Pro at Bells Beach, part of the Surf Coast Shire, “attracted 20,050 individual visitors who spent an estimated \$860,000 on surfing merchandise and had an estimated total increase in direct expenditure for the shire of \$2.11 million” (Ernst and Young 1995).⁷

In September 2011 the European Surfing Championships will be staged in Bundoran, Co. Donegal. This event will bring many overseas visitors and will highlight the

⁵ Failte Ireland, Research & Statistics, Adventure and Activity www.failteireland.ie

⁶ The Impact of Surfing on the Local Economy of Mundaka, Spain, Commissioned by Save The Waves coalition.

⁷ The Impact of Surfing on the Local Economy of Mundaka, Spain, Commissioned by Save The Waves coalition. http://www.savethewaves.org/sites/default/files/docs/Mundaka_Final_lock.pdf

quality of surfing in Ireland. The nine day event will be the biggest surfing competition to be held in Ireland.

On Monday 8th November 2010 a number of surfers ventured out to sea to surf waves up to 50ft high on the North West Coast of Ireland, the wave is known as 'Prowlers'. The photographs and stories of the occasion went worldwide through all media outlets. Surfing in Ireland received unprecedented coverage worldwide as a result of this wave.

Fáilte Ireland's manager of marine and countryside pursuits Ethna Murphy said they already had plans to market Ireland as a surfing destination next year in advance of the championships, but the surfers who found Prowlers had given them priceless publicity.

"Surfing is one of our good news stories. It is a sector that is growing and the people involved in it have an entrepreneurial spirit. We are working with them to get involved with traditional B&Bs and self-catering places to help market Ireland as a prime cold water surfing destination," says Murphy.⁸

The Labour Party Paper 'Labour's Proposals to Sustain and Develop Tourism' May 2010 states:

"Niche markets such as surf tourism, golf tourism, and adventure tourism are areas where the Irish tourism product can be expanded. Enterprising marketing strategies that target niche markets in which Ireland has a competitive advantage would bring diversity to the customer. We are already achieving this in golf tourism, and it is time to bring this success into other niche markets.

An increase in surf tourism in Ireland would create more employment and stimulate the economies of rural areas located near surfing hotspots. There are over 10 million surfers worldwide and each year the number grows by 12-16%."⁹

⁸ Irish Times Newspaper, Saturday 13th November 2010.

⁹ Labour's Proposals to Sustain and Develop Tourism, May 2010
<http://www.labour.ie/download/pdf/tourism.pdf>

A Seanád debate on Thursday 4th March 2010 regarding the Tourism Industry included the following statement from Dominic Hannigan (Labour):

“We also need to examine growth areas such as the surfing community. Many of our coastal areas are particularly well suited to surfing. If one wants to see the impact it can have on community, one should visit Newquay in Cornwall which was once quite depressed economically but has been transformed by the advent of surf tourism. Many coastal areas in Donegal and further south are very well suited and we should consider how we can attract the younger fraternity to our shores.”¹⁰

In recent years surfers in Bundoran have fought off proposals for an extension to the existing Pier in the town. The pier is located adjacent to one of the most famous surf breaks in the Country; ‘The Peak’. The development would have had a serious detrimental impact on this wave. The positive consequences of preserving such a wave have come to fruition with the recent announcement that Bundoran is to stage the European Surfing Championships in 2011.

Proposed development projects can threaten breaks as with a proposed pier extension at Doolin and the proposed marina development in Bundoran. “As most surfers know, The Peak has been under threat of a marina development,” explains Richie Fitzgerald when talking about the proposed development in Bundoran. “The Irish Surfing Association, local surfers and concerned residents, using a number of tactics, have managed to fight off any development so far. As the years go on and the visible popularity of and financial benefit of surfing to this area become more obvious, the marina project looks less and less likely. But when dealing with big money and politics you let your guard down at your peril, so the ISA and locals have been keeping the pressure on the local council to drop the idea entirely.”¹¹

The waves at Doolin Point and Crab Island are currently threatened by the proposed development of a large pier to cater for ferries. Proper planning encourages such developments to be planned and constructed in accordance with the principles of

¹⁰ Seanad debate on Thursday 4th March 2010 regarding the Tourism Industry.

<http://www.kildarestreet.com/sendebates/?id=2010-03-04.192.0>

¹¹ Footprint Surfing Europe, Chris Nelson & Demi Taylor. www.footprintbooks.com

sustainable development. Sustainable development has been defined in many ways in different countries, but the most frequently quoted definition is from ‘*Our Common Future*’, also known as the Brundtland Report:

*Sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs.*¹²

The question must be asked does the proposed development represent sustainable development? In an attempt to construct a large pier, one which is designed at a bigger scale than is actually necessary to cater for existing ferry operators, the Local Council may in fact compromise surfing for future generations.

