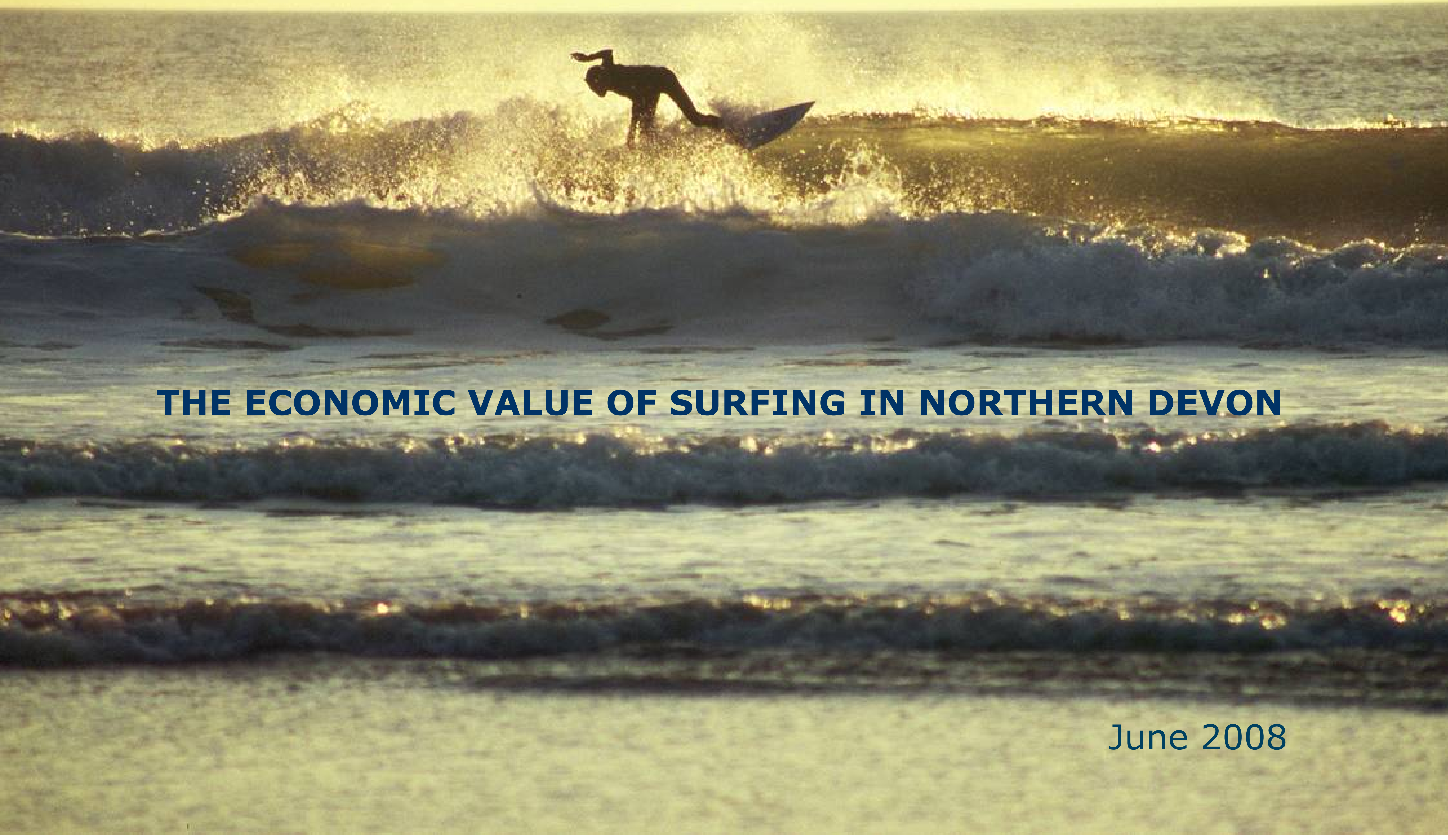
THE TRISURF REPORT



THE ECONOMIC VALUE OF SURFING IN NORTHERN DEVON

June 2008

Acknowledgements

This study would not have been possible without the generous help of many people. Particular thanks go to Isabelle Bromham, who spent many hours interviewing surfers and distributing and collecting surveys, and whose data provided a major contribution to this study. Also thanks to Pilton Community College who assisted with the design of the schools survey and hosted it on their website, and to all the students who completed the survey, in particular students at Ilfracombe Community College who achieved such a high response rate. Special thanks to Marsdens Cottage Holidays who kindly distributed the second home owners survey. Many thanks to the team at Devon Renaissance for expertly guiding TRISURF through the survey and reporting process to make the very most out of this research project. Finally, TRISURF is grateful to all those who took the time to share their views through the various surveys, without which this study would not have been possible.

Chris Farris, Watersports Project Co-ordinator, TRISURF

Report written by Liz Abell and Simon Mallett

This research was made possible with funding from:

Disclaimer

This report is printed on Evolve Printed on Evolve recycled paper which is made from 100% recycled fibres from UK waste, which diverts 18,000 tonnes of waste each year.
ISO 14001 accredited

Contents

1 Executive Summary

1.1 This research was undertaken to start to fill a void in our understanding of surfing as an economic driver. It was commissioned by TRISURF and carried out by Devon Renaissance.

1.2 Due to the lack of primary research resources, the priority for the research was to develop a series of datasets covering visitors, locals, second home owners and school pupils, and for each group to identify surf related spending habits.

1.3 Further to this a literature review was undertaken to provide a context for the findings, although one of the main findings from this was a lack of previous research. As a result, a policy of caution was applied to all the findings of this study, with the recommendation that they should be reinforced through further research as a priority.

1.4 The response rates were good for most of the survey work, ensuring that conclusions drawn here based on that research are statistically robust.

1.5 From this it was established that there are approximately 42,000 people who surf in northern Devon each year, and that each of them spend approximately £1,240 annually in relation to their surfing visits.

1.6 This gives a total annual economic value of surfing in northern Devon of £52.1 million.

1.7 From the limited available evidence regarding surfing related businesses in the area, it appears that they are performing well in the context of a weak wider economy.

1.8 Plentiful opportunities are identified to expand the surfing market, with the caveat that such expansion needs to be managed carefully to ensure that the features that make northern Devon a destination of choice are not destroyed.

1.9 The surfing industry plays an important role in the local economy of northern Devon, and it warrants a much more detailed understanding than has been achieved previously as it could be a key factor in driving the economy forwards.

2 Introduction

2.1 Northern Devon[1] is one of Britain's prime surfing areas and boasts a number of high quality surfing beaches, as shown in figure 1 below. With the increase in popularity of the sport, and the attraction of more affluent devotees, this has a growing significance on the economy of an area historically characterised by depressed economic productivity and a poorly diversified economic base.

2.2 TRISURF, a tri-partite community surfing initiative funded through the LEADER+ programme, commissioned Devon Renaissance to undertake research work into the economic value of surfing in northern Devon. The purpose of this research was to provide an evidence based economic valuation of the surfing industry to northern Devon, and then to examine this in more detail to identify key factors affecting this, and the potential for this figure to be increased. Where such opportunities are identified, this would then act as an evidence base to help access future public and private funding for both TRISURF and other initiatives in this area.

2.3 Due to the lack of previously available primary research, the research focused on undertaking, analysing and drawing conclusions from a series of paper, face to face and web-based surveys with surfers, schoolchildren, visitors to the area and second home owners[2]. To supplement this and provide context for the report, a detailed literature review was also undertaken.

2.4 As a result, the research draws together a range of perspectives on surfing, and provides the most comprehensive overview to date of the current and potential economic impact of the surfing industry in this locality.

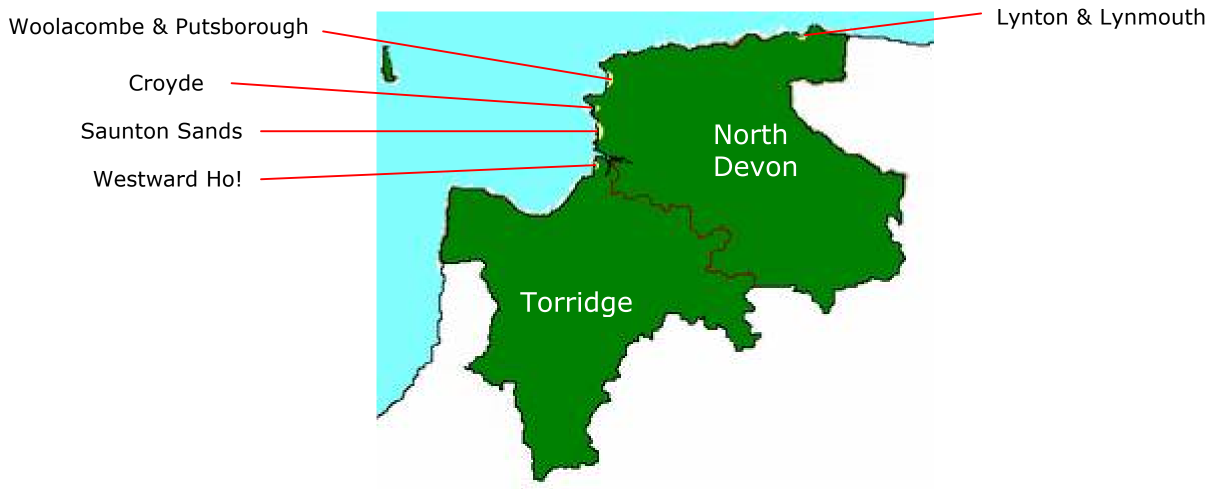


Figure 1 - Map of northern Devon Showing Main Surfing Beaches

[1] Northern Devon is defined as the local authority areas of North Devon and Torridge District Councils.
[2] Not all of these surveys were designed and carried out by Devon Renaissance, but they were all compiled and analysed by Devon Renaissance, as detailed in section 3 - Methodology

3 Methodology

3.1 There were five key elements to the research[3], the methodology for each of which is described below:

- Economic survey (paper based and web surveys)
- Visitor survey
- Second homes survey
- Schools survey
- Literature Review

3.2 *Economic Survey*

3.2.1 The survey was designed by Devon Renaissance in consultation with TRISURF to quantify individual expenditure on surfing visits both to northern Devon and elsewhere. The survey went on to explore the nature of their visits, the factors affecting their decisions on where to surf and their satisfaction with various locations, and complemented this with demographic questions including age, gender, income and home location of respondents (copy attached at Appendix A).

3.2.2 The paper based survey was designed as an insert to the TRISURF brochure, which was distributed via a mailshot to a contact database of known surfers and those with a retail/wholesale trade connection to surfing (as detailed in appendix A1), accompanied by a letter explaining the reason for the survey and a freepost return envelope.

3.2.3 The web-based survey was designed to exactly replicate the above paper-based survey, and was hosted via SurveyMonkey[4]. It was publicised widely in local and regional press (North Devon Journal and Western Morning News), and was promoted through the TRISURF website and Southwest Tourism's monthly e-newsletter (distributed to approximately 20,000 SWT-registered tourism businesses in south west England) both with direct meta-links to the survey.

3.2.4 An incentive was offered to those completing the survey in the form of entry to a competition to win a TRISURF goody bag.

3.2.5 Surveys were completed throughout the summer and autumn 2007, and the resulting data was input and analysed using SPSS.

3.3 *Visitor Survey*

3.3.1 This was designed by an MSc student at Greenwich University[5] in consultation with Devon Renaissance to ensure consistency of question wording with the Economic Survey where possible. This was intended to enable aggregation of the data to increase the overall sample size on critical questions (copy attached at Appendix B).

---

[3] In order to complement this research, a survey was designed and distributed to surfing related businesses in the area, but due to a very low response rate the results are not included in this report. This is an area of further research that would be particularly valuable.

[4] www.surveymonkey.com

[5] Isabelle Bromham carried out this element of the survey design and implementation as part of a complementary research based dissertation towards her MSc which considers not only the economic but also the environmental impact of surfing in northern Devon.

3.3.2 This was implemented in two ways; as a self-complete questionnaire through distribution to local B&Bs and other accommodation providers, and as a script for face-to-face interviews.

