

# Waterville Angler Survey

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Inland Fisheries Ireland, NUI Galway, the Economic & Social Research Institute & the Waterville  
Lakes and Rivers Trust

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## Executive Summary

The Waterville Angler Survey is the result of collaboration between Inland Fisheries Ireland (IFI) and the Waterville Lakes and Rivers Trust (WLRT) with important contributions from the Economic and Social Research Institute (ESRI) and the National University of Ireland, Galway (NUIG). The aim of this study was to evaluate the economic contribution made by anglers to the Waterville area as compared with non-angling visitors.

Angling tourism provides a significant contribution to rural and peripheral economies in Ireland yet angling, by its very nature, can go unnoticed as the key activity for which many visitors return to an area. The very places that anglers visit are often of low population densities, far removed from urban centres and, as such, the anglers' activities are not noted in the same manner as other major Irish tourism attractions such as golfing, walking and cycling where the participants are highly visible. This is even more relevant where, as shown by respondents to this survey, the anglers have been visiting an area for many years and they are highly independent in terms of knowing the area and therefore requiring less assistance from local residents and service providers.

Over 207 anglers completed the survey over the course of the 2015 angling season; this survey gathered data on angler participation rates, expenditures and frequency of visit to the area among other things. The key findings of the Waterville Angler Survey reinforced the findings of other Irish angling studies which have shown that:

- Anglers tend to stay for longer than non-angling holidaymakers.
- Anglers tend to spend considerably more money during their angling holidays.
- Anglers prefer to visit their chosen locations outside of the key Irish tourism periods of July and August thereby extending the season for tourism service providers. The months of April, May, June, September and October provide some of the best angling opportunities in Ireland and anglers will plan their trips to coincide with these peak angling periods.
- Anglers develop a relationship with an area and the fisheries in that area; this can lead to anglers taking multiple trips per year to their preferred angling holiday location and, as is shown in this study, the likelihood of repeat visits for many years in the future is increased dramatically.
- Anglers have been shown to act as custodians of the countryside and their understanding of the issues that affect the environment ensure that conservation and protection of the fisheries that they visit become of paramount importance to them.

The fisheries of Waterville and Ballinskelligs bay are of significant tourism, environmental and heritage value and they should be promoted and protected as such by the angling and tourism stakeholders in the area. Any loss or reduction in stocks of the major angling species of sea trout, salmon and sea bass could potentially have a drastic knock-on effect which would severely impact on tourism service providers and household incomes in the Waterville and Ballinskelligs bay area.

## 1. Introduction

Waterville is a village on the Iveragh Peninsula on the scenic ring of Kerry in the south west of Ireland. The town is sited on a narrow isthmus, with Lough Currane on the east side of the town, Ballinskelligs Bay on the west and the Waterville River connecting the two.

Lough Currane, which covers an area of approximately 1,011 hectares (c 2,500 acres), is the largest and best known of a series of lakes that are famous for their quality sea trout fishing. To the north east of lough Currane are a series of smaller lakes which include Lough Namona, Cloonaghlin Lough, Iskanamacteery and Derriana Loughs; these are all interconnected by the Cumberagh and Owengarriff Rivers. To the south of these lakes is Capall Lough (Isknaghany Lough) which also lies to the east of Waterville town and is connected to lough Currane by a short river known as the Capall River. The sea trout caught on lough Currane are renowned for their size and fighting ability. The best sea trout fishing is from April to September with many of the larger fish being taken between April and June. Sea trout to over 10 lbs. (4.5 kg) are recorded annually from this famous lake as well as many which are above the specimen size (6lbs/2.5kg).

In addition to its sea trout run, Currane also gets a run of salmon throughout the season with some fish being caught as early as January. The runs of salmon and sea trout are dependent on the water levels on this spate river system. Water and weather conditions can impact greatly on the quality of fishing. The lough Currane system is well developed with access to boats and guides being readily available to the tourist angler.

Lough Currane drains directly into the sea at Ballinskelligs Bay on its western shore through a short private stretch of river known as the Waterville River on which the famous Butler's Pool is located.

Ballinskelligs bay is also well known for its angling potential; good stocks of bass and mullet inhabit the bay along with an abundance of smaller fish species such as sprats and sandeels depending on the season. These bait fish provide an important food source for predatory species such as the sea trout and bass as well as the large colonies of gannets which nest on the nearby Skellig islands. Other species such as pollack, flounder, dogfish, wrasse and plaice are also present in the bay with the possibility of a variety of other deep water species present a little further offshore. More exotic species such as albacore tuna are also present offshore at certain times of the year.

Following a request from the Waterville Lakes and Rivers Trust, Inland Fisheries Ireland (IFI), with assistance from the Economic and Social Research Institute (ESRI), drafted a survey designed to gather information from anglers who visit Waterville to fish. A total of 207 angling surveys were completed over the course of the 2015 angling season (March through September approximately) via the online survey tool SurveyMonkey.com.



Of these 207 anglers approximately 75.5% came from the island of Ireland, 17.5% from Great Britain (GB), 5% from mainland Europe and 2% from other overseas areas.

This report contains an overall analysis of all anglers who participated in the survey. In some instances the survey results for the two largest categories of angling visitors, namely Irish & Northern Irish (NI) holiday anglers and visitors from Great Britain (GB), are analysed in more detail.

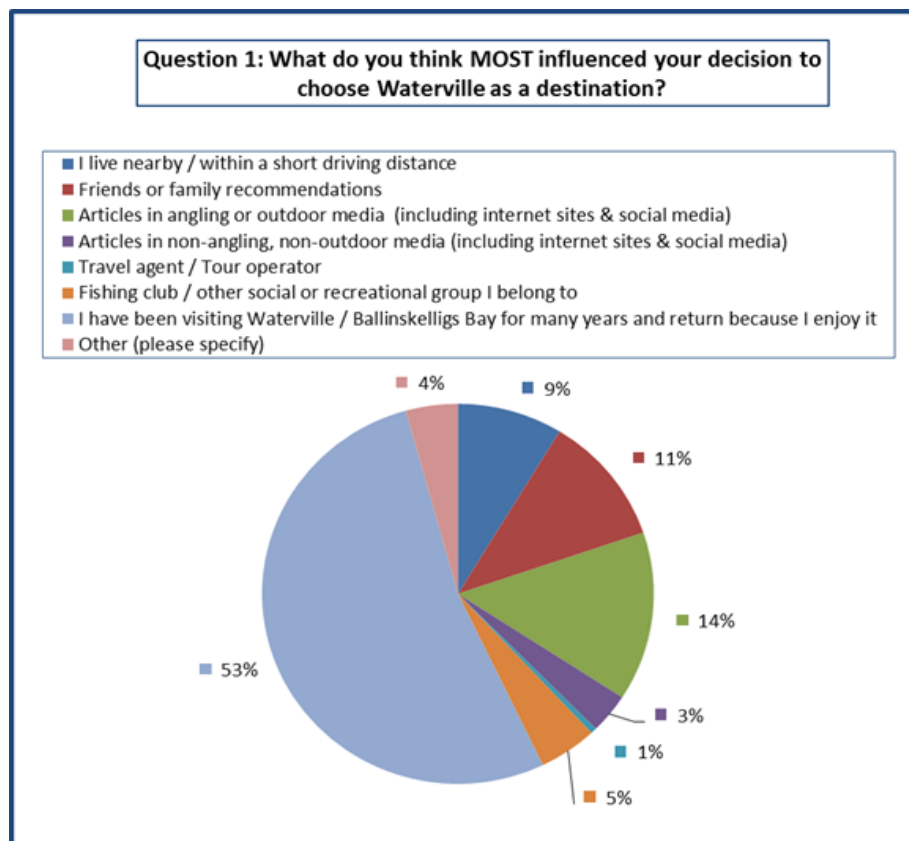
## **2. Methodology**

The research for the study of the Waterville fishery was carried out over a six month period designed to coincide well with the peak of angling activity in Waterville (March-September). An angler survey was drafted which was designed to gauge anglers' attitudes, opinions, motivations, participation rates and expenditure patterns as a means of assessing the main driving factors behind angler participation in angling in Waterville.