The impact of development on surfing waves and the subsequent impact on the tourism sector has been documented in other countries. Such a detrimental development occurred in Mundaka, Spain.

Similar to the Lahinch Area Mundaka plays host to many nature based tourists but is probably better known for its surfing and its famous 400 metre long left hand wave naturally formed by a sandbar and known as the best such wave in Europe.

Historically known as a fishing village, Mundaka today has only two vessels that actively fish the surrounding waters. Surfing brings thousands of tourists to the small village, and the Billabong Pro Mundaka is one of only 12 stops on the prestigious World Championship Tour. On average it is estimated that surfing brings between five and fifteen thousand surfers to the small village every year with an additional twenty to thirty thousand attracted by the Billabong Pro Contest.

In 2004 a dredging project was needed to move the latest ship that was built in the village out to sea but an unfortunate side effect of this dredging was the destruction of the sandbar that shapes the wave. The dredging project which removed more than 243,000 cubic meters of sand from the Guernica Estuary and created sand dunes on shore opposite from where the waves break, changed the direction of the river flow and currents in the estuary which led to the erosion of the sandbar on the river bed and the disappearance of the wave. This resulted in the cancellation of the 2005 Billabong

¹² World Commission on Environment and Development (WCED). *Our common future*. Oxford: Oxford University Press, 1987 p. 43.

Pro contest. The wave began to rejuvenate during the summer of 2006 and although not fully back to its original form it was deemed healthy enough the 2006 contest.⁷

An economic report was commissioned following this incident to assess the Impact of Surfing on the Local Economy of Mundaka, Spain.

This report concluded:

“Mundaka is a perfect example of how a small rural coastal community can benefit from a well developed surf tourism market. The loss of Mundaka’s prize wave could have serious economic impacts on the village as well as on the surf community. Results here show that the potential economic impact, or loss to the region, could range from one million to more than four million dollars in total effects. At a visitation level of thirty-thousand the total economic impacts for expenditures is potentially more than three million dollars and the personal income at this level are potentially more than a million dollars. Even at the lower visitation levels the economic impacts are quite large for this small rural area with an estimated population of nineteen-hundred people.”⁵

The surfers in Mundaka and the surf tourism industry of this region were unlucky to have an impact on their renowned wave but are lucky that this wave has reformed to its original status.

The proposed pier at Doolin will be a permanent structure with no hope of the waves at Doolin Point and Crab Island rejuvenating once it is constructed. To ensure there is no impact on surfing in this region and to learn from the mistakes of others a pier design which will not impact on the waves must be the only design proposed.

Methods

This study measures the economic impact that surfing has in the Lahinch Area using Economic Impact Analysis. Economic Impact Analysis (EIA), as defined by Frechtling in 1994, traces the flow of spending associated with tourism activity in a region to identify changes in sales, tax revenues, income, and jobs due to tourism activity.¹³

To measure the total economic impact for a region, the *Direct*, *Indirect*, and *Induced Effects* of tourism spending in the impact region must be summed.

Direct effects are the changes in economic activity during the first round of spending. For tourism this involves the impacts on the tourism industries (businesses selling directly to tourists) themselves.

Secondary effects are the changes in economic activity from subsequent rounds of re-spending of tourism money. There are two types of secondary effects:

Indirect effects are the changes in sales, income or employment within the region in backward-linked industries supplying goods and services to tourism businesses. For example, the increased sales in linen supply firms resulting from more hotel sales is an indirect effect of visitor spending.

Induced effects are the increased sales within the region from household spending of the income earned in tourism and supporting industries. Employees in tourism and supporting industries spend the income they earn on housing, utilities, groceries, and other consumer goods and services. This generates sales, income and employment throughout the region's economy.

Total effects are the sum of direct, indirect and induced effects.¹⁴

¹³ Stynes, D., Economic Impacts of Tourism. 2000. Michigan State University, Department of Economics. www.msu.edu. 2007.

¹⁴ MGM2 Money Generation Model – Version 2. Michigan State University. <http://web4.canr.msu.edu/mgm2/default.htm>

An online survey was prepared to obtain spending data, surf locations, surf frequency, trip characteristics, etc. for the average surf market participant in Ireland. Questions ranged from “Where do you surf?” to “How often do you surf?” (See Appendix A).