3.3.3 Surveys were completed throughout the summer 2007, and the resulting data input by Devon Renaissance, and merged with the Economic Survey for analysis.

3.4 ***Second Homes Survey***

3.4.1 This was designed by the same MSc student at Greenwich University. Again it was developed in consultation with Devon Renaissance to ensure consistency of question wording with the Economic Survey where possible, although the data was analysed separately (copy attached at Appendix C).

3.4.2 This questionnaire was distributed by a property letting agency to known owners of second homes in northern Devon.

3.4.3 Surveys were completed from summer 2007 to early 2008, and the resulting data input by Devon Renaissance and analysed separately using SPSS.

3.5 ***Schools Survey***

3.5.1 This was designed by the TRISURF team in consultation with teachers across the area, and developed with Pilton College ICT department as an example of web-based/electronic media survey technique. The survey was constructed as a web survey hosted by Pilton College, Barnstaple (copy attached at Appendix D). Students in schools across northern Devon were encouraged to complete the survey through communications with headteachers, promotion through internal school magazines and school surf clubs. To increase the survey hit rate, the incentive of a new surf board made using an eco friendly foam core was offered to the surf club at the school with the most hits.

3.5.2 A cross-matching exercise was undertaken by Devon Renaissance to identify questions which either matched or complemented those in the Economic Survey, and these results were analysed separately using SPSS.

4 Survey Response Rates

4.1 The response rates by survey are shown in table 1 below:

	Economic Survey	Visitor Survey	Second Homes Survey	Schools Survey
No of Responses	190[6]	52	83	579[7]

Table 1 – Responses Rates for each survey

4.2 This is broken down to show the home location of respondents to each of the surveys in table 2 below. To illustrate the geographic groupings of responses, a map is shown at figure 2.

Survey	Northern Devon	Rest of South West	South East	Rest of UK	Non-UK	Not Known
Economic Survey	34	77	30	32	6	11
Visitor Survey	0	7	29	15	0	1
Second Homes Survey	10	18	38	16	0	1
Schools Survey	579	0	0	0	0	0
Totals	623	102	97	63	6	13

Table 2 – Response Rates by Survey and Location of Origin

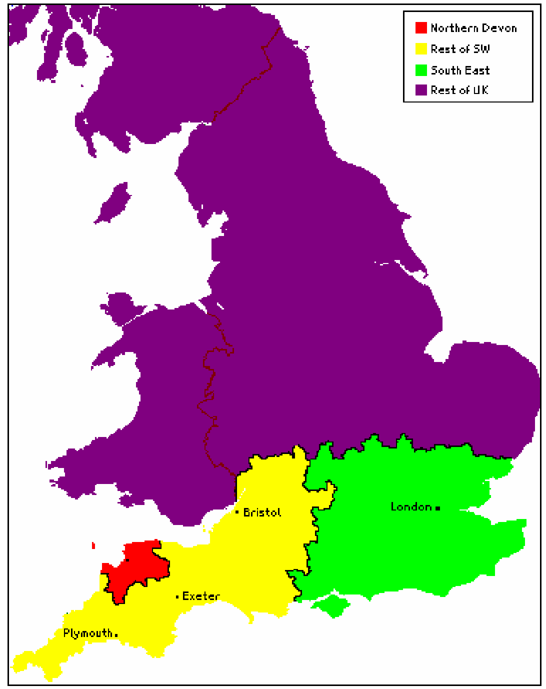


Figure 2 - Map of Geographic Groupings of Responses

[6] 70 paper-based surveys, 120 web surveys
[7] Invalid responses were removed from this dataset

4.3 There was a good representation of respondents from across the UK, with a large number of local respondents from northern Devon, enabling comparisons to be made between the responses made by local residents and those from other areas.

4.4 It should be noted that the schools survey was only distributed to schools in northern Devon.

5 Survey Sample Information

5.1 For each survey the socio-demographic information is presented in this section.

5.2 ***Economic Survey and Visitor Survey Merged Datasets (hereafter referred to as Combined Economic Survey)***

5.2.1 Table 3 below sets out the combined frequencies from the surveys by location of origin.

Location of respondent	Frequency	% (Valid %)
Northern Devon	34	14.7
Remainder of South West	75	32.5
Elsewhere	122	52.8
Totals[8]	231	100.0

Table 3 – Combined Economic Survey respondents by location of origin

5.2.2 The majority of respondents were not local to northern Devon, although there was sufficient local representation to consider the results for this group independently[9].

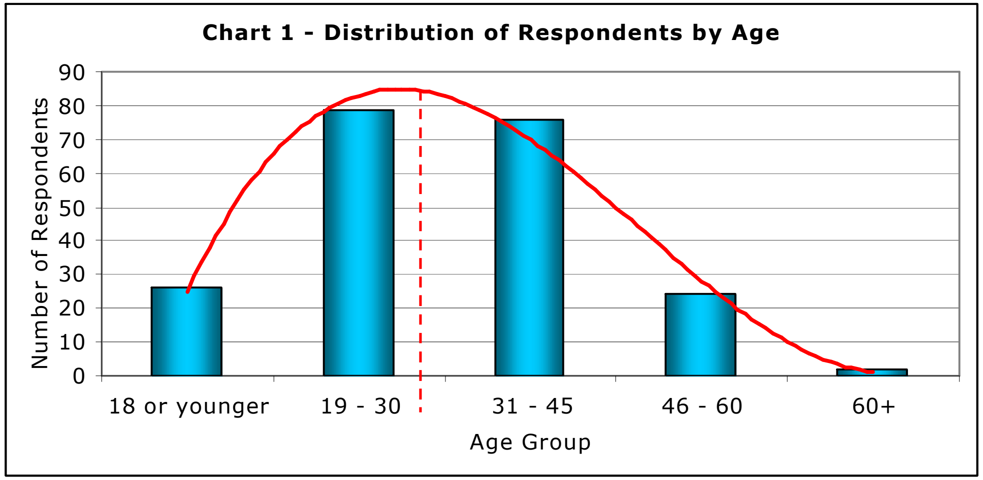
5.2.3 The age groups of respondents are shown in table 4.

How old are you?	Frequency	%
<18	26	12.6
19 – 30	79	38.2
31 – 45	76	36.7
46 – 60	24	11.6
>60	2	1.0
Totals	207	100.0

Table 4 – Combined Economic Survey respondents by age group

[8] The totals given in each table refer to the total number of valid responses to that question in the survey
[9] Detail of statistical significances of specific results are footnoted against the relevant points throughout the remainder of the report

5.2.4 Unsurprisingly, the majority of respondents were aged between 19 and 45, with the average age in the late 20s as illustrated in chart 1.



5.2.5 The breakdown of respondents by gender is set out in Table 5.

What is your gender?	Frequency	%
Male	141	68.1
Female	66	31.9
Totals	207	100.0

Table 5 – Combined Economic Survey respondents by gender

5.2.6 Over two thirds of the respondents were male, although there was sufficient female representation to enable analysis by gender.

5.2.7 The employment status of the respondents is summarised in Table 6 below.

What is your employment status?	Frequency	%
Work full time	96	63.2
Work part time	19	12.5
Student	33	21.7
Do not work	4	2.6
Totals	152	100.0

Table 6 –Economic Survey respondents only by employment status

5.2.8 Over 63% of respondents were in full time work, with the bulk of the remainder students and part time workers; fewer than 3% stated that they did not work and this group included retirees, homemakers and those classing themselves as otherwise 'out of work'.

5.2.9 The annual income bands of respondents are shown in table 7 below.

What is your annual income?	Frequency	%
<£10,000	46	31.7
£10,001 - £20,000	33	22.8
£20,001 - £30,000	29	20.0
£30,001 - £50,000	32	22.1
>£50,000	5	3.4
Totals	145	100.0

Table 7 – Economic Survey respondents only by annual income

5.2.10 There was a wide spread of responses to this, although the average salary for visitors was between £22,000 and £23,000. This compares with the average salary for people working in Torridge of £13,114 and North Devon of £15,486[10].

5.2.11 When the data was categorised[11], three distinct socio-demographic groups of respondents were identified, as illustrated in table 8 below. Where appropriate the findings are broken down into these groupings for comparison purposes.

Socio-Demographic Characteristic	Group 1	Group 2	Group 3
Gender	Mixed	Male	Male
Average Age	25	36	35
Employment Status	Students / Part time workers	Employed full time	Employed full time
Average Income	£11,000	£36,000	£24,000
Home Location	Mainly outside North Devon	All outside North Devon	North Devon or SW
Nature of typical visits	In groups of adults	As a couple / family	Alone or with one adult
No of respondents in group	50	44	47
Name for Group[12]	Student visitors	Family visitors	Local surfers

Table 8 – Socio-demographic groupings of Combined Economic Survey respondents

[10] 2007 Annual Survey of Hours and Earnings, Office of National Statistics.
[11] Categorisation was carried out by cluster analysis, and 141 of the respondents were allocated to groups. The remaining 89 could not grouped, mainly due to incomplete data.
[12] The name for the group is intended for ease of reference through the remainder of the report. It is important to note that the name of the group is simply a typical group member and that within the group there are members with other characteristics.

5.3 *Second Homes Survey*

5.3.1 The majority of second homes owners had their main (or first) home outside the North Devon area, and table 9 illustrates the location of their second home.

Location	Frequency	%
Croyde	16	19.3
Woolacombe	14	16.9
Braunton	7	8.4
Ilfracombe	7	8.4
Putsborough	6	7.2
Instow	4	4.8
Lynmouth	4	4.8
Westward Ho!	4	4.8
Other	21	25.3
Totals	83	100.0

Table 9 – Locations of Second Homes

5.3.2 The most frequent location for second homes was around the Croyde and Woolacombe area, with most choosing to be located in the coastal villages, rather than inland.

5.3.3 Typically, respondents had owned their second home for between 1 and 5 years.

5.3.4 The breakdown of age groups of respondents is shown in table 10.

How old are you?	Frequency	%
<18	0	0.0
19 – 30	3	3.7
31 – 45	26	31.7
46 – 60	42	51.2
>60	11	13.4
Totals	82	100.0

Table 10 – Second Homes Survey respondents by age group

5.3.5 The average age was 49 years.

5.3.6 60% of respondents were female, and 40% were male.

5.3.7 37% of respondents reported that they surf.

5.4 ***Schools Survey***

5.4.1 Table 11 shows the breakdown of responses by school.

Community College	Frequency	%
Ilfracombe	246	42.5
Pilton	175	30.2
Park	63	10.9
Braunton	62	10.7
Bideford	24	4.1
Other	9	1.6
Totals	579	100.0

Table 11 – Schools attended by Schools Survey respondents

5.4.2 The majority of respondents were from Ilfracombe and Pilton Community Colleges.

5.4.3 The respondents were evenly split by gender with 50% males and 50% females.

5.4.4 48% of respondents reported they had surfed at some point in their lives, whilst 52% reported that they had never surfed.

6 Survey Findings

6.1.1 The main findings from each of the surveys will be summarised in the following section.

6.2 *Combined Economic Survey*[13]

6.2.1 Respondents were asked initially to provide some information on their typical surfing visits, irrespective of location, and then asked to explore in more detail their most recent visits to northern Devon and to other locations around the world.

6.2.2 In terms of the composition of travelling groups, respondents tend to most frequently travel with one other adult. Table 12 below summarises respondents by the composition of their travelling group.

When you go, who do you go with?	Frequency	%
With one other adult	99	41.1
With a group of adults	52	21.6
In a group including children	47	19.5
Alone	43	17.8
Totals	241	100.0

Table 12 – Combined Economic Survey respondents by composition of travelling group

6.2.3 Over half of respondents stated that they typically visited as a day trip, as shown in table 13 below.

How long do you typically stay?	Frequency	%
Day trips (not overnight)	94	50.5
Overnight	38	20.4
2 – 6 days	23	12.4
7 – 13 days	20	10.8
Longer	11	5.9
Totals	186	100.0

Table 13 – Economic Survey respondents only by typical visit duration

6.2.4 The bulk of the market is concentrated in short stay visits, with over 83% staying typically for less than a week, and fewer than 6% stating they stayed for 2 weeks or more.