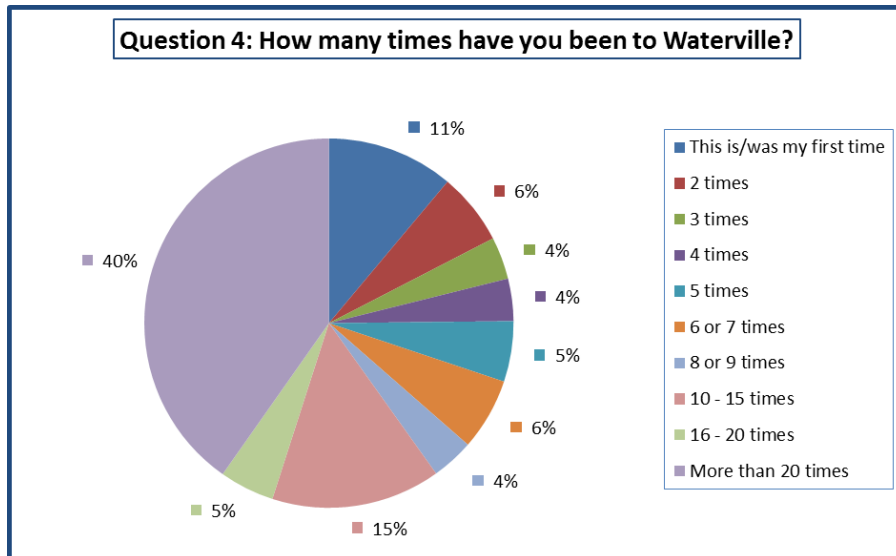
The survey questionnaire was then circulated on Inland Fisheries Ireland's website and social media pages and also posted on the Waterville Lakes and River's Trust website; the survey description requested that willing anglers who had visited and fished in Waterville in the previous year should take part. When a sufficient quantity of surveys had been completed the interpretation and analysis of data was undertaken by Inland Fisheries Ireland, NUI Galway and the Economic and Social Research Institute and, finally, the findings and conclusions were written up.

### 3. Survey Analysis

Respondents were firstly asked for their key motivation for visiting Waterville as an angling destination; the most popular reason given for visiting Waterville (by 53% of respondents) was that they have been travelling to Waterville for many years and return because they enjoy it (Figure 1). The next most popular reason (14%) is through angling articles both online and in traditional formats; this is an effective form of marketing and promotion so there is scope to significantly increase the awareness of the Waterville fisheries using these methods. Friend and family recommendations was the next most popular answer (9%) with a further 9% responding that living nearby' was a key factor behind their visits.

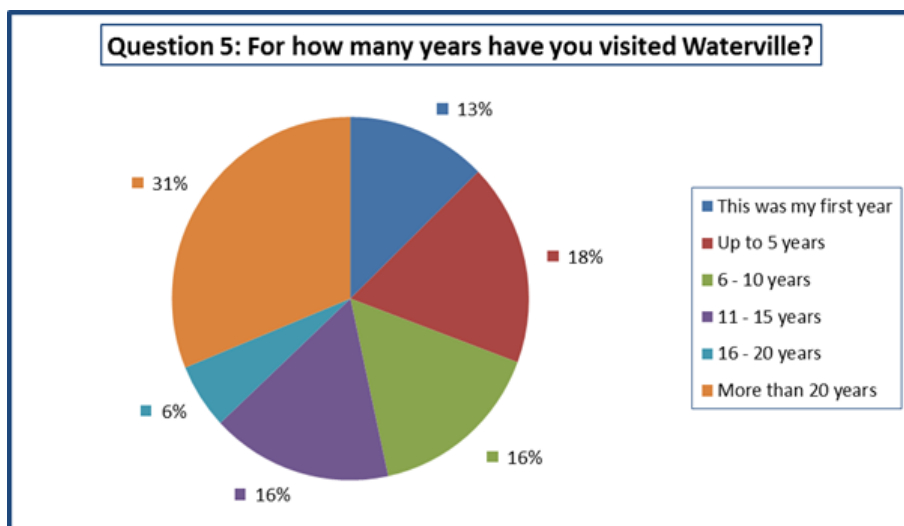


**Figure 1: Q1 - What do you think MOST influenced your decision to choose Waterville as a destination**



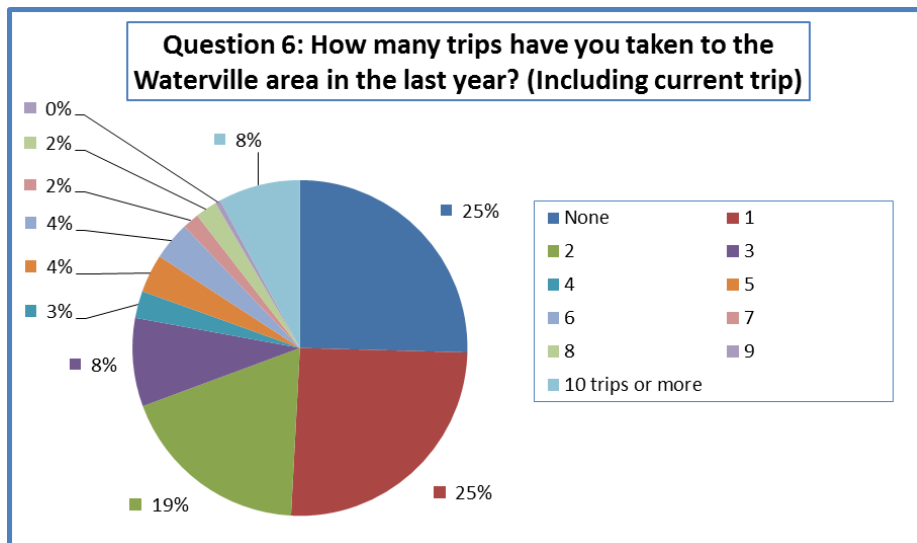
**Figure 2: Q4 – How many times have you been to Waterville**

Questions 4 and 5 highlight the loyalty that is traditionally shown by visiting anglers to an angling location. Over 40% of the anglers surveyed had visited the Waterville area more than 20 times with 60% having visited 10 times or more – an extremely high return rate in tourism terms. Not all of the anglers who visit are long term visitors with 11% having only visited for the first time with a total of 21% having visited 3 times or less; this would indicate that there is also a healthy recruitment of new visitors to the area each year.



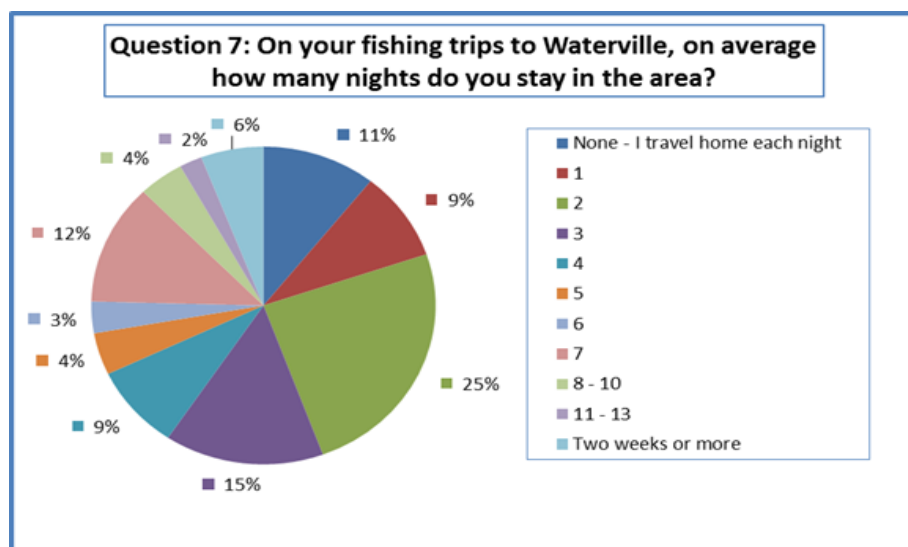
**Figure 3: Q5 – For how many years have you visited Waterville**

Nearly one third of survey respondents (31%) have been visiting Waterville for more than 20 years with 53% having visited for more than 10 years, this is a recurring theme in Irish angling tourism where anglers build up a relationship with an angling destination and return for many years. Again, for some 13% of the respondents this was their first year to visit the area suggesting that there is also healthy recruitment of new visitors.