The survey was sent to all surf shops, surf schools, surf clubs and surf related businesses in Ireland and was posted on two surfing forums in Ireland. The survey was also distributed to surfers on Facebook and posted on www.surfaroundireland.com.

The survey was open for approximately 6 weeks from the 20th September 2010 to 30th November 2010 and there were 262 respondents from the 32 counties of Ireland.

According to the Irish Surfing Association there are at least 50,000 surfers in Ireland. The respondents represented just over 0.5% of surfers in Ireland with a good spread of surfers of different ages and years surfing. 70% of the respondents have been surfing under 6 years while 30% have been surfing over 6 years.

Using the Money Generation Model V.2 Shortform (MGM2)¹⁴, the potential range of economic impacts from surfing in the Lahinch Area were assessed. The survey was undertaken countrywide with surfers from all counties participating. The results give accurate details as to the locations and frequency people surfed. It was estimated that 54% of the respondents surfed in the Lahinch area, this would represent 27,000 of surfers in Ireland.

These events were broken down into different categories based on the results of the survey. Four different categories were identified based on the accommodation they stayed in when in the Lahinch Area: 6% ‘Local’, 7% ‘Stay with Friend’, 64% ‘Camping/Hostel’ and 23% ‘Hotel/B&B’.

A generic rural multiplier given by MGM2 data spreadsheet was used to calculate secondary spending effects for the area. Multipliers capture the secondary effects (indirect and induced) of visitor spending on a particular area. Regions or areas with limited economic development and size and small population generally have small multipliers and larger regions with extensive economic development and bigger

population figures have larger multipliers. Economic multipliers and ratios are used to convert visitor spending to sales, income, and jobs in the region and to estimate secondary or "multiplier" effects.¹⁴

Sales is the Euro volume of a good or service produced or sold.

Income is the money earned within the region from production and sales. Total income includes Personal income : wage and salary income, including income of sole proprietor's profits and rents.

Jobs or employment is a measure of the number of jobs required to produce a given volume of sales/production. Jobs are usually not expressed as full time equivalents, but include part time and seasonal positions.¹⁴

The Money Generation Model 2 (MGM2) was originally designed by Michigan State University U.S. to measure economic impacts of recreation for different national parks and areas in the United States. The rural multiplier option was applied for the purpose of this report due to the sparse population size and the limited economic development in the area. It is assumed that leakages are quite high for smaller rural areas.

It has been assumed that MGM2 multipliers, even though calculated from U.S. Markets, would represent the potential secondary effects of spending in the Lahinch Area relatively well. However, given the current economic circumstances in Ireland at present, the Jobs and Income multipliers were reduced by approximately 15% to give a more accurate and conservative result.

In addition to the survey mentioned above, which was distributed to surfers in Ireland, a second survey was conducted and this was distributed to surfers overseas who have or intend to visit Ireland and surf while in the Country (Appendix B).