6.2.5 Of the 190 respondents to the Economic Survey, 137 (72%) provided details of their most recent surfing trip to North Devon, and 148 (78%) provided details of their most recent surfing visit elsewhere.

[13] The majority of the analysis in this section relates to questions that were asked only in the Economic Survey, with Visitors Survey results included where they could be matched. Total numbers of respondents are given for each table, and the title indicates which datasets are included.

6.2.6 Table 14 below sets out the relative frequencies with which people surf the main beaches in northern Devon.

Where did you go on your last surfing trip to North Devon?	Frequency	%
Croyde	43	31.4
Lynton and Lynmouth	2	1.5
Saunton	32	23.4
Westward Ho!	11	8.0
Woolacombe and Putsborough	36	26.3
Other	13	9.5
Totals	137	100.0

Table 14 – Economic Survey respondents only by location in northern Devon most recently surfed

6.2.7 At the time of surveying, Croyde was selected most frequently as the most recently surfed beach, which together with neighbouring Saunton, Woolacombe and Putsborough[14] accounted for over 81% of responses.

6.2.8 People were also asked to indicate where they last most recently surfed outside of northern Devon, with responses as shown in table 15.

Where did you go on your last surfing trip elsewhere?	Frequency	%
Cornwall	70	47.3
South Devon	9	6.1
Other South West	5	3.4
Other UK	23	15.5
Europe (including The Canaries)	26	17.6
Far East & Australia	7	4.7
Other Worldwide	8	5.4
Totals	148	100.0

Table 15 – Economic Survey respondents only by location outside of northern Devon most recently surfed

6.2.9 Nearly half indicated that they last surfed most recently in Cornwall, with fewer than 10% surfing elsewhere in the south west.

6.2.10 The following results seek to draw some comparisons between the visiting habits of visitors to northern Devon and elsewhere.

6.2.11 Data on where people were accommodated on their last surfing trip to northern Devon and their last trip elsewhere is summarised in Table 16 below.

[14] See map in Section 1 – Introduction for locations of main surfing beaches

On your last surfing trip, where did you stay?	Northern Devon		Elsewhere	
	Frequency	%	Frequency	%
Camping/camper van/car	55	32.5	52	38.0
B&B/pub	38	22.5	3	2.2
Own home/2nd home	35	20.7	31	22.6
Self-catering accommodation	15	8.9	18	13.1
With friends/family	11	6.5	11	8.0
Holiday park	11	6.5	7	5.1
Hotel	4	2.4	15	10.9
Totals	169	100.0	137	100.0

Table 16 – Economic Survey respondents only by accommodation type on most recent surfing trip to northern Devon

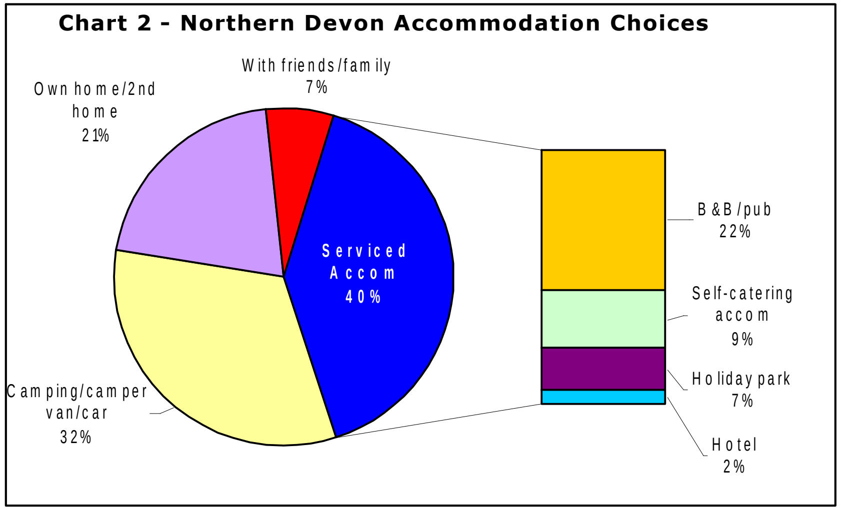
6.2.12 Visitors to both northern Devon and elsewhere most frequently camped or stayed in their cars or camper vans (33% in northern Devon and 38% elsewhere).

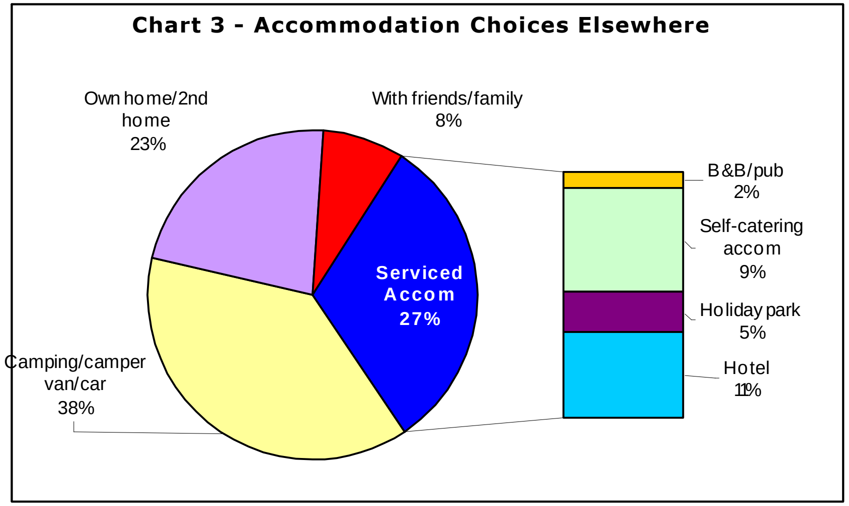
6.2.13 In terms of the holiday accommodation industry, visitors to northern Devon were most likely to choose a B&B or pub (23%), whilst visitors to other locations tended to stay in self-catering accommodation (13%) or hotels (11%). This is likely to reflect the substantial numbers of people surfing outside of the UK where accommodation options are different.

6.2.14 Visitors to both northern Devon and elsewhere often stayed in their own home or a second home, and visited surfing beaches from there. In northern Devon this is mainly a reflection of the number of local respondents who make day trips to beaches from their homes, rather than second home owners who, whilst a significant population, are relatively small in absolute terms[15].

6.2.15 The comparison is illustrated in charts 2 and 3 below, which clearly shows that serviced accommodation is used more frequently in northern Devon than elsewhere, although the type of serviced accommodation differes.

[15] See the Homes Survey element of this section for further detail on this





6.2.16 In determining the true impact of surfing on the economy, it is important to understand whether the effects are actually because of surfing or whether surfing is an incidental activity and not a driver of the economic effects.

6.2.17 People were therefore asked whether they had ever chosen a holiday destination primarily in order to surf as shown in table 17.

Have you ever chosen a holiday destination primarily in order to surf?	Frequency	%
Yes	148	80.0
No	37	20.0
Totals	185	100.0

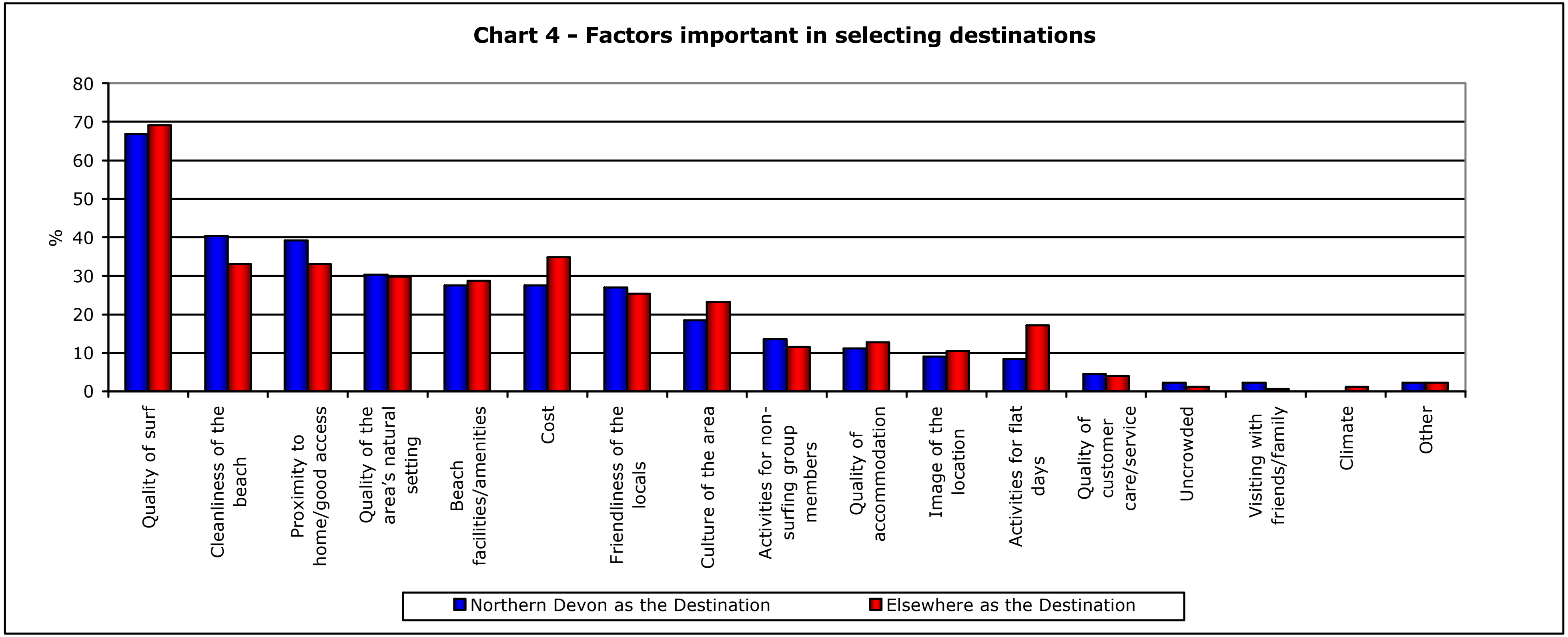
Table 17 – Economic Survey respondents only by role of surfing in selecting holiday destinations

6.2.18 80% of respondents indicated that they had chosen a holiday destination primarily in order to surf. This is an important finding as it demonstrates the influence of surfing in destination decisions, and therefore the direct economic influence of surfing[16].

6.2.19 This finding was consistent across the three identified socio-demographic groups; Student Visitors (79%), Family Visitors (86%) and Local Surfers (80%).

[16] This is explored further in the Analysis and Conclusions section.