**Figure 4: Q6 – How many trips have you taken to the Waterville area in the last year**

Despite the fact that the survey introduction requested that only anglers who had been to fish in the Waterville area in the previous year should take the survey some 25% of the respondents hadn't visited in the last year (Figure 4). Another 25% had visited once in the last year with 19% having visited twice and 21% having visited between 3 and 8 times in the year. The 8% of the sample who had visited more than 10 times corresponds with those anglers who live locally to the area and took the survey. What is important to note from this question is that over 40% of the anglers make multiple trips to the Waterville area to fish each year.



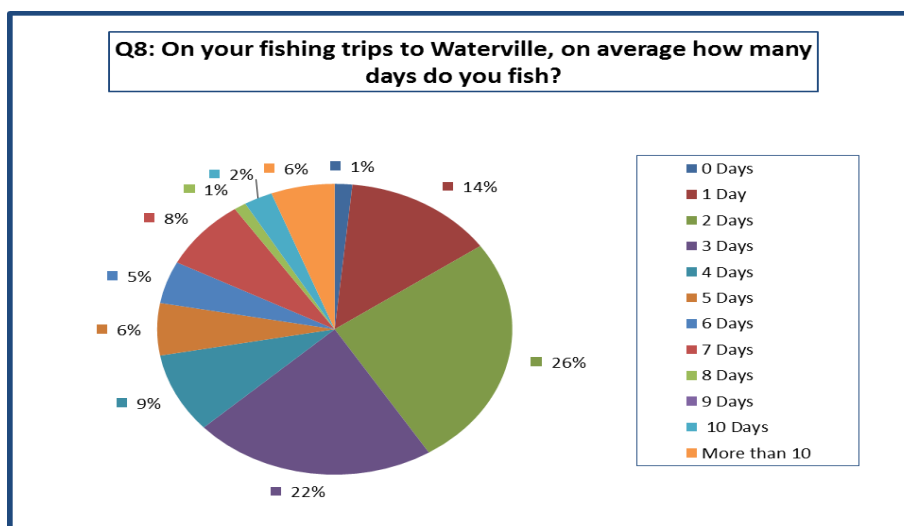
**Figure 5: Q7 – On your fishing trips to Waterville, on average how many nights do you stay in the area?**

The most popular length of stay for visiting anglers is two nights (25%) with a further 24% staying for two or three nights. Interestingly a further 24% stay for longer than a week, with 6%

preferring to stay for two weeks or longer indicating that Waterville may be the preferred destination for an extended summer holiday. Some 11% of the sample travel home each night – a reflection of the 9% of survey respondents who live within a short driving distance; a further 9% prefer to stay for a single night. Further analysis of visiting anglers shows that GB anglers stay in Waterville for an average of 8.2 nights during their trips and Irish anglers stay for an average of 3.2 nights. By comparing this with Central Statistics Office figures for average length of stay in Ireland (Table 1) it is clear that anglers are willing to stay in an area for longer than non-angling visitors.

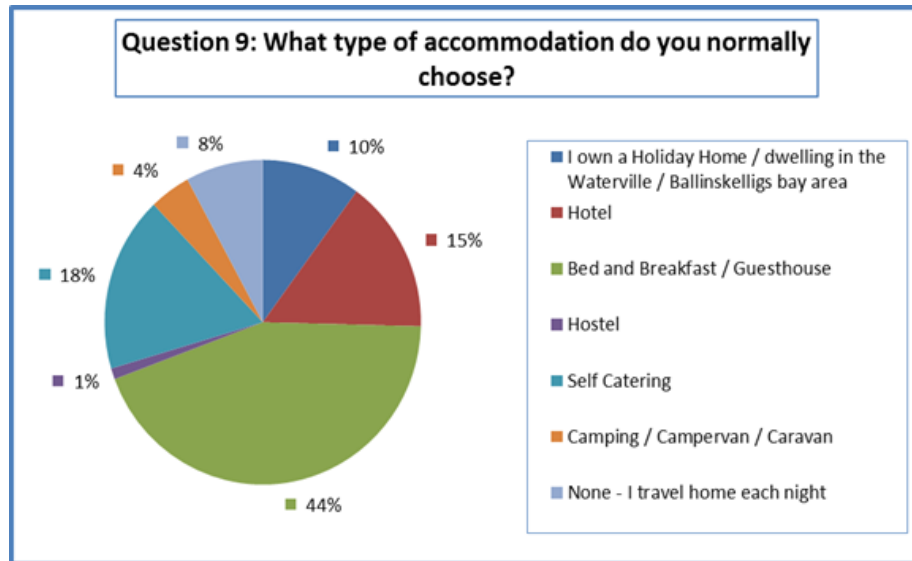
**Table 1: Overseas trips to Ireland by non-residents - average length of stay**

Year	2011	2012	2013
			<i>Nights</i>
<b>Average length of stay in Ireland</b>	<b>7.7</b>	<b>7.4</b>	<b>7.3</b>
Great Britain	4.8	4.6	4.7
France	10.3	9.2	8.9
Germany	9.3	9.0	9.6
Italy	9.5	9.5	9.0
Other Europe	10.2	9.1	8.8
USA & Canada	8.8	8.5	8.2
Australia & New Zealand	11.7	11.6	11.8
All other areas	15.4	13.9	14.1
<i>Source: CSO 2014</i>			



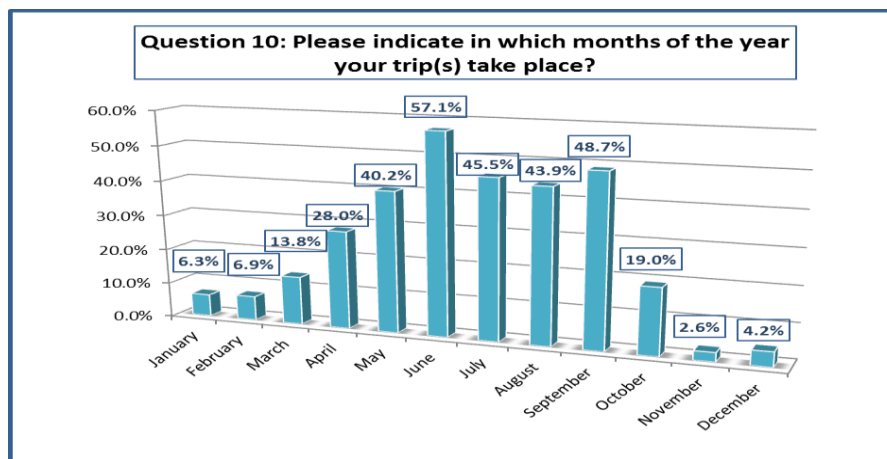
**Figure 6: Q8 – On your fishing trips to Waterville, on average how many days do you fish?**

Question 8 is linked to Question 7 in that the most common numbers for days fished fit with the number of nights stayed in the area; two days fished is the most common response (26%) followed closely by three days (22%). More than a quarter of the sample (28%) indicated that they like to fish for five days or more on their trips to Waterville. Following further analysis, GB anglers fish for an average of 7 days during their stays with Irish/Ni anglers fishing for 2.9 days.



**Figure 7: Q9 – What type of accommodation do you normally choose?**

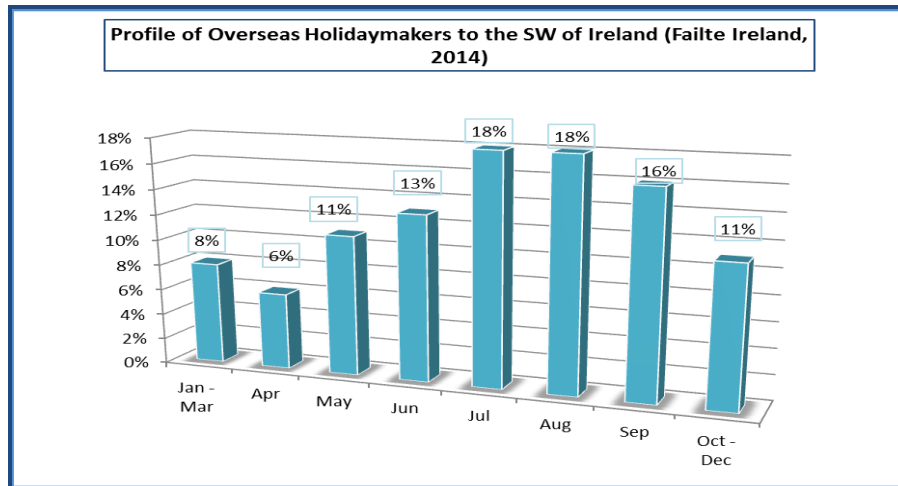
Nearly half of respondents preferred to stay in Bed and Breakfast accommodation with 18% choosing Self Catering and 15% opting to stay in Hotels. A relatively high proportion of respondents have invested in holiday homes in the area (10%) and, once again, the 9% of people who live nearby is reflected in the 8% who opt to travel home each night.