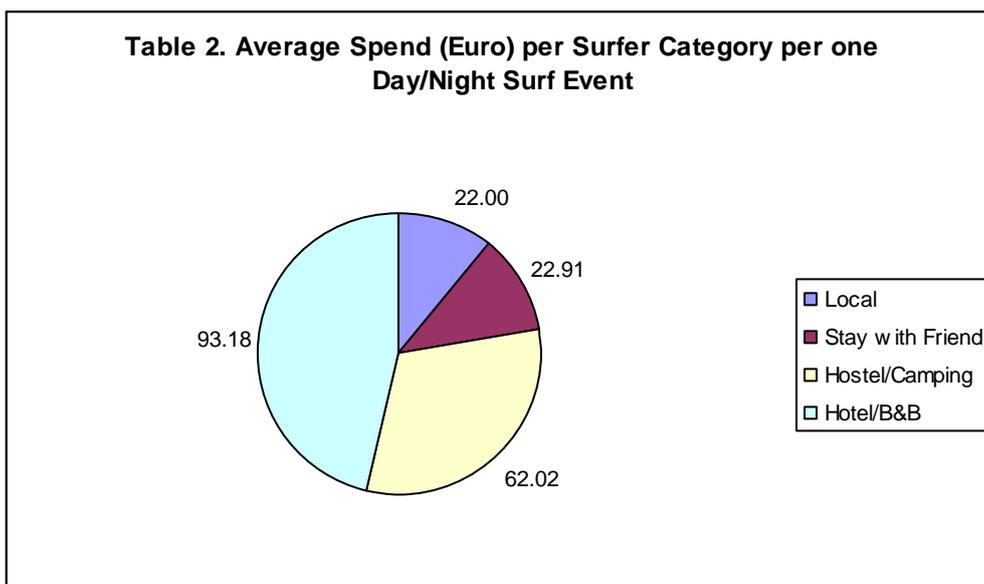
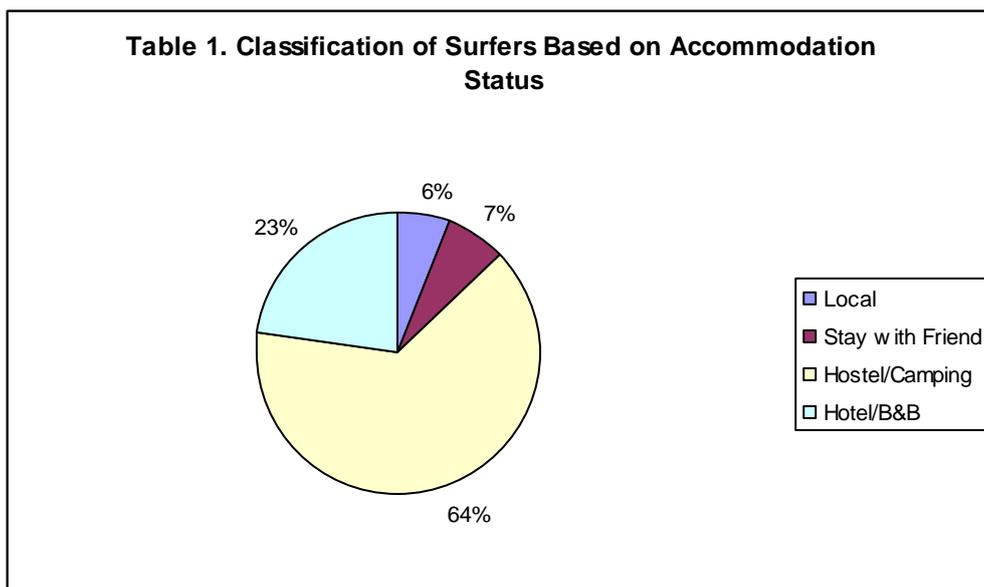
That survey was posted on surf forums in America and Europe, on www.savethewaves.org and also on www.surfaroundireland.com.

There were 49 respondents to this survey. This survey was conducted to establish the average spend by overseas visitors and to establish their opinion on development

potentially destroying top surfing waves in Ireland. The data is not used in the economic figures in this report as information regarding the number of visitors to Ireland for surfing is very vague and the introduction of inaccurate data would undermine the creditability of this final report. A copy of the survey conducted by overseas visitors is attached (Appendix B).

Results

The Economic Impact Analysis conducted on spending data was extrapolated across four types of surfers based on their accommodation circumstances. The four categories are 'Local', 'Stay with Friend', 'Hostel/Camping' and 'Hotel/B&B'. The representation of each category is illustrated in Table 1 below while the average spending per each category is outlined in Table 2.



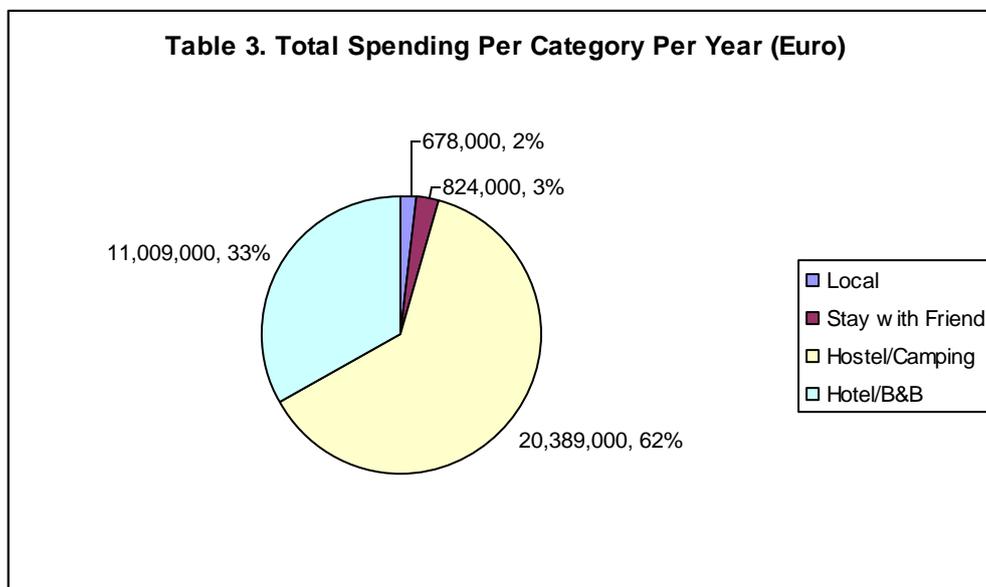
As illustrated in the charts above the most popular form of accommodation is 'Hostel/Camping' with the majority of surfers in the Lahinch Area travelling from

another location to surf. The average spend per surf event (one day & night) is lowest for the local surfer and highest for the surfer that stays in a hotel or B&B which is not surprising.