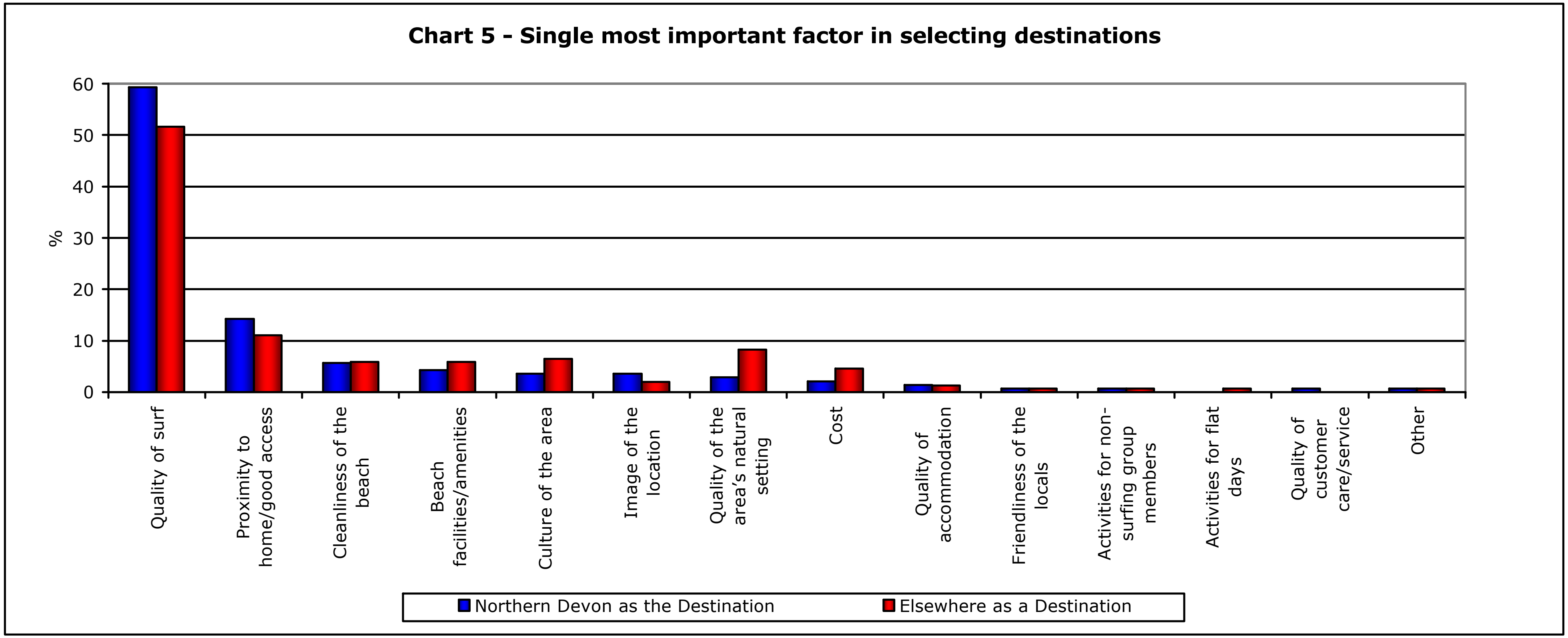
6.2.20 Respondents were asked to identify all of the factors they felt to be important in selecting northern Devon and elsewhere as destinations, as shown in Chart 4 below.



6.2.21 The broad patterns were similar, with quality of surf most frequently identified as an important factor (67% and 69% respectively). In selecting northern Devon, the cleanliness of the beaches (40%) and proximity to home/good access (39%) were also frequently identified, whereas cost (35%) and proximity to home/good access (33%) were next most highly ranked for other locations.

6.2.22 Visiting friends and family, uncrowded beaches, the climate and other responses were infrequently identified as important factors in destination selection (these responses were collated from an open-ended query; from the main 'pick list', quality of customer care/service was least frequently identified at around 4%).

6.2.23 Respondents were then asked to identify the single most important factor influencing destination selection, as shown in chart 5



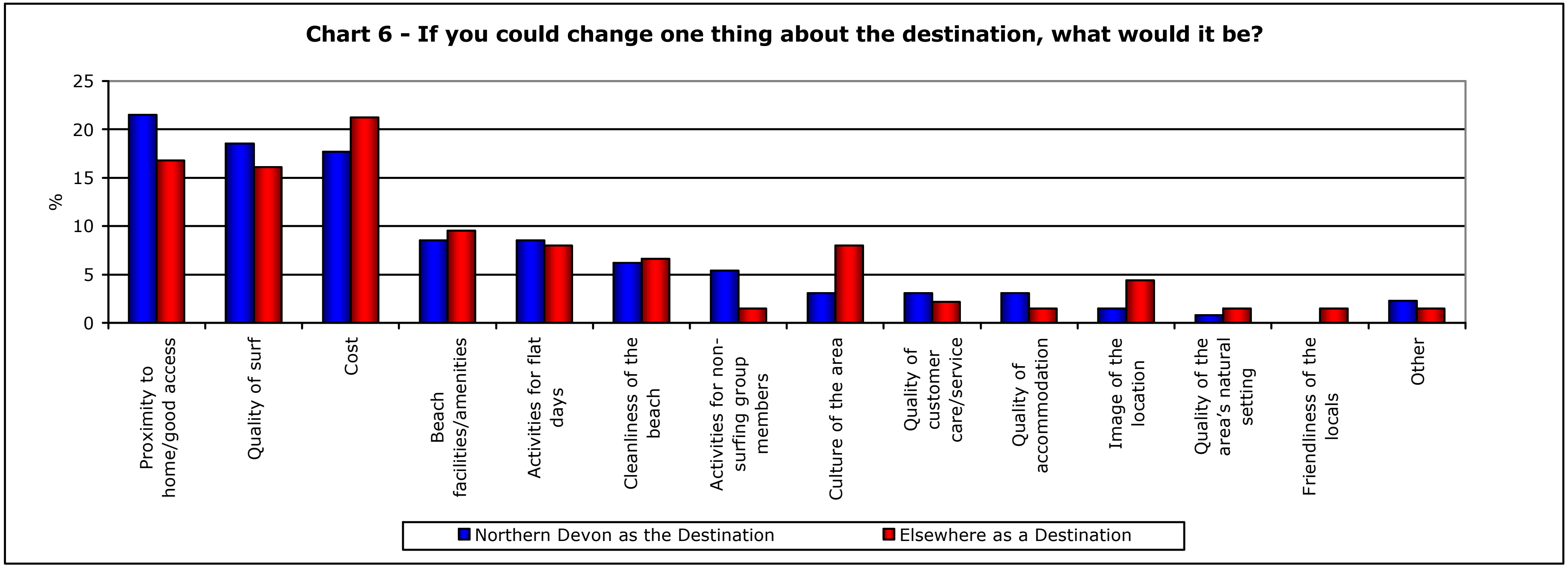
6.2.24 Again it was the quality of the surf that was top ranked (59% for northern Devon and 52% for elsewhere). For both geographies, proximity to home/good access was ranked next most importantly (14% and 11% respectively).

6.2.25 It is interesting to note that activities for non-surfing group members were lowest ranked in terms of importance at less than 1%. This reinforces the point made above that surfing is key to the respondent group in making visiting decisions which have a direct economic consequence.

6.2.26 For the different socio-demographic groups there were some differences in their priorities in selecting a destination. For local surfers, proximity to home was an important factors (23%), and for family visitors good access to the beach was important in northern Devon (22%), whilst this was not of concern to the student visitor group.

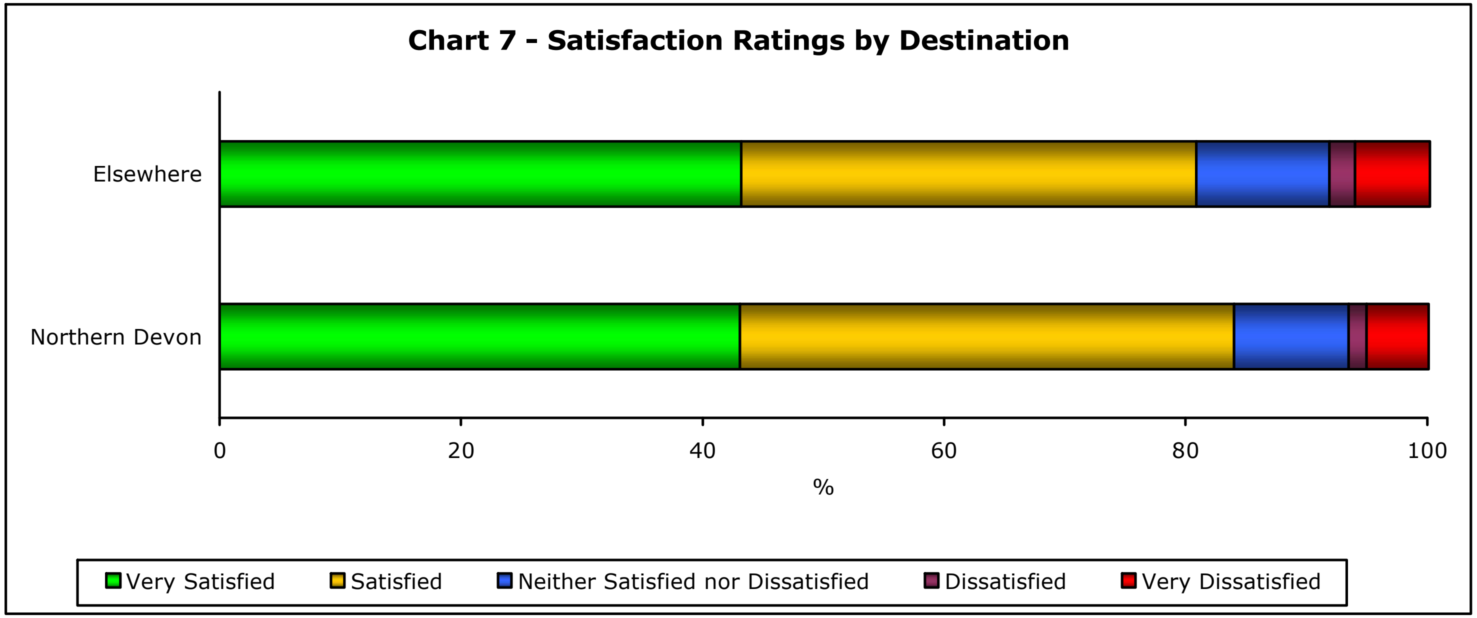
6.2.27 In selecting destinations elsewhere, the quality of the natural setting rose in importance for the family visitors and student visitors, whilst the local surfers were more concerned with the quality of the surf.

6.2.28 Respondents were asked to identify the one key thing they would like changed about both northern Devon destinations and destinations elsewhere, as shown in chart 6 below.



6.2.29 Proximity to home/good access (22%) was top ranked in northern Devon, followed by quality of surf, whilst cost (21%) was identified most frequently elsewhere as the one thing they would like changed.

6.2.30 Chart 7 below summarises the satisfaction ratings given by Economic Survey respondents in relation to their last surfing trip to northern Devon and elsewhere.



6.2.31 Satisfaction levels were high for both destinations, with the rating for northern Devon averaging at 4.15 (out of 5) against a rating of 4.10 for elsewhere. For comparison purposes, it was possible to calculate an average score for Cornwall which, at 4.17 (*n=66*), was very similar to that of northern Devon.

6.2.32 In northern Devon, the satisfaction rating was highest for Saunton Sands as a destination at 4.31 *(n=32).*

6.2.33 The family visitors rated destinations in northern Devon significantly more favourably (at 4.43) than destinations elsewhere (at 4.0)[17].

6.2.34 The local surfers, on the other hand were most negative about northern Devon, rating destinations there at only 3.95, and rating destinations elsewhere at 4.21.

[17] P<0.05 using Wilcoxon's matched Pairs test

6.2.35 In order to understand the economic impact of the visitors, information was gathered about spending on their most recent visits to northern Devon and elsewhere, with the average spend per trip illustrated in table 18.

Average spend per surfing trip[18]	**Northern Devon**	**Elsewhere**
Accommodation (including travel if purchased as a package[19])	£63	£253
Surfing (including hire and/or purchase of boards, wetsuits, clothing, accessories such as leashes, rash vests, etc)	£40	£33
Food and drink[20]	£47	£169
Travel (airfare, fuel, train fare, parking, etc)	£35	£184
Other (including souvenirs, arts/crafts, newsagents, etc[21])	£8	£32
Totals	**£193**	**£671**

Table 18 – Combined Economic Survey respondents by average spend per surfing trip

6.2.36 As expected (given the number of local residents within the respondent group and the number of overseas trips within the 'elsewhere' category), the average cost per trip was significantly higher outside of northern Devon at £671 compared to £193.

6.2.37 Of all of the cost categories, 'surfing' was the only one where more was spent on average in northern Devon than elsewhere (£40 compared to £30 respectively).