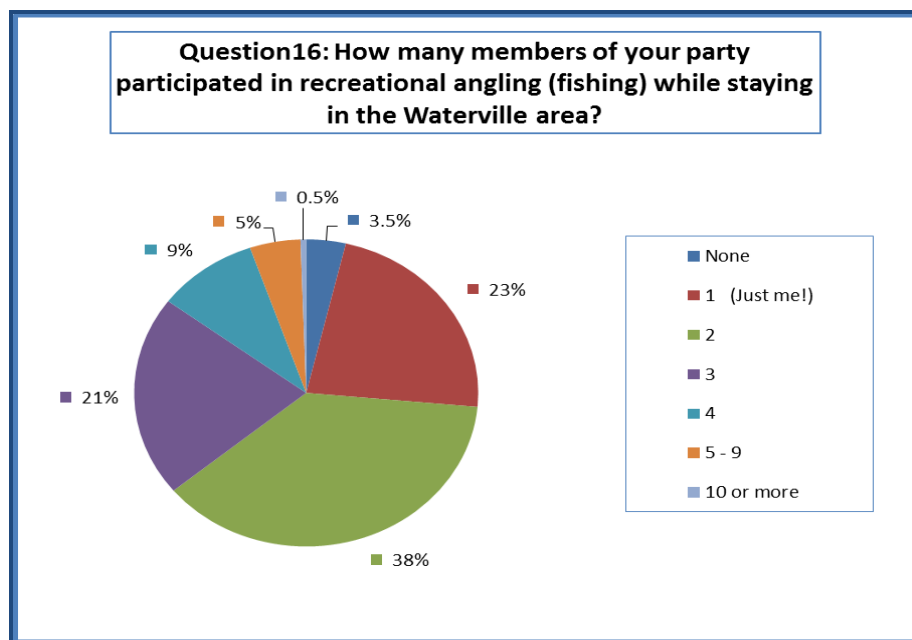
**Figure 8: Q10 – Please indicate which months of the year your trip(s) take place?**

Question 10 in the survey asked respondents to name the months that they like to come to Waterville to fish. The responses for this question and a comparison with overseas holidaymaker statistics in Figure 9 (below) help to highlight the importance of angling in tourism terms. The most popular months for Irish tourism are traditionally July and August; these summer months coincide with school holidays and are on average the warmest months of the year in Ireland. In terms of angling, July and August can be two of the quieter months of the season. As can be seen

in Figure 8, the most popular months for angling visitors are June (57%) and September (49%). July and August are still important months and are the third and fourth most popular months with 45% and 44% respectively; however, May is nearly as popular with 40% of visits taking place then. Furthermore, the months of April, May and October can still attract angling tourism and these 'shoulder' tourism periods have the ability to extend the traditional tourist season and provide a significant boost to tourism service providers outside of the key non-angling tourism periods.

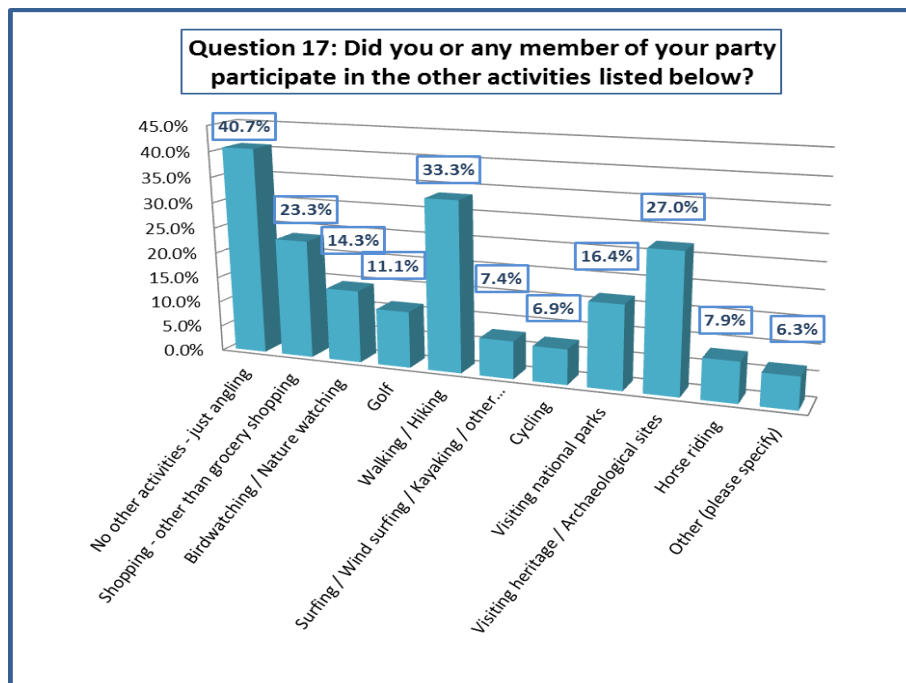


**Figure 9: Profile of Overseas Holidaymakers to the SW of Ireland (Fáilte Ireland, 2014).**



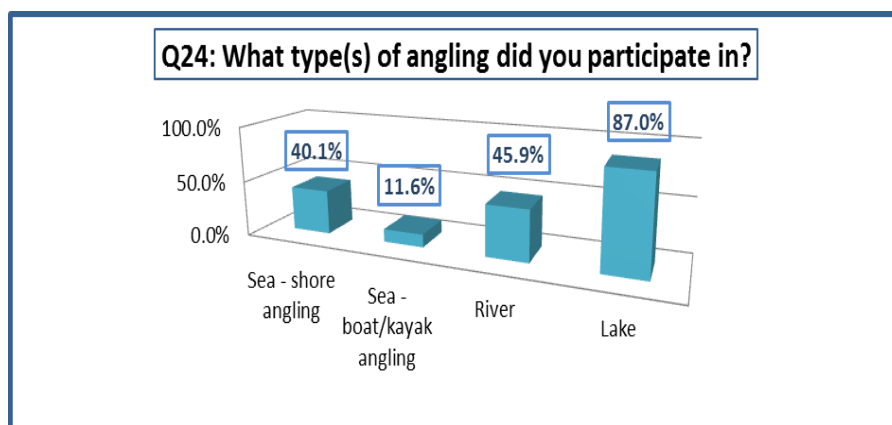
**Figure 10: Q16 – How many members of your party participated in recreational angling (fishing) while staying in the Waterville area?**

As can be expected, the majority of anglers travelled to Waterville with friends or family with over two thirds (68%) reporting that their party contained between two and four anglers who fished during the stay. Some 23% reported that they were the only member of their travelling party who fished; these individuals may have been in the area for a family holiday.



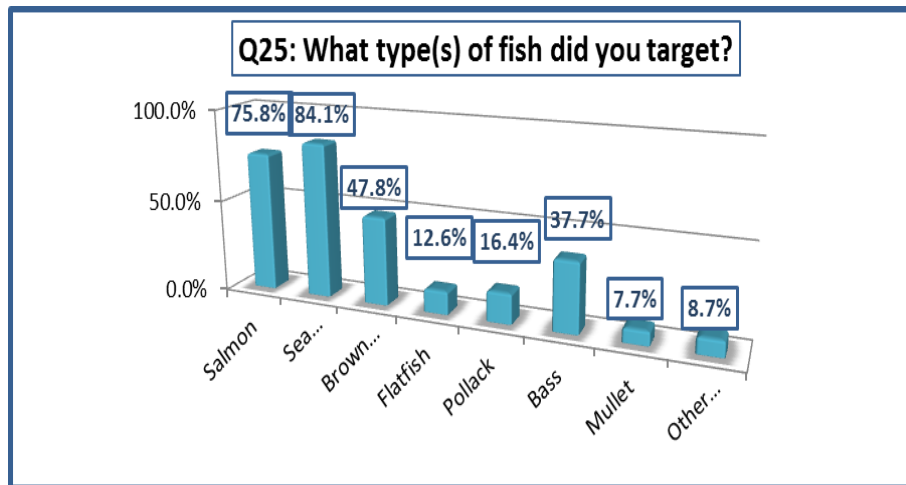
**Figure 11: Q17 – Did you or any members of your party participate in any of the activities listed below.**

Some 40% of the members of the visiting anglers' parties took no part in alternative activities (Figure 11) with angling being the sole focus of their visit; this is very often the case in angling tourism – the anglers are only interested in fishing during their stays. Walking/hiking (33.3%) and visiting heritage & archaeological sites (27%) were the two most popular non-angling activities for party members. One noticeable factor here is the low number of visitors whose group members also played golf (11.1%) which is one of the other key attractions to the Waterville area.