The average spend was calculated using data from the survey, in particular Question 11 ‘On A Typical Surf Weekend Away From Your Home (2 Nights & 2 Days) How Much Would You Spend On Accommodation, Food, Socialising, Etc?’.

It was estimated that 54% of the respondents surfed in the Lahinch area, and with an estimation of 50,000 surfers in Ireland this would represent 27,000 of surfers that surf in the Lahinch Area. Using the data of how frequently the surfer surfed it was established that with the 27,000 surfers that surf in the Lahinch Area there were 513,665 surf events i.e. the number of surfers that surf in the Lahinch Area multiplied by the frequency they surf there.

Using the MGM2 Shortform spreadsheet the total spend per category per year in the Lahinch Area was calculated as illustrated in Table 3 below.

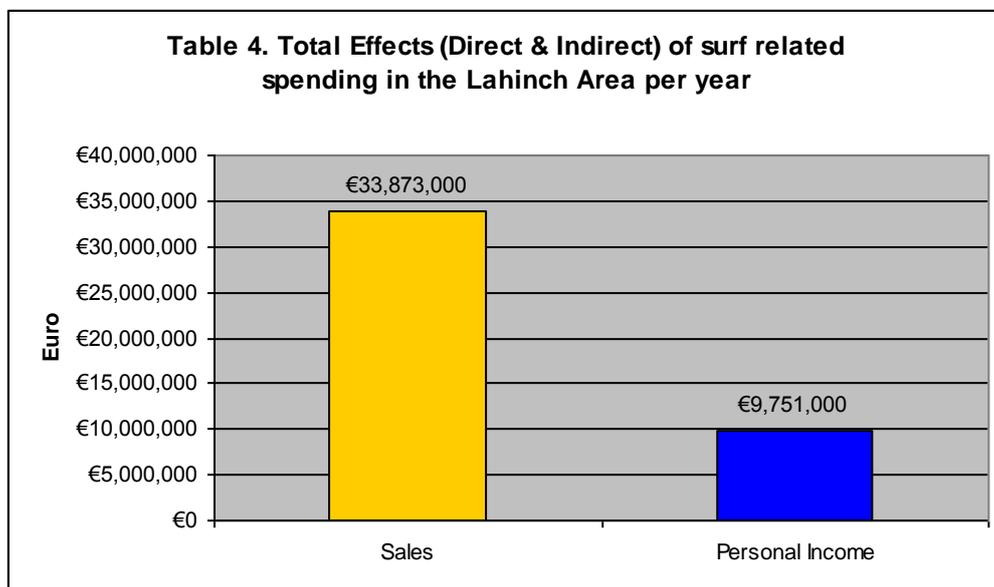


The total direct spending in the Lahinch Area is estimated to be €32,899,000 per year with the surfers that stay in a Hostel or that Camp contributing the most to the local economy. These figures represent the total direct spending in the Lahinch Area

however, not all of this spend is captured in the area and a certain percentage is leaked externally to other regions; it has been estimated that a conservative 78% of the total spend is captured in the Lahinch Area giving a figure of €25,661,000.

Rural multipliers were used to calculate the secondary effects of spending and were the same for each visitation level. The multipliers give an indication of the total effects in the Lahinch Area taking into account direct, indirect and induced effects of surfing in the Area.

Using the MGM2 Shortform calculation approach, on the basis that the area is 'Rural', the Total Economic Effects of surfing in the Lahinch Area has been established for 'Sales', 'Personal Income', and 'Jobs'. Rural Multipliers were utilised as it was assumed that the area is relatively secluded and therefore many items may not be manufactured within the study area. Items such as fuel, retail items, and food would, in the main, be manufactured and purchased from outside sources, resulting in leakage from the study area. Therefore, the results of this report are conservative and not exaggerated or skewed but represent the profile of the study area.



It has been estimated that surfing contributes a total of €33,873,000 to the economy of the Lahinch Area and this in turn results in a contribution to personal income totalling €9,751,000.