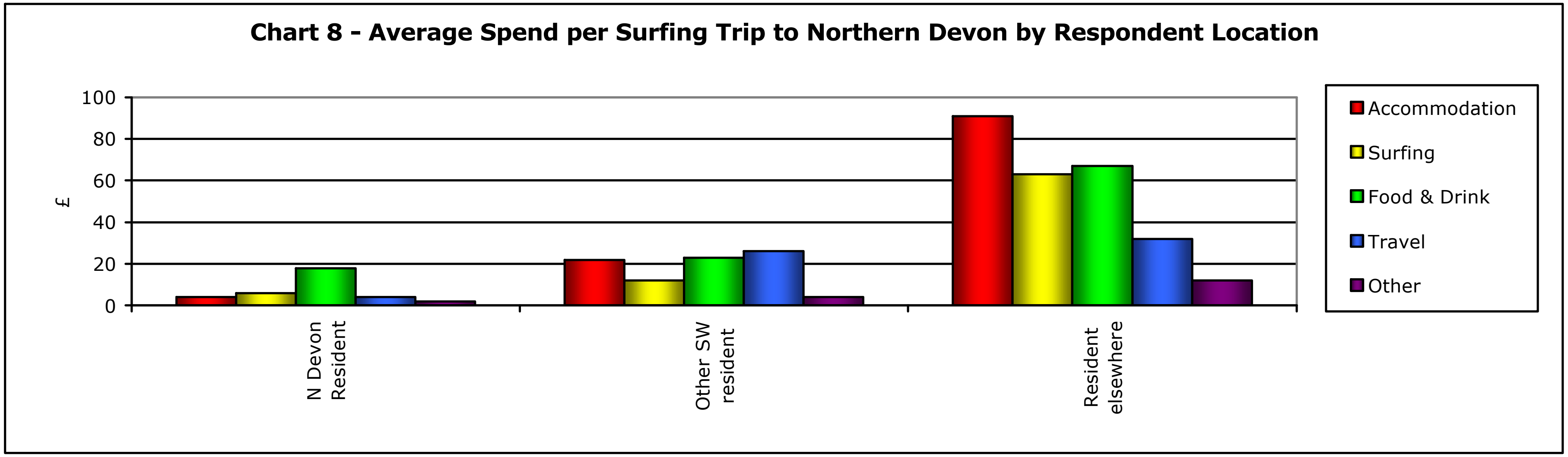
6.2.38 When the spending is broken down by the different socio-demographic groups, the differences between overall expenditure in northern Devon and elsewhere become more pronounced, as shown in table 19 below.

Average Spend per trip	**Student visitors**	**Family visitors**	**Local surfers**
To North Devon	£180.87	£277.26	£65.87
Elsewhere	£407.31	£965.24	£482.61
Scale of difference	2.2 x	3.5 x	7.3 x

Table 19 – Spend per trip for Socio-demographic groupings by destination

18 Visitor survey provided information on per annum basis as opposed to per trip, which was then calculated pro rata based on the number of trips stated per individual respondent.
19 The Visitor Survey data did not include the caveat to include travel costs if purchased along with accommodation as a package and this, therefore, represents a downside estimate.
20 Due to inconsistent categorisation between the Economic Survey and the Visitor Survey, 'Food and Drink' has been calculated as a composite of the 'pubs/inns', 'local food store', 'tea room/cafe', 'superstore', 'takeaways' and 'restaurants' categories set out in the Visitor Survey returns.
21 Due to inconsistent categorisation between the Economic Survey and the Visitor Survey, 'Other' has been calculated as a composite of the 'art/craft galleries', 'chemist', 'post office', 'newsagent' and 'internet cafe' categories set out in the Visitor Survey returns.

6.2.39 To reinforce this, in terms of average spend in northern Devon, the more local the respondent, the lower the spend, as summarised in Chart 8 below.



6.2.40 North Devon residents spent an average of only £34 per visit, whilst other South West residents spent £87 and visitors from further afield spent £265.

6.2.41 Fairly obviously, the cost of accommodation is a critical factor in the differences in expenditure for respondents from different locations, and the costs of both travel and food and drink increase in proportion to distance travelled to reach the destination.

6.2.42 In order to gain a fuller picture of the visiting and spending habits of respondents, they were asked how frequently they visited northern Devon to surf, as shown in table 20 below.

Average number of surfing trips per annum to northern Devon by location of respondent origin	**North Devon resident[22] *(n=34)***	**Resident elsewhere *(n=50)***
Trips per annum	39.79	5.18

Table 20 – Economic Survey respondents only by average number of surfing trips to northern Devon per year

6.2.43 The average number of visits for northern Devon residents was 7.7 times greater than for non locals

[22] These figures are based on the conservative assumption that 90% of surfing trips made by North Devon residents are to North Devon beaches.

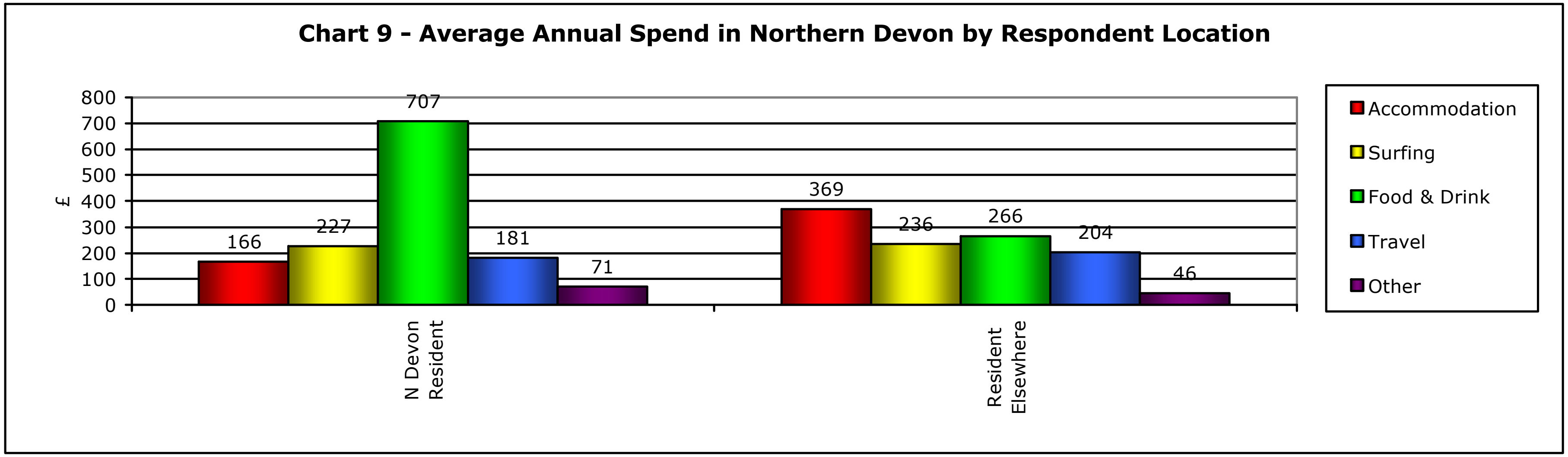
6.2.44 By combining the data on average spend per trip and the average number of trips, the average annual spend can be calculated, as shown in table 21 below.

	North Devon Resident	Resident Elsewhere
Average spend per surfing trip	£33.96	£216.35
Trips per annum	39.79	5.18
Average Annual Spend	£1,358	£1,121

Table 21 – Calculation of Average Annual Spend

6.2.45 The high frequency of trips made by northern Devon residents offsets the lower average spend per trip to yield a higher average annual spend than visitors resident outside of northern Devon - £1,358 against £1,121.

6.2.46 This is broken down by cost category in chart 9 below.



6.2.47 For northern Devon residents food and drink forms the greatest part of their expenditure, whilst for others the spend is more evenly distributed.

6.2.48 The importance and meaning of these results will be explored further in section 8.

6.3 ***Second Homes Survey***

6.3.1 This survey sought to determine the influence of surfing on second homes owners decisions in terms of lifestyle as shown in table 22.

Did you choose North Devon as a location for your 2nd home because of the surfing lifestyle?	**Frequency**	**%**
Yes	15	18.3
No	67	81.7
Total	82	100.0

Table 22 – Second Homes Survey respondents only by surfing lifestyle as an influence on second home location

6.3.2 A substantial proportion (18%) of second home owners stated that the surfing lifestyle influenced their decision to buy a second home in northern Devon.

6.3.3 Table 23 below explores this further from an investment perspective.

I chose to invest in a property in North Devon because it is a popular destination with surfers	**Frequency**	**%**
Strongly agree	11	14.1
Agree	23	29.5
Neither agree nor disagree	29	37.2
Disagree	7	9.0
Strongly disagree	8	10.3
Total	78	100.0

Table 23 – Second Homes Survey respondents only by popularity of northern Devon as a surfing destination as an influence on property investment decisions

6.3.4 44% of respondents indicated that they invested in property in northern Devon because it is a popular destination with surfers.

6.3.5 A significant proportion of the housing stock in northern Devon is not available for residential use, with over 4,400 houses listed as second homes. This constitutes 4.6% of the total housing stock of 96,209[23] (Countryside Agency research shows that the North Devon District Council area is the 10th highest (out of 355 areas), in terms of all household spaces taken up by second residences and holiday homes).

6.3.6 No figures are available to identify the proportion of second homes that are near the northern Devon coast. It is therefore not possible to calculate the total numbers of home owners who base their investment decisions at least in part on the fact that northern Devon is a popular destination with surfers, however the indications are that there are sufficient to yield a direct economic effect on the area.

6.3.7 It is beyond the scope of this study to quantify the nature and effect of the economic impact of surfing on second home owners, or to consider the negative impacts associated with the high rates of second home ownership in the area. Further research into this area would be of value to fully understand this element of the value of the surf economy.

[23] ONS query on 2006 data – National Statistics Online: http://www.statistics.gov.uk.

6.4 *Schools Survey*

6.4.1 This survey sought to gather the views of the future generation of surfers in the area and future business people who will potentially be affected by the surfing economy. It was primarily aimed at the 13 – 16 year old age group[24].

6.4.2 Students were initially asked whether or not they surf and how frequently, as shown in table 24 below.

Do you surf?		Frequency	%
Yes		276	47.7
Breakdown	Often (every time there are good waves)	117	20.2
	Sometimes (2 – 10 times per year)	83	14.3
	Rarely (once or less per year)	76	13.1
No		303	52.3
Respondents		579	100.0

Table 24 – Schools respondents only by participation in surfing

6.4.3 The results were fairly evenly split between those who surf and those who don't. Of those that did surf, almost half surfed frequently.

6.4.4 Based on the most up to date school pupil numbers, it is possible to calculate an approximation of the total number of students from each school that surf as shown in table 25 below.

School[25]	No of Pupils[26]	% that surf	% that surf often	Estimated total number that surf	Estimated total number that surf often
Pilton	1403	57.1	30.9	801	434
Ilfracombe	1352	33.3	7.3	450	99
Braunton	735	74.2	24.2	545	178
Park	1423	34.9	14.3	497	203
Total	**4913**	**N/A**	**N/A**	**2293**	**914**

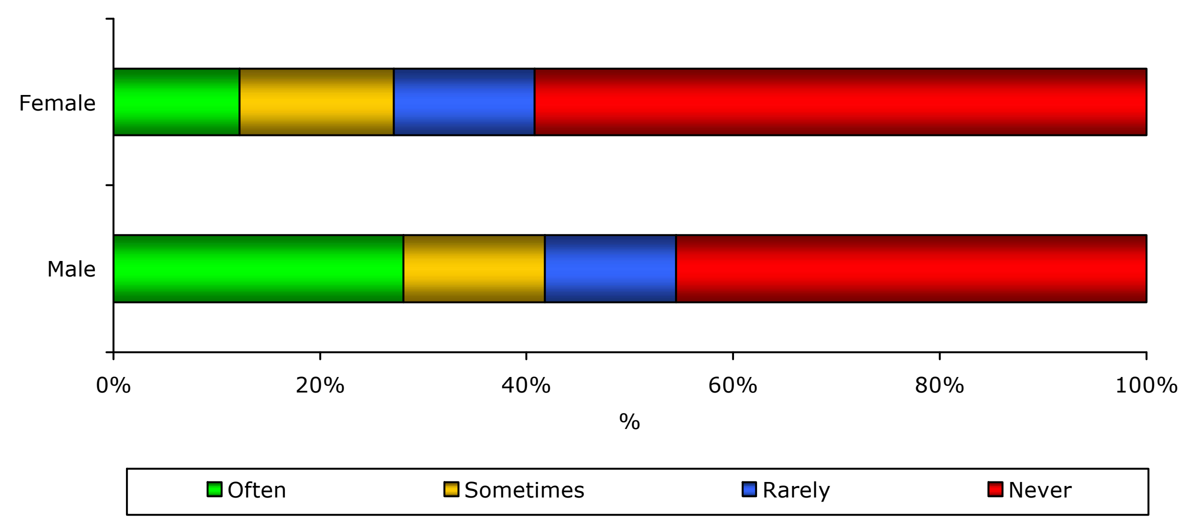
Table 24 – Estimated total number of surfers by school

[24] As this was hosted on the internet, the age range of actual respondents could not be restricted, however, as many completed the survey as part of a scheduled lesson, it is safe to assume that the majority fit within this target age group.
[25] Only those schools for which sufficient responses were received are included in this table.
[26] Source: Department for Children, Schools and Families; www.dcsf.gov.uk

6.4.5 From the available information, it can be estimated that over 2,200 secondary school pupils in northern Devon surf, and of those over 900 surf regularly. These are conservative estimates but already start to indicate the potential size of the future generation of surfers who will affect, and be affected by, the surfing economy.