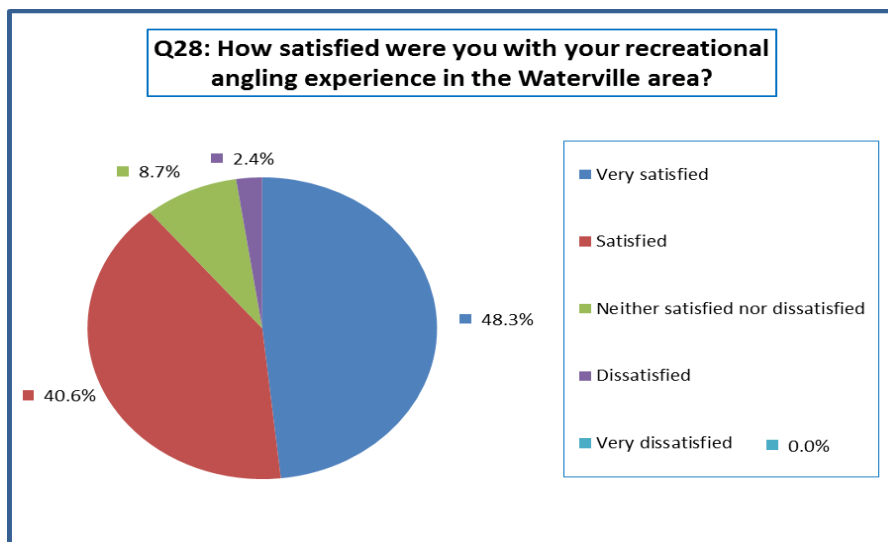
**Figure 12: What type(s) of angling did you participate in?**

Lake fishing is the most popular type of angling for survey respondents with 87% of them having fished one the Currane lough system; 46% having fished the rivers and 40% having participated in shore angling.



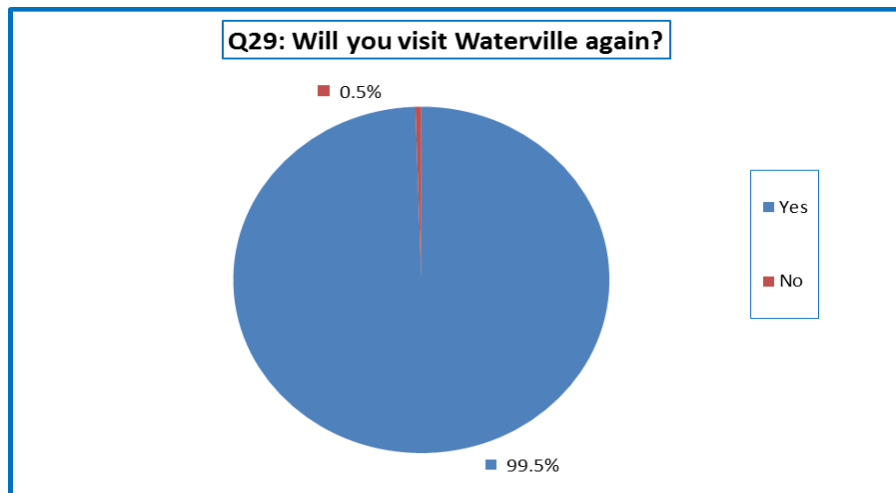
**Figure 13: What type(s) of fish did you target?**

Waterville is famous for its sea trout fishery and 84% of the survey respondents targeted sea trout (Figure 13). Salmon were targeted by 76% of anglers and brown trout by 48% of anglers. Bass were by far the most popular sea species with 38% of anglers having fished for them. GB anglers recorded even higher figures for sea trout (94%), salmon (92%) and bass (47%) indicating that these species are the most important to the GB market.



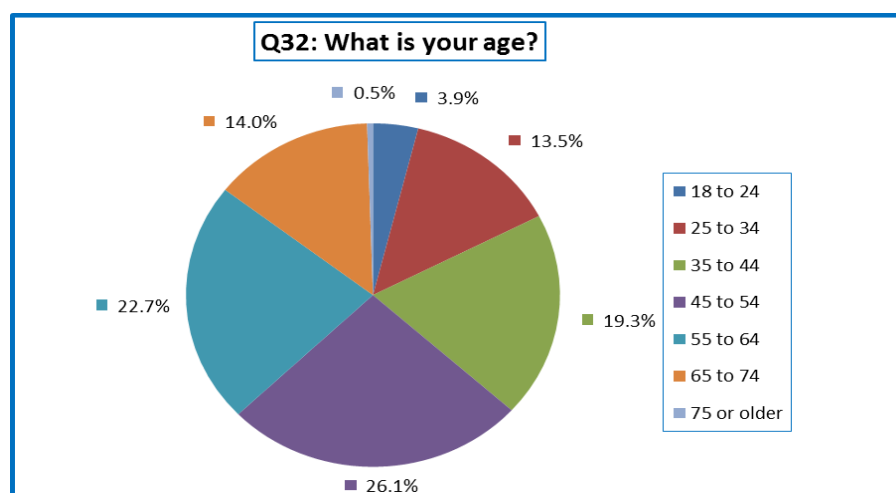
**Figure 14: Q28 - How satisfied were you with your recreational angling experience in the Waterville area?**

Figure 14 shows that only a very small percentage of anglers were dissatisfied with their angling experience in Waterville with 48% being very satisfied and 41% being satisfied. Roughly 9% of anglers were neutral with 2.4% feeling dissatisfied.



**Figure 15: Q29 – Will you visit Waterville again?**

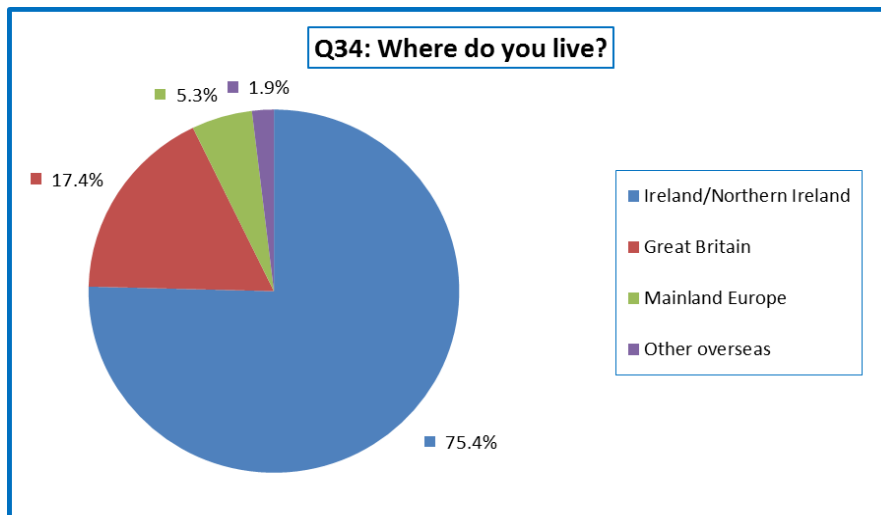
Following on from Q28, in Q29 some 99.5% of respondents indicated that they wish to return to Waterville again in the future (Figure 15). This figure once again highlights the loyalty that visiting anglers have towards their favoured angling destinations.



**Figure 16: Q32 – What is your age?**

The average age of the anglers surveyed is reflective of the typical demographics for anglers in Ireland with the largest segment (26%) being that of the 45-54 age bracket. While a significant proportion of the respondents were of an older demographic (37% aged 55+) there is a good enough spread of age categories to suggest that recruitment of new visitors is taking place (with 17.5% aged 18-34 and 19% aged 35-44).

Traditionally angling is a male dominated activity and the anglers of Waterville are no different with 97.6% being male as reported in Q31 (not included in report).