It has been established that the surfing contributes to approximately 667 jobs in the Lahinch Area. These jobs include seasonal, full time and part time jobs in all industries which local and visiting surfers would avail of such as shops, pubs, restaurants, petrol stations, hostels, B&B's, hotels, campsites, surf businesses, etc.

As stated above a second survey was prepared and undertaken by overseas visitors only, there were a total of 49 respondents to this survey. While the economic contribution of overseas surfers has not been included in this report the results of the survey are of relevance and provide an insight into the potential impact these visitors have on the Irish economy.

The survey undertaken by only overseas visitors provides some interesting facts and figures. Respondents were from 12 different countries including USA, Germany, New Zealand, Denmark, England and Canada. 80% of the respondents stated that on an average trip to Ireland they would spend over 5 days surfing, with 76% of respondents stating that surfing is the primary reason for their trip.

When asked if they would be as eager to visit Ireland to surf if top waves were being destroyed by development an astounding 90% of respondents said NO.

The average respondent spends approximately €200 per day/night in Ireland on accommodation, food, alcohol, attractions, clothes, surf gear, and transport with the majority of people stating that they would travel with 2 – 5 other people.

Some of the comments included in these surveys conducted by overseas visitors are of interest:

“Promote Surfing, we spend lots of money”

“I visit as many times as my budget allows. I always bring friends or my wife. If the ferry prices were cheaper I would come at every available opportunity...it is only 6 hours road time from my door in Newcastle to the west coast surf breaks! We will keep on visiting every year. You will be shooting yourself in the foot if you affect the wave at Crab Island.”

“Ireland is one of the last unspoilt surf wildernesses out there. It holds a special place in the hearts of every visitor who visits. The potential of the country in terms of surf facilities is huge.”

“Please don’t destroy this wave. It is one that I surf on my annual trip.”

“Listen to the locals, step away from the suit and see what lays on your doorstep and revel in the beauty and prospect of what already exists and the long term benefit it has to the area which causes no damage or harm. Move the idea elsewhere please.”

“Surfing is an infinite resource... That is, until waves are destroyed by short-sighted development.”

“Do not underestimate the travelling surfer: many of us are well-to-do professionals with money to spend.”

“It’s sad to think that this great wave break will be destroyed.”

Discussion

For hundreds of years our coastlines around the world have been utilised by the generation of the time, whether it be for fishing, transport, or recreation. In recent decades we have seen a burst in activity along our coastlines.

This increased activity brings with it increased development. These developments include hotel and resort developments, golf courses, piers, airports, roads, artificial reefs and housing developments. These developments are thought to bring economic prosperity, a better experience and a better standard of living for all. However, while it may be the intention of these developments to bring positive results with substantial economic benefits, existing markets and activities like surfing can be overshadowed and even totally destroyed in the process.

Ireland has seen unprecedented development in recent years, much of which has been badly planned and has resulted in serious negative impacts on communities and the environment. The time is now for sustainable development; this development should not compromise the receiving environment or the activities of others.

Surfing on a global scale has grown to become a multibillion Euro industry which includes the manufacturing and retail of surfing goods both clothing and equipment, media publications, rentals and instruction, accommodation, contests, etc.

It is hard to place a value on recreational activities such as surfing. What does it mean to people to surf? No specific economic value can be attributed but many will give you answers that would astound people not associated with the activity.

Surfers make huge sacrifices for surfing, people travel long distances at the drop of a hat to be on the coast when the perfect conditions arrive. The feeling and mental well being not to mention the health benefits of the activity should not be underestimated.

Taken into consideration the difficulty in illustrating to non surfers the joy of surfing this report has been prepared to show the economic benefit of surfing to the local economy of the Lahinch Area.

As highlighted earlier in this report the Lahinch Area offers something for every surfer and this is one of the reasons why it is such a popular location for surfers. Different levels and challenges of waves are located within a very short drive of Lahinch town and it is the combination of all these different waves which makes this such a unique area. The waves at Crab Island and Doolin Point are unrivalled and have been acknowledged the world over as being some of the best waves ever to be surfed. To destroy such a unique element of the overall Lahinch Area surfing experience would be seriously detrimental to surfers, and the local and national economy.

If the proposed development does not fully destroy the waves at this location to proceed with a development which would have even minor negative impacts on the waves would still have a disastrous impact on surf tourism and the perception people overseas have of surfing in Ireland and this Country as a whole. 90% of respondents to the overseas survey stated that they would not be as eager to visit to surf if they knew development was potentially destroying waves.