6.4.6 There are differences in this picture when considered by gender, as shown in chart 10 below.

Chart 10 - Surfing Regularity by Gender; How often do you surf?



6.4.7 Males were more likely to surf than females (58% against 42%) and more likely to surf more frequently (28% compared with 12%).

6.4.8 Respondents were asked to report their expenditure on surfing related items in the last year. This specifically related to boards, wetsuits, surfing accessories (eg, leashes, rash vests, etc) and surf brand clothing from surf shops, and is therefore comparable to the Combined Economic Survey category of 'Surfing'.

6.4.9 The total value of surfing expenditure for the surveyed group was £132,525, or £229 per student.

6.4.10 From the Combined Economic Survey, the average annual spend figure for North Devon residents was £205 (see chart 7) marking strong cross validation of the figures between surveys.

6.4.11 When the average spend results were compared with the frequency of surfing, the expected relationship between higher frequency of surfing and increased spend was found, as shown in table 25 below.

Spend[27] and Frequency of Surfing	Average Spend Per Year (£)
All Respondents	£229
Surf Often	£564
Surf Sometimes	£319
Surf Rarely	£220
Do not surf, but purchase surf brand clothing from surf shops	£77

Table 25 – Average spend for schools' respondents only by surfing frequency

6.4.12 It is of note that even those indicating that they did not surf contributed to the wider surf economy through buying surf brand clothing from surf shops (£77 on average per year). The reasons for this were not explored in the survey, but it may be that surfing as an activity has a positive image, beyond the sport itself, with which non-surfers wish to associate.

6.4.13 Students that identified that they surfed were asked for their opinions on a range of surfing related issues.

6.4.14 Chart 11 illustrates the attitudes of students to visitors on a range of surfing related issues. Given the economic importance of visitors and the linkages to surfing these responses have a particular relevance in terms of the future of the area.

6.4.15 Chart 12 illustrates the opinions of students on a range of other surfing related issues, and on their own aspirations to get involved in surfing as part of their education and future career.

[27] Spend data collated in bands; £0-9, £10-50, £51-100, £101-200, £201-300, £301+. In keeping with the cautious approach to this survey data, when calculations were performed on the results, the mid point of each band was used and the top band was calculated at £300, ensuring that the figures generated are lower estimates.

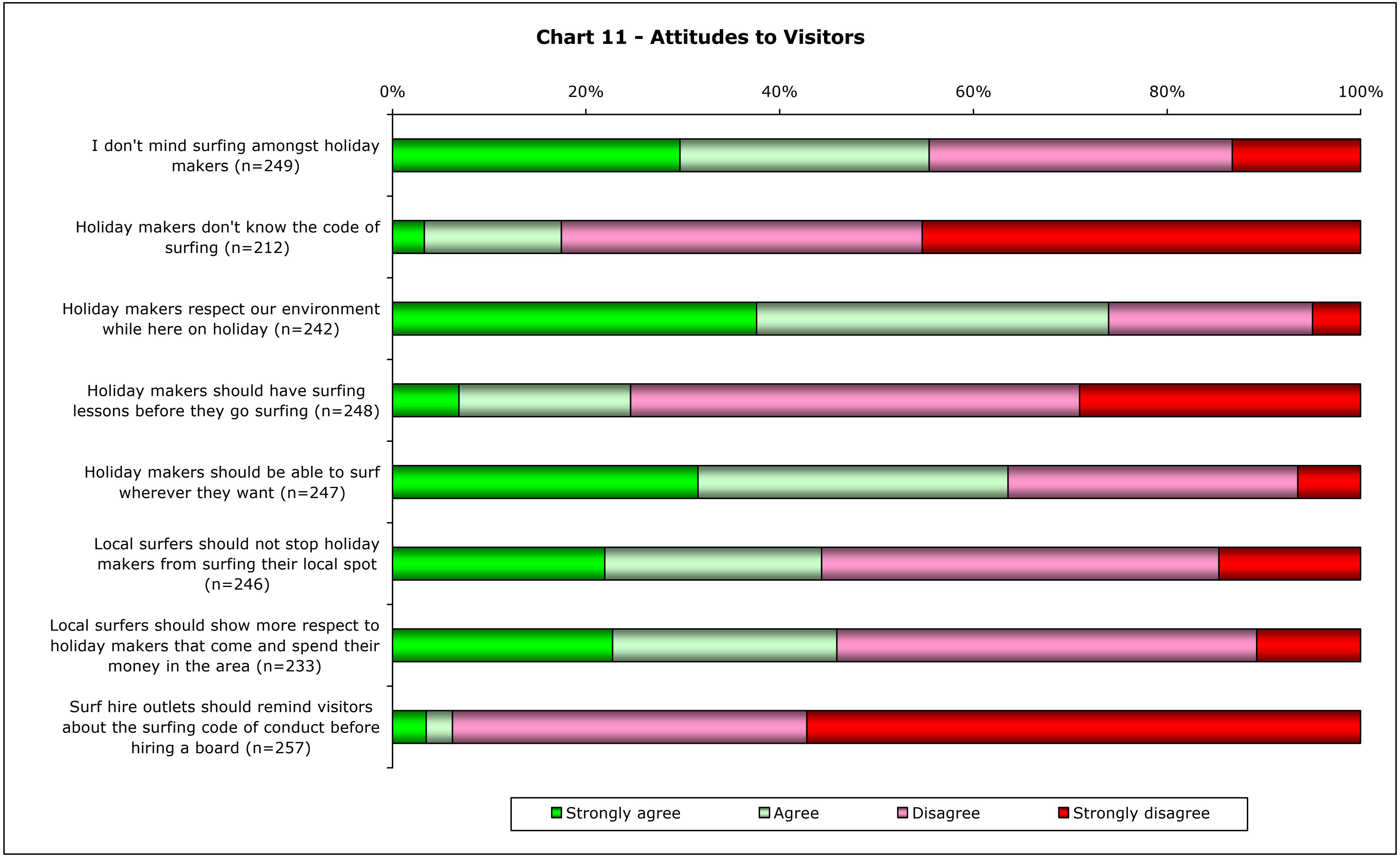


Chart 11 - Attitudes to Visitors
0%
20%
40%
60%
80%
100%
I don't mind surfing amongst holiday makers (n=249)
Holiday makers don't know the code of surfing (n=212)
Holiday makers respect our environment while here on holiday (n=242)
Holiday makers should have surfing lessons before they go surfing (n=248)
Holiday makers should be able to surf wherever they want (n=247)
Local surfers should not stop holiday makers from surfing their local spot (n=246)
Local surfers should show more respect to holiday makers that come and spend their money in the area (n=233)
Surf hire outlets should remind visitors about the surfing code of conduct before hiring a board (n=257)
Strongly agree
Agree
Disagree
Strongly disagree

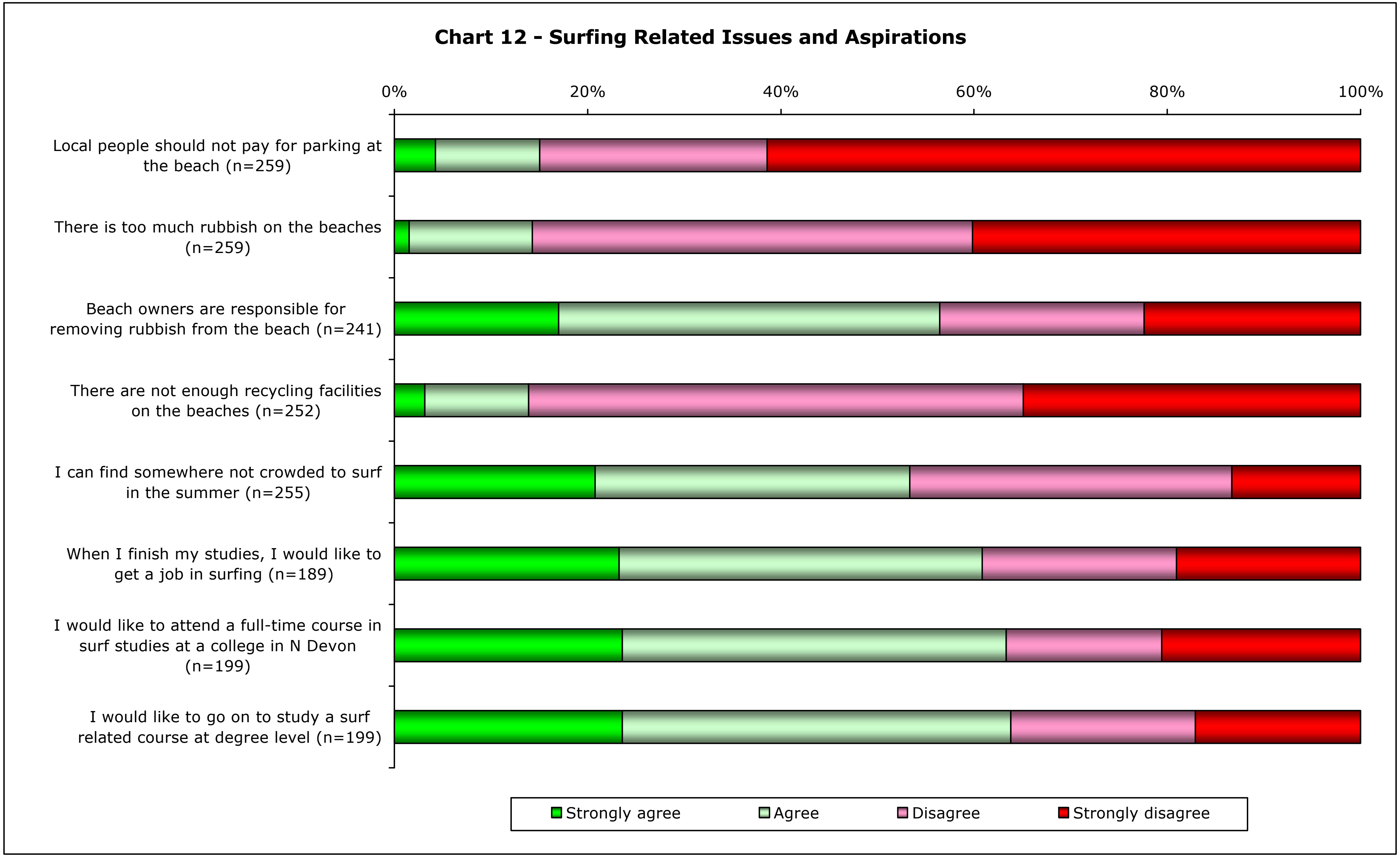


Chart 12 - Surfing Related Issues and Aspirations
0%
20%
40%
60%
80%
100%
Local people should not pay for parking at the beach (n=259)
There is too much rubbish on the beaches (n=259)
Beach owners are responsible for removing rubbish from the beach (n=241)
There are not enough recycling facilities on the beaches (n=252)
I can find somewhere not crowded to surf in the summer (n=255)
When I finish my studies, I would like to get a job in surfing (n=189)
I would like to attend a full-time course in surf studies at a college in N Devon (n=199)
I would like to go on to study a surf related course at degree level (n=199)
Strongly agree
Agree
Disagree
Strongly disagree

6.4.16 The attitudes of the students to visitors are very mixed, with only around half showing a positive attitude (agree or strongly agree with the relevant statements) to welcoming holiday makers to share the local beaches and facilities

6.4.17 Around half of the students expressed an interest in surfing either as part or their education and / or as a potential future career.