**Figure 17: Q34 – Where do you live?**

As discussed earlier in this report, of the 207 anglers surveyed approximately 75.5% came from the island of Ireland, 17.5% from Great Britain (GB), 5% from mainland Europe and 2% from other overseas areas.

#### **4. Spending by tourist anglers in the Waterville area**

The Waterville angler dataset contained responses from 207 anglers fishing in the Waterville area. For the analysis of economic impact we focus on tourist anglers visiting the Waterville area, which we identify as those that do not travel home each night. The focus is on tourist anglers because their spending is a boost to the local economy whereas spending by anglers resident in the community would occur regardless of the fishery. This analysis distinguishes between angling (e.g. Ghillies, boats, etc.) and non-angling expenditure (e.g. food, accommodation, etc.). The analysis also categorises expenditure both by country of origin and also by accommodation type to help identify which types anglers are the highest spenders. Cost of travel to the Waterville area is not included (e.g. car hire, air/ferry fares, petrol/diesel etc.) as these types of expenditures do not contribute to the local economy.

Non-angling related expenditure includes: 'Accommodation', 'Food and drink consumed in cafes/pubs/restaurants', 'Groceries (food and drink purchased and consumed elsewhere)', 'Gifts & souvenirs', and 'Other non-angling related expenditures'. Angling expenditures used in the analysis include: 'Angling guide or Ghillie', 'Boat hire/Engine hire/Fuel & oil', 'Purchase of Rods/Reels', 'Purchase of Line/hooks/flyes/lures, etc.', 'Natural Bait (worms, squid, frozen fish, etc.)', and 'Purchase of other Angling Related items'.

Six tables of expenditures are reported: Tables 2-7. The first set of tables (Tables 2-4) includes expenditures on a per trip basis but note that trips vary in length. The second set of tables includes expenditures on a per angler, per day basis and are potentially more practically useful. The tables report expenditure by country of origin and accommodation type. For example, in Table 2, anglers from Great Britain spend an average of €1,082 per trip. But British anglers staying in hostel accommodation spent €131 per trip, whereas those staying in guesthouses spent €1,156 per trip.

The data in the table is from 168 anglers (being the number of anglers that reported all the data needed to calculate these tables). The percentages in the table are the number of respondents within that category as a proportion of the total. For example, Irish anglers staying in B&Bs spend on average €496 per trip and this figure is based on 38% of the sample (or 64 respondents = 38% times 168 anglers).

The higher the percentage figure, the more reliable the expenditure estimate. For example, the figures for expenditure by anglers staying in hostels in Table 2 (€119 for an Irish angler, and €131 for a GB angler) are each based on one angler response and therefore the figures are not very reliable as estimates of expenditure by anglers staying in hostels.

**Table 2:** Total Expenditure, per angler, per trip

	Ireland/ N.Ireland	Great Britain	Mainland Europe	Other	Total
B&B/Guesthouse	€ 496	€ 1,156	€ 1,301	€ 478	€ 643
	38%	6%	4%	1%	49%
Camping/Caravan	€ 277				€ 277
	3%				3%
Hostel	€ 119	€ 131			€ 125
	1%	1%			1%
Hotel	€ 320	€ 1,472	€ 1,905		€ 763
	10%	5%	1%		16%
Holiday Home	€ 234	€ 1,218	€ 310	€ 4,825	€ 876
	5%	4%	1%	1%	11%
Self-Catering	€ 489	€ 609	€ 146		€ 511
	14%	5%	1%		20%
Total	€ 437	€ 1,082	€ 1,147	€ 1,927	€ 644
	71%	21%	6%	2%	100%

**Table 3: Non-Angling Expenditure, per angler, per trip**

	Ireland/ N.Ireland	Great Britain	Mainland Europe	Other	Total
B&B/Guesthouse	€ 313	€ 876	€ 988	€ 191	€ 435
	38%	6%	4%	1%	49%
Camping/Caravan	€ 184				€ 184
	3%				3%
Hostel	€ 19	€ 131			€ 75
	1%	1%			1%
Hotel	€ 213	€ 1,117	€ 1,375		€ 557
	10%	5%	1%		16%
Holiday Home	€ 123	€ 878	€ 100	€ 4,225	€ 643
	5%	4%	1%	1%	11%
Self-Catering	€ 344	€ 445	€ 122		€ 365
	14%	5%	1%		20%
Total	€ 282	€ 808	€ 852	€ 1,535	€ 451
	71%	21%	6%	2%	100%

**Table 4: Angling Expenditure, per angler, per trip**

	Ireland/ N.Ireland	Great Britain	Mainland Europe	Other	Total
B&B/Guesthouse	€ 183	€ 280	€ 313	€ 288	€ 208
	38%	6%	4%	1%	49%
Camping/Caravan	€ 93				€ 93
	3%				3%
Hostel	€ 100	€ 0			€ 50
	1%	1%			1%
Hotel	€ 108	€ 354	€ 530		€ 206
	10%	5%	1%		16%
Holiday Home	€ 111	€ 340	€ 210	€ 600	€ 233
	5%	4%	1%	1%	11%
Self-Catering	€ 145	€ 164	€ 24		€ 146
	14%	5%	1%		20%
Total	€ 155	€ 273	€ 295	€ 392	€ 193
	71%	21%	6%	2%	100%

Looking at Tables 5-7 we can compare expenditure on a per angler, per day basis. Start with the bottom row of Table 7. Irish and European anglers roughly spend the same per day on angling (e.g. guides, bait, etc.) and averaging between €31-38. (Note that the minimum and maximum spend are much lower and higher – the figures in the table are averages). Non-European anglers spend quite a bit more, on average €55 per day.

**Table 5: Total Expenditure, per angler, per day**

	Ireland/ N. Ireland	Great Britain	Mainland Europe	Other	Total
B&B/Guesthouse	€ 121	€ 151	€ 155	€ 111	€ 127
	38%	6%	4%	1%	49%
Camping/Caravan	€ 56				€ 56
	3%				3%
Hostel	€ 40	€ 44			€ 42
	1%	1%			1%
Hotel	€ 95	€ 245	€ 147		€ 147
	10%	5%	1%		16%
Holiday Home	€ 47	€ 86	€ 39	€ 322	€ 77
	5%	4%	1%	1%	11%
Self-Catering	€ 94	€ 72	€ 21		€ 86
	14%	5%	1%		20%
Total	€ 103	€ 139	€ 129	€ 182	€ 114
	71%	21%	6%	2%	100%

**Table 6: Non-Angling Expenditure, per angler, per day**

	Ireland/ N.Ireland	Great Britain	Mainland Europe	Other	Total
B&B/Guesthouse	€ 76	€ 118	€ 121	€ 49	€ 84
	38%	6%	4%	1%	49%
Camping/Caravan	€ 32				€ 32
	3%				3%
Hostel	€ 6	€ 44			€ 25
	1%	1%			1%
Hotel	€ 63	€ 189	€ 106		€ 107
	10%	5%	1%		16%
Holiday Home	€ 24	€ 60	€ 13	€ 282	€ 52
	5%	4%	1%	1%	11%
Self-Catering	€ 62	€ 55	€ 17		€ 58
	14%	5%	1%		20%
Total	€ 65	€ 107	€ 98	€ 127	€ 77
	71%	21%	6%	2%	100%

**Table 7: Angling Expenditure, per angler, per day**

	Ireland/ N.Ireland	Great Britain	Mainland Europe	Other	Total
B&B/Guesthouse	€ 45	€ 33	€ 34	€ 62	€ 43
	38%	6%	4%	1%	49%
Camping/Caravan	€ 24				€ 24
	3%				3%
Hostel	€ 33	€ 0			€ 17
	1%	1%			1%
Hotel	€ 32	€ 56	€ 41		€ 40
	10%	5%	1%		16%
Holiday Home	€ 23	€ 26	€ 26	€ 40	€ 25
	5%	4%	1%	1%	11%
Self-Catering	€ 32	€ 17	€ 3		€ 27
	14%	5%	1%		20%
Total	€ 38	€ 32	€ 31	€ 55	€ 37
	71%	21%	6%	2%	100%

These tables are of real interest when they are compared with statistics taken from Fáilte Ireland's Tourism Facts reports for the years 2014 and 2015; these can be seen in Tables 8 & 9 below. The expenditures of anglers visiting Waterville far exceed those reported by non-angling visitors and holidaymakers. Non-angling visitors and holidaymakers reported spending €64 and €83 per person per day respectively in 2014 and €68 and €89 per person per day respectively in 2015. Overseas angling visitors from GB reported spending €139 per person per day and visitors from mainland Europe reported expenditures of €129 per person per day. While the sample sizes for GB and other overseas anglers are small in this survey, it does provide a good indication that angling visitors are likely to spend more than non-angling visitors and this is consistent with other studies into Irish angling tourism which have been undertaken by Inland Fisheries Ireland and others.