This report highlights the economic importance of surfing to the Lahinch Area and it has been established that it is worth approximately €33,873,000 to the economy. However, this figure is only reflective of surfers who live in Ireland and does not include the economic value of visiting surfers from outside the Country. It is considered that these overseas visitors contribute a great deal to the economy and this trend is set to continue and grow with the popularity of the activity increasing at a phenomenal rate.

The results and comments included in the Overseas Survey highlight the importance of these waves and the current reputation Ireland has as a friendly and top class surfing destination. To distort this image through inappropriate development would be damaging to the local economy of the Lahinch Area.

The value of surfing to this area is substantial and exceeds the conservative figures of this report which only includes the economic impact surfers in Ireland have on the area. An annual figure of €33,873,000 to this economy is considerable and will grow

over the years unless inappropriate development interferes with waves and the image foreign visitors have of this area and of Ireland.

Literature Cited

The Impact of Surfing on the Local Economy of Mundaka, Spain, Commissioned by Save The Waves coalition.

http://www.savethewaves.org/sites/default/files/docs/Mundaka_Final_lock.pdf

The Irish Surfing Association, www.isasurf.ie

Irish Times Newspaper, Saturday 13th November 2010. www.irishtimes.com

Irish Times Newspaper, Saturday 13th November 2010. www.irishtimes.com

Failte Ireland, Research & Statistics, Adventure and Activity, www.failteireland.ie

Labour's Proposals to Sustain and Develop Tourism, May 2010

<http://www.labour.ie/download/pdf/tourism.pdf>

Seanad debate on Thursday 4th March 2010 regarding the Tourism Industry.

<http://www.kildarestreet.com/sendebates/?id=2010-03-04.192.0>

Footprint Surfing Europe, Chris Nelson & Demi Taylor. www.footprintbooks.com

World Commission on Environment and Development (WCED). *Our common future*. Oxford: Oxford University Press, 1987 p. 43.

Stynes, D., Economic Impacts of Tourism. 2000. Michigan State University, Department of Economics. www.msu.edu. 2007.

MGM2 Money Generation Model – Version 2. Michigan State University.

<http://web4.canr.msu.edu/mgm2/default.htm>

Appendix A

Irish Surfer Survey

Survey Brought To You By www.surfaroundireland.com
Email: surf@ireland.com

* 1. Gender

- Male
- Female

* 2. Age

- Under 20
- 20 - 30
- 30 - 40
- 40 and over

3. How Long Are You Surfing?

- < 1 Year
- 1 - 3 Years
- 3 - 6 Years
- Over 6 Years

4. How Often Do You Surf?

- Have Just Taken It Up
- Once A Month
- Twice A Month
- Every Week
- A Few Times A Week

Other

* 5. Do You Have Your Own Surf Gear?

- Yes
- No

* 6. Have You Ever Had Surf Lessons From A Qualified Surf School / Instructor?

- Yes

No

* 7. What County Do You Live In?

8. Where Do You Surf? (Multiple Answers Accepted)

- Bundoran Area
- Sligo Area
- Lahinch Area
- Kerry Area
- Cork Area
- Waterford Area
- Portrush Area

Other

* 9. Do You Surf Alone?

- Yes
- No
- Sometimes

10. What Accommodation Do You Stay In When Surfing Away From Home?
(Multiple Answers Accepted)

- Hostel / Surf Lodge
- Hotel
- B&B
- Camping
- Friend's House

Other

* 11. On A Typical Surf Weekend Away From Your Home (2 Nights & 2 Days) How Much Would You Spend On Accommodation, Food, Socialising, Etc?

- Under 50 Euro
- 50 - 100 Euro
- 100 - 200 Euro
- Over 200 Euro

Only Surf Locally

12. Where Do You Buy Your Surf Related Gear/Clothing? (Multiple Answers Accepted)

- Online (Irish Websites)
- Online (Foreign Websites)
- Surf Shops In Ireland
- Second Hand

Other

* 13. What Is Your Motivation When Buying Surf Gear/Clothing?

Price

- Currently 0/5
- [1](#)
- [2](#)
- [3](#)
- [4](#)
- [5](#)

Supporting Irish Businesses

- Currently 0/5
- [1](#)
- [2](#)
- [3](#)
- [4](#)
- [5](#)

Buying An Irish Brand

- Currently 0/5
- [1](#)
- [2](#)
- [3](#)
- [4](#)
- [5](#)

Convenience

- Currently 0/5
- [1](#)
- [2](#)

- [3](#)
- [4](#)
- [5](#)

Customer Care/Advice

- Currently 0/5
- [1](#)
- [2](#)
- [3](#)
- [4](#)
- [5](#)

* 14. Do You Think There Is Enough Information On Surfing In Ireland; Generally, For Beginners, For Tourists, Etc.?