6.4.18 Further to this, 83 students (30% of the surfers) stated that they would like to become a professional surfer. Whilst this should be treated with caution (as the exceptional ability required to be a professional surfer, and the very limited opportunities are prohibitive for the majority), the highly positive attitude to surfing and belief that it can be a career option are important.

6.4.19 In the light of this, the survey went on to seek suggestions for ways in which young surfers could be better supported in northern Devon. The most frequent responses are shown in table 26 below.

How could young surfers be better supported?	No of times suggestion made
More/Better lessons (safety, surfing code of conduct, etc)	65
Cheaper/Subsidised equipment and/or lessons	51
Other	48
Surf clubs and surf schools	47
More/Better competitions and/or festivals	27
Schools playing a more active role	21
Surfer-sympathetic transport and parking arrangements	18
Marketing of the sport	16
More/Better sponsorship opportunities	13
Locals only beaches and/or times	11
Improved facilities	11
Safeguarding and/or improving the environment	9

Table 26 – Schools survey suggestions to support young surfers

6.4.20 There are a number of opportunities identified which could be followed up in order to support future generations, many of whom exhibit a very positive attitude to surfing.

7 Literature Review

7.1.1 In order to provide context to the survey data, a comprehensive literature research phase was undertaken.

7.1.2 Despite anecdotal opinion that surfing contributes significantly to the local and sub-regional economies, there has been little historical attempt to understand this in a systematic way.

7.1.3 The overwhelming majority of regional (and indeed national) surfing-specific research relates to Cornwall, where highly conservative estimates put its economic value at £64m annually to the county[28]. There has been no research that yields direct data on the economic value of surfing to northern Devon.

7.1.4 One of the key aims of this was to understand the scale of the market, which can then be combined with the results of the surfing surveys to determine a total value of the surfing economy in northern Devon.

7.1.5 Further to this, the employment economics of surfing were explored, to provide a more rounded economic view, not limited to spend associated with surfing (direct: boards, clothing, gear; and indirect: accommodation, parking, travel, food and drink), but also incorporating the jobs it creates and safeguards – primarily in the tourism sector but also in the specialist retail and manufacturing sectors (referred to below as induced employment effects).

7.2 *The Scale of the Market - Expenditure*

7.2.1 As a starting point, surfing is considered as a leisure activity within the tourism market – and viewed from the demand side of the economics relating to it. Whilst this may fail to directly capture some of the supply side value picked up in models used in the Cornwall research discussed above, it arguably provides a more balanced and relevant picture for the key audiences of this study.

7.2.2 Southwest Tourism data[29] identifies Devon as the greatest contributor to the regional tourism economy by some margin: in 2005, there was a total visitor spend of in excess of £2.25bn in Devon (26% of regional visitor spend). This represents the combined spend of 28% of the region's staying visitors and 21% of the region's day trippers.

7.2.3 When broken down further, northern Devon accounted for 18% of the county's spend figure at £411m, of which £296m related to staying visitors, and £115m to day trippers.

7.2.4 The Southwest Tourism report states that a total of over £20m (or 17.5%) of the £115m spent by day trippers related to the coastal areas alone.

7.2.5 Based on the assumption that the proportion of staying visitor spend relating to the coastal areas would be equivalent, (17.5% of £296m = £52m), we can tentatively ascribe a figure of £72m of annual visitor spend to the coastal areas of northern Devon.

---

[28] *The Sport Economy in Cornwall and the Isles of Scilly*, Sports Industry Research Centre, 2004. The report authors themselves note that this figure is an accepted underestimate of the real value as it is largely supply-side based and fails to accurately capture the full scope of surfing-related manufacturing industry (identified as a sector exhibiting high and stable growth) and the hugely significant value of non-surfing-related visitor spend (eg, food and drink, accommodation, transport).

[29] *The Value of Tourism 2005: Devon*, Technical Appendix to *2005 Economic Value of Tourism Report*, Southwest Tourism, 2006.

7.3 *The Scale of the Market - Jobs*

7.3.1 Tourism related employment in Devon also accounted for just under 50,000 Full Time Equivalent (FTE) jobs – 13% of the total workforce.

7.3.2 Out of an estimated workforce for northern Devon of 72,204, tourism accounts for 16.3% of the total workforce (through direct and induced effects) – 11,796 jobs

7.3.3 Based on the assumption that the numbers of employees required to service the tourist industry are proportionate to the scale of the market financially, at 17.5%, we predict that 2,064 people are employed in coastal tourism.

7.4 *Making the Connection to Surfing*

7.4.1 As a starting point, surfing is considered as a leisure activity within the tourism market – and viewed from the demand side of the economics relating to it.

7.4.2 Whilst this may fail to directly capture some of the supply side value picked up in models used in the Cornwall, what we have now is a workable understanding of the northern Devon coastal tourism market at a gross level. Segmenting this gross picture to distil the surfing-specific market is more difficult[30].

7.4.3 Research commissioned for Cornwall Enterprise in 2001 estimated that 18,494 surfers visited Cornish surfing beaches (36% of whom were local to the area). The research estimated direct spend as £21m annually from this market (per annum averaged at £450 for locals and £1,280 for 'visitors')[31].

7.4.4 Given the year on year popularity growth of surfing[32], these figures are likely to grossly understate the visitor spend value of surfing to the Cornish economy today, but it does provide a starting point in a field with very limited available information.

7.4.5 British Surfing Association data[33] indicates that Cornwall is the most frequently surfed area of the UK (with 33% of those surveyed stating they surfed there), with the remainder of the South West second most frequently surfed (at 27%).

7.4.6 Apart from northern Devon, there are few areas in the South West outside of Cornwall that are intensively surfed. Some parts of the south coast of Devon and Dorset are surfed, but, very conservatively, at least 50% of surfing trips in the southwest outside of Cornwall can be ascribed to northern Devon[34].

---

[30] Although key stakeholders such as the North Devon Economic Partnership (North Devon Action Plan. 2020 Vision, 2007) and North Devon Marketing Bureau refer to surfing as a strength or opportunity in economic development terms, none of these offer any quantification of the current market. Discussions with all of the local tourist information centres also failed to yield anything other than anecdotal and qualitative statements on the numbers of people visiting the beaches in order to surf.

[31] *Assessment of the Potential Contribution of Marinas & Watersports to Increasing Prosperity in Cornwall*, Arup and John Pattison Associates, 2001.

[32] *Survey of the British Surfing Industry – 2005*, British Surfing Association, 2006.

[33] *Surfer Survey*, British Surfing Association, 2007.

[34] Again, robust data relating to the spatial distribution of surfer numbers within the southwest is not available. Analysis of a combination of surf websites and magazines focussed clearly on Cornwall and northern Devon as the 'volume' surfing locations in the region, with occasional mentions of other locations further east and south, but the length of the viable surfing stretches in such locations is small when compared to the aggregate of Woolacombe (and Putsborough), Croyde, Saunton Sands, Westward Ho! and the other northern Devon locations. Further to this, the northern Devon locations were frequently reported as crowded or overcrowded in our survey results, indicating the popularity of these beaches for surfing.

7.4.7 A working figure of 14% of all UK surf trips being to northern Devon is therefore derived.

7.4.8 The British Surfing Association estimates there are around 300,000 people who surf on a regular basis in the UK[35]. This figure does not include the significant number of irregular or infrequent surfers, nor does it include foreign visitors who surf in the UK. Both of these groups contribute to the 'surf economy', and thus the BSA figure can be considered a low estimate.

7.4.9 Based on the proportion of 14% of these surfers frequenting northern Devon (as identified above) we can estimate that around 42,000 surfers visit northern Devon per year.

7.4.10 It should also be noted that many of these people will visit more than once through the year.

7.5 ***Businesses Servicing the Surfing industry***

7.5.1 A full list of businesses in northern Devon was produced by Devon Renaissance. The TRISURF project leader, drawing on his intimate knowledge of the local surf economy, identified from this list 43 businesses that were specifically related to the surfing industry.

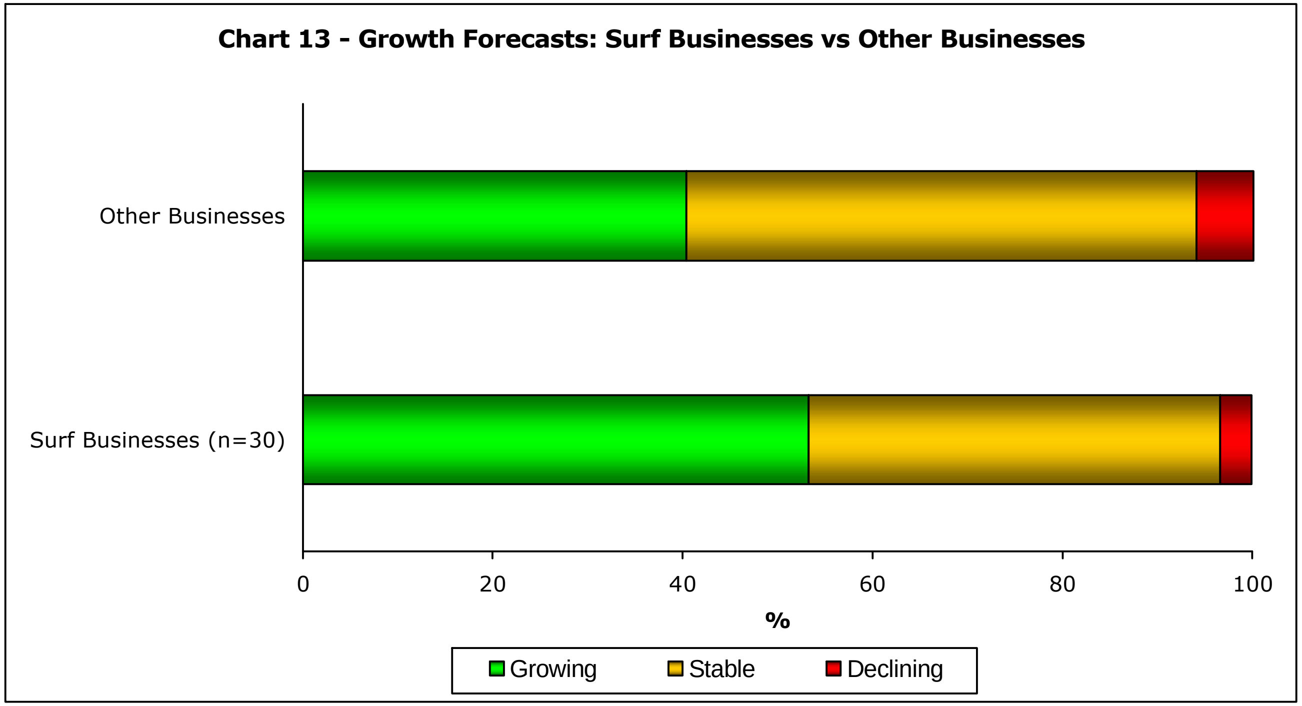
7.5.2 The breakdown of these businesses by Standard Industry Classification (SIC) 2003 tertiary code) is given in table 27 below.

SIC Tertiary Code	Number of Businesses
Retail sale of sports goods, games and toys, stamps and coins	16
Other sporting activities	16
Not classified	4
Retail sale of clothing	2
Wholesale of clothing and footwear	1
Retail sale via mail order house	1
Other recreational activities not elsewhere classified	1
Manufacture of other outerwear	1
Activities of travel agencies	1
Grand Total	43

Table 27 - Surf-Related Businesses in northern Devon by SIC Tertiary Code

7.5.3 For 30 of these businesses, we were able to source Oxford Economic Forecasting (OEF) growth data[36], as shown in chart 13.