**Table 8:** Fáilte Ireland, spend per person per day - Tourism Facts 2014

Revenue – some useful figures <i>Per diems – spend per person per day</i>	
Overseas visitors	€64
Overseas holidaymakers	€83
Domestic overnight trips	€69
Domestic day trips <sup>14</sup>	€40

**Table 9:** Fáilte Ireland, spend per person per day - Tourism Facts 2015

Revenue – some useful figures <i>Per diems – spend per person per day</i>	
Overseas visitors	€68
Overseas holidaymakers	€89
Domestic overnight trips	€73

Furthermore, Irish and NI angling visitors reported per person per day expenditure figures of €103 on average; this once again exceeds the figures of €69 for 2014 and €73 for 2015 as reported by Fáilte Ireland. It is unclear whether or not the figures used by Fáilte Ireland include cost of travel such as air/ferry fares and fuel; if these expenditure categories are included then the difference in expenditure figures between angling and non-angling visitors is even more significant.

When total expenditure per person per trip is compared with figures from the Tourism Development International (TDI) *Socioeconomic Study of Recreational Angling in Ireland*, which was published in 2013, it can be seen that the trip expenditures of anglers visiting Waterville is higher than those reported in the TDI study (Table 10). The average per trip expenditures across all categories of anglers was reported as €523 in the TDI study but Waterville anglers reported a higher per trip spend with €644. In more detail, Irish and NI anglers reported trip expenditures of €178 and €367 respectively in the TDI study while joint Irish & NI respondents to the Waterville survey reported per trip expenditures of €437. Similarly, GB anglers reported trip expenditures of €918 in the TDI study compared with €1,082 in the Waterville survey. European anglers reported a slightly lower per trip expenditure figure in the Waterville survey (€1,147) compared with the TDI study ((€1,177) but apart from this all other reported expenditure figures for overseas markets were higher.

**Table 10:** Expenditure Incurred on this Trip - Average per Person Expenditure x Market (TDI, 2013)

	All Anglers	ROI Anglers	NI Anglers	Britain	Europe	Other*	Overseas (Average)
<b>Average Expenditure on this trip*</b>	€628	€196	€440	€1,285	€1,766	€1,960	€1,438
<b>Number of Individuals Expenditure Relates to</b>	1.2	1.1	1.2	1.4	1.5	1.3	1.4
<b>Average Per Person Exp.</b>	<b>€523</b>	<b>€178</b>	<b>€367</b>	<b>€918</b>	<b>€1,177</b>	<b>€1,508</b>	<b>€1,027</b>

More detailed analysis of expenditure patterns from anglers visiting the area revealed that the highest expenditures are from anglers who are long time repeat visitors who opt for hotel/B&B type accommodation arrangements rather than a privately owned holiday home or a camping/self-catering type accommodation arrangement. Game anglers generally had higher levels of expenditure compared to sea anglers and the expenditure of solely freshwater game anglers was higher than anglers making up the rest of the sample. Specialist angler's expenditures were found to be not substantially different than tourists that engage in angling as one of several activities they undertake in the area. Obviously, in terms of local economic impact the recipients of that spending will vary depending on whether they provide angling or other tourist services. There was also no evidence that high income anglers spend significantly more than others.

## 5. Consumer Surplus

The Waterville fishery provides angling and other recreation amenities to the public at a nominal cost. However, the use-value which this site provides is not completely captured by market transactions. Benefits which must be consumed *in situ* make the Travel Cost Method (TCM) the most appropriate choice of revealed preference technique for estimating their value. The basic premise of the travel cost method is that the time and travel cost expenses that people incur to visit a site represent the “price” of access to the site. Thus, peoples’ willingness to pay to visit the site can be estimated based on the number of trips that they make at different travel costs. This is analogous to estimating peoples’ willingness to pay for a marketed good based on the quantity demanded at different prices.

A negative binomial economic model with a correction for endogenous stratification was used to estimate anglers’ consumer surplus for the Waterville fishery and a resulting estimate of per trip consumer surplus (CS) was €300. This €300 represents the average amount that visiting anglers would be willing to pay *above* what they actually pay during the course of their trips to Waterville.

In theory, a visiting Irish angler who pays €437 for his trip to fish in Waterville would be willing to pay up to €737 for the trip. The difference between this €737 *willingness to pay* figure and the €437 actual pay figure is the value that is retained by the angler of €300; this is also known as the *consumer surplus*. It should be noted that this does not mean that every visiting angler would be willing to pay an extra €300 on every trip to Waterville; some may only have a CS of €20 while others might have one of €1,500. The CS is a purely theoretical figure reflecting how highly the anglers’ value angling in Waterville.

## 6. Conclusions & Recommendations

The angling opportunities available on the lough Currane system, the river Inny, in Ballinskelligs bay and further offshore are world class. Lough Currane alone is a national treasure in angling terms and there are few other lake fisheries in Europe capable of producing sea trout of the size and quantity that return to lough Currane each year. This stock of sea trout is of significant heritage value to Ireland and should be protected as such.

This angler survey has helped to reinforce the findings from previous studies which suggest that anglers will spend more money, stay for longer and return far more frequently than other visitors. The bond that forms between the angler and their favourite fisheries (including the wider area) can be a very strong one which can draw the angler back for many years. Having said that, there are more and more opportunities available to anglers today than ever before; the cost of travel has never been lower and the variety of travel destinations has never been greater. Furthermore, the early 21<sup>st</sup> century has been termed the information age and it has never been easier to research the angling opportunities available in other parts of the world.

Service providers should work proactively to keep ahead of the game. On other fisheries (particularly where catch and release is practiced widely) information is shared readily with visiting anglers; this ensures that the anglers have the best chance of catching fish and leaves them with the feeling that, even if they have no luck on the day, they were given the opportunity to do well.

By providing highly detailed, fishery specific information to anglers you not only increase their chances of catching fish but you also increase the level of trust and build a relationship with them. As this survey has shown, building relationships with anglers is necessary to ensure that the visiting anglers want to return for years to come.

A list of suggested actions for the Waterville Lakes and Rivers Trust and the people of Waterville to take are set out below.

### Protect the Fishery

- Prevent illegal fishing (IFI Hotline 1890 347424)
- Monitor water quality
- Maintain spawning beds / habitat for juvenile sea trout & salmon (see Channels & Challenges, Martin O'Grady, 2006)
- Monitor offshore factors which affect salmon and sea trout at sea; collect data to reflect changes in abundance etc.
- Promote Catch and Release for all species
- Provide Biosecurity facilities at access points

## Promote the Fishery

- There is considerable scope to market Waterville as a 'multi discipline' angling destination. Waterville is known for the quality of its sea trout/salmon fishing and also for its bass fishing. These two angling disciplines have historically been carried on in relative isolation, with little cross over (i.e. 'Game' anglers fished the lake & 'Sea' anglers fished the bay. These days, younger anglers in particular are more open to the idea of cross disciplinary fishing and the methods used (lure & fly fishing) are cross compatible.
- Upgrade and maintain the website [www.watervillelakes.org](http://www.watervillelakes.org) (see Donegalanglingholidays.com)
- Increase journalist visits & online reports: The 14% of visitors that attributed their decision to visit Waterville to magazine articles & online media is significant as it represents the most obvious way to bring new anglers into the area. The survey shows that Waterville has a good capacity to get repeat visits from anglers once they have visited the area and so a good strategy would be to try to increase the footfall of new anglers to the area through regular activity in traditional/social media which can include facilitating visits from overseas angling journalists.
- Waterville Lakes & Rivers Trust to attend trade shows abroad & at home (Galway Fly Fair, Angling Show NSC Swords, UK, Netherlands, France etc.)
- There is a lack of up to date angling information for the area, both in print and digital format. While many anglers will use guides & ghillies, many more anglers will not do so. It is important to ensure that these anglers are afforded the best opportunity to catch fish and detailed angling information & maps showing e.g. drifts & fish holding areas (lake) or angling marks (sea) would help to achieve this (see e.g. Lough Sheelin guide for reference). While there may be resistance to such sharing of information, it is likely that more people catching more fish will lead to better overall publicity for the area and lead to increased numbers of anglers visiting.
- It is important to keep abreast of angling trends when marketing the fishery and to keep in tune with those trends. For example, younger anglers & European anglers are highly attuned to the concept of catch and release and so using photos of fish being released will likely have more impact than fish with tags in them.