- Yes
- No

15. If Answered No: What Information Would You Like To See Available?



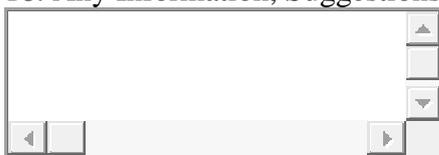
* 16. Would You Welcome A World Surfing Competition Staged In Ireland With Top Surfers Such As Kelly Slater & Mick Fanning?

- Yes
- No

* 17. Are You Interested In Irish Surfing News, Surf Pics & Vids, Surf Mags, Surf Stories, Interviews, Etc. Or Do You Just Rather Get On With Your Own Surf?

- Interested
- Not Interested

18. Any Information, Suggestions Or Thoughts On This Topic?



Contact Email (If Desired)

Appendix B

Overseas Surfer Survey - Visitors To Ireland From Abroad

Survey Brought To You By www.surfaroundireland.com
Email: surf@ireland.com

* 1. Gender

- Male
- Female

* 2. Age

- Under 20

- 20 - 30
- 30 - 40
- 40 and over

3. How Long Are You Surfing?

- < 1 Year
- 1 - 3 Years
- 3 - 6 Years
- Over 6 Years

* 4. What Country Do You Live In?

5. How Often Do You Visit Ireland?

- Have Not Visited Yet
- Visited Once
- Visit Annually
- Visit 4 times A Year
- Visit More than 4 Times A Year

Other

* 6. On Your Visit To Ireland How Many Days Would You Spend / Hope To Spend Surfing?

- 1 Day
- 2 Days
- 2 - 5 Days
- 5 + Days

Other

7. On Average How Long Do You Stay Or Intend To Stay In Ireland?

- 2 Days
- 2 - 4 Days
- 1 Week
- 1 - 2 Weeks
- Over 2 Weeks

Other

* 8. Was / Is Surfing The Primary Purpose Of Your Trip?

- Yes
 No

If Answered No What Was Your Primary Reason For Visiting?

* 9. Do You Regard Ireland As A Top Surfing Destination With Quality Waves?

- Yes
 No

10. Would You Be As Eager To Visit Ireland To Surf If Top Waves Were Being Destroyed By Development?

- Yes
 No

Thoughts Or Comments On This?

11. Where In Ireland Have You Surfed? (Multiple Answers Accepted)

- Have Not Visited Yet
 Bundoran Area
 Sligo Area
 Lahinch Area
 Kerry Area
 Cork Area
 Waterford Area
 Portrush Area

Other

12. What Accommodation Do You Stay In When You Visit? (Multiple Answers Accepted)

- Hostel / Surf Lodge
- Hotel
- B&B
- Camping
- Friend's House
- Self Catering
- Camper Van

Other

* 13. How Much Would You Spend On Accommodation Per Night While In Ireland ?

- Under 20 Euro
- 20 - 25 Euro
- 25 - 50 Euro
- Over 50 Euro

* 14. How Many People Do You Travel With Or Intend On Travelling With?

- On Your Own
- 1 person
- 2 people
- 2 - 5 people
- Over 5 people

* 15. How Much Do You Spend On The Following Per Day/Night On Your Visit?

	< €20	€20 - €30	€30 - €50	€50 - €100	Over €100
Food	<input type="checkbox"/>				
Alcohol	<input type="checkbox"/>				
Tourist Attractions	<input type="checkbox"/>				
Clothes / Gifts	<input type="checkbox"/>				
Surf Gear Or Activity	<input type="checkbox"/>				
Transport	<input type="checkbox"/>				

* 16. Do You Buy Surf Gear / Clothing While In Ireland?

- Yes
- No

If Yes What And How Much Spent?

* 17. Do You Think There Is Enough Information On Surfing In Ireland For People Visiting From Abroad?

- Yes
- No

If Answered No: What Information Would You Like To See Available?

* 18. Would You Welcome A World Surfing Competition Staged In Ireland With Top Surfers Such As Kelly Slater & Mick Fanning?

- Yes
- No

* 19. Are You Interested In Irish Surfing News, Surf Pics & Vids, Surf Mags, Surf Stories, Interviews, Etc. Or Do You Just Rather Get On With Your Own Surf?

- Interested
- Not Interested

20. Any Information, Suggestions Or Thoughts On This Topic?

Contact Email (If Desired)