## Provide for the Anglers

- Ensure that angling equipment and facilities meet the required safety and quality standards (e.g. boat & engine hire, tackle hire, lifejackets etc.)
- Ensure that accommodation providers have adequate facilities for anglers
- Provide up to date information (not just reports but detailed information on how to fish, where to fish, what to use etc. – as mentioned above)
- Angling guides/ghillies should be active when the conditions suit the fishing (early mornings/late evenings/dictated by tides or weather conditions etc.)



- It is important to manage expectations when marketing the fishery and to ensure that anglers understand the quality of fishing they can expect. While the traditional marketing has tended to focus on the trophy fish (big sea trout), the reality is that most anglers visiting the fishery will not capture a trophy fish. However, those anglers will likely be quite happy to have fished and caught a few smaller sea trout in the wild and wonderful surroundings of Waterville. Also, if fishing is poor for a period for some reason, it is better to be upfront and proactive about this in advance. Seeking an alternative solution e.g. a day bass fishing or trying a different venue (even outside Waterville) will likely keep anglers encouraged that you are working with them and will build trust.

## 7. Angler Comments

In the final section of the survey anglers were asked to comment on any issues that they thought relevant or areas that they thought the survey questions did not cover adequately. The comments have been left as written by the anglers with the exception of those that might appear offensive to the reader. Keywords have been highlighted for ease of interpretation.

Waterville a **magical place** if I won d lotto I would buy a house there, Keep up d good work with d development a credit to those involved.

**If possible develop a family friendly shore angling platform for kids to learn how to cast.**

I did not catch any fish but thought the setting was amazing. I will be back for more fishing - probably with friends for a week. **It's important that stocks continue to be protected.**

We must **protect our natural resource**. So much time and effort has gone into saving the salmon / sea trout and this must continue.

**Better policing of the fishery.** Improvement of **spawning grounds**.

The **ghillies need to flex their hours** to match the best fishing times and the atmosphere in the lobster bar has been lost

Keep on top of **poaching**! Dingle has been destroyed regarding bass, don't let it happen in Waterville.

**Stop farmers polluting your rivers.**

Close the mink farm - and **make it easier to buy day permits** or part day permits on other local rivers

Everyone involved in **angling tourism in Waterville is very open and helpful to the visiting angler.**

**Costs of boat hire** on the upper lakes are a bit on the high side.

Please comply with the **European water framework directive**

Take the **nets off the river Inny**

**Improve awareness and conservation of Bass angling**

**Great place, Waterville.** Nearly as good as Donegal. Nearly.

No comment

Yes, this is really **too much expensive to go fishing the Comeragh river**. This is perfect price on Inny right bank...

**Close or renovate the Bayview Hotel.**

**Preservation of your sea trout stock** is paramount

With two golf courses, lake, river and sea fishing and beautiful beaches in the vicinity, **Waterville has fantastic potential**, particularly with the extra traffic created by the Wild Atlantic Way.

just a thought guys **more road upkeep** that's all really,,, it is really the kingdom of Ireland love it,,, none

The Ghillie was very nice (Neil )

;) )

More needs to be done to **prevent the illegal taking** of both sea and migratory fish in the area.

Help protect the fishery by **banning fish farms**



don't change anything, Every holiday here has been memorable for both sea and salmon and sea trout fishing

Get rid of Mink and salmon farms.

It is imperative that any proposed salmon farming be done in a closed environment with strict limitations as to the quantity of production as otherwise one of our most treasured natural resources wild salmon and sea trout along with the extremely important tourism business it engenders will be destroyed and the damage will be irreversible...some legacy for the current government.

Waterville has many angling opportunities that are not sufficiently promoted in the UK. It does need a decent luxury hotel (which the Butlers Arms is not).

keep the pressure up to discourage salmon farming in the area or the fishery may die

last trip was Sept., 2014 so answers may not be totally accurate

love the place , sea eagles , mountains , innys , lake , beaches , people , the lot

no fish farms

market village/area and attractions more effectively and organize key facility owners/managers to work together.

I have been now for 32yrs, and the fishing has never been easy, even in the early days. But we have not done as well as we used to since the fish farm was put nearby. This year was a complete blank week all round, apart from smalls, but conditions were far from ideal with the water being quite low. We are going to write a book "A million and one excuses on Lough Currane". We add several each year, mostly donated by local Ghillies, and never ceased to be amazed by their dexterity in avoiding the question put to them concerning the current fishing situation. The general consensus of opinion is that "It's f \_ \_ \_ d". But of course, being eternal optimists we hope to be back for another craic in late June.

protect the sea trout and salmon and keep up the good work by the Waterville Fisheries Group

improve enforcement in relation to Salmon/Bass poaching

Fantastic place to fish and most of all very friendly and helpful people.

Waterville is a great area to visit and fish.

Love the place. Only complaint is its too far for a day trip...I will have to move there!

I suggest that Lough Currane becomes fly fishing only.

Introduce a maximum bag limit of one bass per day. A total catch and release policy for all salmon and sea trout for one season. Culling of seals.

Better packed lunches by hotels

BE BETTER WITH WEEKLY,FIVE DAY.WEEKEND OR MIGRATORY LICENCES

Lack of good tackle shop and related items

Ban fish farms from Irish estuaries to maintain the natural and wild stock of sea trout and salmon! Otherwise we will lose our wild fish (mix with escapees) and finally our salmon and sea trout for good. In comparison to a few people making big money and employing very few people.

More boatmen

Keep the Hatchery Open

I don't see Why you're asking people about their personal income.

I've been visiting since 1977, often several short trips a year. If there is good worthwhile sea trout fishing we come. If sea trout stocks are poor then we do not come but go elsewhere to fish.

No

The town sewage system needs sorting the smell at times in the main part of the town is awful. If my understanding is correct this means that raw sewage must be getting pumped into the bay ( this observation relates to 2014 so may have been fixed but hard to tell at this time of year)

The fisheries Sea and Game are sadly in progressive decline. Without the excellent work the Waterville Lakes and Rivers Trust undertakes, with minimal resources, I would be seriously considering pulling out of Waterville and Ireland.

It is encouraging to see local people involved in beach cleans

Introduce a cheap daily salmon/sea trout licence as in UK. The ridiculous cost of licences puts off more anglers from fishing on their holidays meaning less income for ghillies and less tourism.

Too much trolling of the lake. I know why it is done, as pressure on Ghilles to catch, but I believe it pushes fish down

I love every about Waterville the people how friendly everyone is and the boats are always in tip top shape and always petrol big mike is doing a great job. Long may it last

Beautiful part of the country.

N/A

It would be very helpful if a map or guide of trolling lines or drifts was available, as opposed to just receiving verbal directions,

close the mink farm - make it easier to get day tickets for the rivers

Encourage more catch and release

Object most strongly to fish farming

I have fished Waterville from around 7 years of age and loved going down with my dad, Now the lakes are all private can't go near a river, I wouldn't mind paying into the development fund but having to pay for the days fishing on top of the trip is a bit much.

Stocks of Sea Trout in particular have declined significantly over last 25 years

Keep up the good work. Love the place

boat and engine charges for an angler fishing on his own especially an oap are much to high i would suggest 30 euro max

salmon aquaculture industry will destroy the sea trout resource in Waterville if expanded

Lovely Area

A stronger culture of Catch & Release needs to be encouraged by all, visitors and locals.

implement catch & release for Salmon

As a party we fished every year for over 30 yrs. some have passed on, and some have babies now. I am returning this year to fish for bass and maybe on the lake, and also paint pictures.

Please move Waterville closer to monaghan

N/a

Probably the best run system in Ireland. Keep up the good work!

Keep the lake open from the 17th of Jan, it is the best fishing, but the quietest for paying punters so it is a perfect time for serious fishermen.

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