[35] *Surfer Survey*, British Surfing Association, 2007.
[36] OEF growth forecasting is a widely used predictive economic modelling tool



7.5.4 What we can see clearly here is that, in relative terms, the surf related businesses are more likely to be growing than other local businesses, with only 47% predicted as being stable or in decline in the next year, against 60% for the remainder of the northern Devon business stock.

7.5.5 In spite of the very small sample size, the indications are that the health of surfing related businesses is good, and this is backed by the ongoing and increasing popularity of surfing as both a lifestyle and a sport.

8 The Economic Value of Surfing in Northern Devon

8.1.1 The approach that has been taken throughout this report has been cautious with a policy of conservative estimates in order to minimise the risk of overstating the value of the surfing economy in northern Devon

8.1.2 From the literature we found that the coastal northern Devon tourism economy was valued at £72m and supported the employment of 2,064 people.

8.1.3 We also found that in the region of 42,000 people surfed in northern Devon annually.

8.1.4 From the Combined Economic Survey, we found that the average annual surfing-related expenditure in the area for northern Devon residents was £1,358 and for those resident elsewhere, £1,121.

8.1.5 Due to the lack of reliable information on the subject, we have not been able to ascertain the relative proportions of local to non-local surfers and so the mean of the two values is selected on which to base onward calculations of total spend, as £1,240.

8.1.6 If each of the 42,000 surfers spend the average annual amount of £1,240, this gives a total annual value of £52.1m of surf-related income to the northern Devon economy.

8.1.7 This is in line what is considered to be the very conservative £64m estimate of the value of surfing to the Cornish economy.

8.1.8 As the total northern Devon coastal tourism economy is estimated at £72m, this represents 72% of this figure. However, this result should be treated with considerable caution, as the scarcity of information, and the tendency towards low estimates, suggest that the total figure is likely to be a dramatic underestimate of the true value of the coastal tourism industry.

8.1.9 On a simplistic *pro rata* basis, it would also equate to supporting 1,470 jobs in northern Devon through direct and induced effects.

9 Conclusions

9.1 The local authority districts of Torridge and North Devon rely heavily on tourism as a key economic driver.

9.2 Tourism generates £411m for their economies and employs 16% of the workforce, with tourism businesses around 4 times more prevalent in the area than nationally.

9.3 From this study it has been possible to identify a conservative figure of £52.1m of surfing-related income, representing 12.5% of the tourism figure.

9.4 Surfing therefore should not be ignored as a marginal activity, but given the regard worthy of an important driver of the local tourism economy and in turn the wider economy.

9.5 Given the environmental incentive to reduce air miles, the current world market instability making foreign travel less affordable, and the positive ratings of visitors to northern Devon, there is also an opportunity to expand the surfing industry of the area.

9.6 As the surfing businesses in the area appear to be performing comparatively well, the time is ripe to bolster this sector and maximise the effect of a booming element of a weak local economy.

9.7 There is a note of caution to this, however, as unbridled growth can have a negative impact on traditional markets and/or the character of the area. Examples of this exist in other parts of the region, notably (and arguably) Newquay.

9.8 The factors that affect destination decisions play to the strengths of northern Devon, as factors that cannot be influenced locally (such as climate) were rarely mentioned, and the critical factors of quality of surf, proximity and access, cleanliness and facilities are all either already in existence or can be achieved relatively easily.

9.9 Visitors in the surveys tended to spend significantly less on visits to northern Devon than on surfing visits elsewhere. Whilst this may be due in part to the likelihood that surfing in other locations is as part of part of a larger more expensive holiday, they typically rate northern Devon more positively as a destination. Linking this to the current economic and social climate, there is an opportunity to attract more surfers to make northern Devon their main annual holiday destination.

9.10 Different socio-demographic groups of surfers have been identified from the survey work, and each group has specific spending habits and priorities. This provides an opportunity to focus on a specific group in developing and marketing surfing and the local economy.

9.11 The young people responding to the schools survey exhibited a very positive attitude to surfing and have made some practical suggestions as to how they could be supported in achieving their surfing related aspirations, particularly through supporting surfing in schools and more surf-related events.

9.12 There is much that can be done now to maximise the potential of the surfing market, but further research is an equally important priority in order to fully understand the nature of the surfing economy.

10 Suggestions for Further Action

10.1 The lack of previous research into this area highlights the need to deepen our understanding of surfing as an economic driver. This study focused on the demand side of the market by considering the spending habits of surfers (from casual irregular surfers and more dedicated frequent surfers).

10.2 It has uncovered some areas where further research would be of great value including:

- More accurate figures for the total number of visitors to coastal northern Devon;
- Figures on the numbers of surfers in northern Devon (both visiting and local);
- A review of the supply side of the surfing industry in northern Devon;
- A review of the induced effects of surfing, including surf-related manufacturing (which supplies areas outside of northern Devon), creative industries, etc; and
- A detailed study of the economic effect of the second homes market as the link between the surfing and this market is established through this work.

10.3 There is an opportunity to build on this research and use it to drive forward economic change. TRISURF are ideally placed to draw together the key agencies (including local authorities, local surfing, tourism and other businesses, community groups and environmental organisations such as the Biosphere) into a partnership which seizes this opportunity through a co-ordinated approach.

THE TRISURF REPORT

Appendix A1

Distribution Details
for
Economic Survey

Appendix A1: Distribution details for Economic Survey

Mail out 1 (1,560 surveys distributed)

Company Name	Post Town	County/UA/MA	Quantity
Filf Clothing Co.Ltd	Brighton	East Sussex	40
Brighton Marina Watersports	Brighton	East Sussex	40
Airhead	Rustington	West Sussex	40
Epic Life	Hastings	East Sussex	40
Wittering Surf Shop	Chichester	West Sussex	40
Worthing Watersports	Worthing	West Sussex	40
Shore Watersports Ltd	Chichester	West Sussex	40
Neptune’s Revenge Surf Shop	Chichester	West Sussex	40
Small planet surf shop	Hove	East Sussex	40
LCB Surf Store		London	40
Ocean Leisure Ltd		London	40
Joss Bay Surf Hire	Broadstairs	Kent	40
Surf 55	King's Lynn	Norfolk	40
East Coast Surf	Norwich	Norfolk	40
Fluid Concept	Scarborough	North Yorkshire	40
Wipeout	Sheffield	South Yorkshire	40
The Waterboard	Poole	Dorset	40
Bournemouth Surfing Centre	Bournemouth	Dorset	40
Bournemouth Surf	Bournemouth	Dorset	40
Sorted Surf Shops	Bournemouth	Dorset	40
Oceanos Surf Shop	Poole	Dorset	40
Bournemouth Surf School Ltd	Bournemouth	Dorset	40
X-TREME SPORTS	Weston-Super-Mare	Avon	40
Beachshack	Bristol	Avon	40
Surfstore	Stockton-On-Tees	Cleveland	40
Sidmouth Surf Shop	Sidmouth	Devon	40
Hythe Marina Watersports Ltd	Southampton	Hampshire	40
Big Wednesday	Falmouth	Cornwall	40
Harpoon Louie's Surf Shop	Manchester	Lancashire	40
Hi Life Surf Shop	Dorking	Surrey	40
Hot Rocks Surf Shop	Bournemouth	Dorset	40
Non Stop Surf	Nottingham	Nottinghamshire	40
Surfing Life 1	Plymouth	Devon	40
Surfing Life 2	Plymouth	Devon	40
The Wet & Windy Co	Bristol	Avon	40
Urban Surfer	Exeter	Devon	40
Wave Games	Taunton	Somerset	40
Boardwise	Chiswick	London	40
Boardwise	Cannock	Staffordshire	40

Mail out 2 (850 surveys distributed)

Company Name	Post Town	County	Quantity
Freespirit Basingstoke	Basingstoke	Hampshire	20
Freespirit Bath	Bath	Avon	20
Freespirit Birmingham		Birmingham	20
Freespirit Bournemouth	Bournemouth	Dorset	20
Freespirit Brighton	Brighton	East Sussex	25
Freespirit Bristol	Bristol	Avon	25
Freespirit Cheltenham	Cheltenham	Gloucestershire	25
Freespirit Exeter	Exeter	Devon	25
Freespirit Kingston Upon Thames		London	25
Freespirit Manchester		Manchester	25
Freespirit Northampton	Northampton	Northamptonshire	25
Freespirit Nottingham	Nottingham	Nottinghamshire	25
Freespirit Oxford	Oxford	Oxfordshire	25
Freespirit Plymouth	Plymouth	Devon	25
Freespirit Poole	Poole	Dorset	25
Freespirit Solihull	Solihull	West Midlands	25
Freespirit Southampton	Southampton	Hampshire	25
Animal Store	Barnstaple	Devon	25
Harbour Sports	Exeter	Devon	25
Harbour Sports	Paignton	Devon	25
Harbour Sports	Plymouth	Devon	25
Animal Store	Exeter	Devon	25
Genesis Surf Shop	Ilfracombe	Devon	25
He'e Nalu	Aylesbury	Buckinghamshire	25
The British Surfing Association	Newquay	Cornwall	30
Plymouth Tourist Information Centre	Plymouth	Devon	30
Yeovil Tourist Information Centre	Yeovil	Somerset	30
Swindon Tourist Information Centre	Swindon	Wiltshire	30
Somerset Visitor Centre	Axbridge	Somerset	30
Tourist Information Centre	Weston-super-Mare	Avon	30
Honiton Tourist Information Centre	Honiton	Devon	30
Taunton Tourist Information Centre	Taunton	Somerset	30
Bristol Tourist Information Centre	Thornbury	Bristol	30

Mail out 3 (500 surveys distributed)

Visitor Information Centre	Post Town	County	Quantity
Civic Centre	Exeter	Devon	20
Town Hall	Bedford	Bedfordshire	20
The Library	Taunton	Somerset	20
Town Hall	Thornbury	Bristol	20
The Rotunda	Birmingham	West Midlands	20
Hall Place	Bexley	Greater London	20
1, Regent Street	London	Greater London	20
Croydon Clocktower	Croydon	Greater London	20
Pepys House	Greenwhich	Greater London	20
Civic Centre	Harrow	Greater London	20
Central Library	Uxbridge	Greater London	20
The Treaty Centre	Hounslow	Greater London	20
Market House	Kinston Upon Thames	Greater London	20
Leicester Square	London	Greater London	20
Lewisham Library Building	Lewisham	Greater London	20
Old Town Hall	Richmond Upon Thames	Greater London	20
Level 2 Information Desk, Tate Modern	Southwark	Greater London	20
London Road	Swanley	Greater London	20
The Atruim	Twickenham	Greater London	20
3-5 The Barbican	Plymouth	Devon	20
Henford	Yeovil	Somerset	20
37 Regent Street	Swindon	Wiltshire	20
Sedgemoor Services M5 South	Axbridge	Somerset	20
Beach Lawns Beach Road	Weston-super-Mare	Somerset	20
Dowell Street	Honiton	Devon	20

Hand delivered (1530 surveys distributed)

Company Name	Location	County	Quantity
Ilfracombe VIC	Ilfracombe	Devon	80
Barnstaple VIC	Barnstaple	Devon	40
Barnstaple Museum	Barnstaple	Devon	40
Bideford VIC	Bideford	Devon	40
Braunton VIC	Braunton	Devon	80
Combe Martin VIC	Combe Martin	Devon	80
Atlantic Village	Bideford	Devon	60
Holsworthy Hall	Holsworthy	Devon	80
Torrington VIC	Torrington	Devon	40
South Molton VIC	South Molton	Devon	40
Milky Way	Bideford	Devon	60
Surfing Croyde Bay	Croyde	Devon	80
Village Store in Croyde	Croyde	Devon	20
Post office, Croyde village	Croyde	Devon	40
Northam Burrows visitor Center	Northam	Devon	40
North Devon Surf School	Bideford	Devon	80
Ruda Holiday Park	Croyde	Devon	120
Lobb Fields Holiday Park	Braunton	Devon	40
Tarka Holiday Park	Barnstaple	Devon	40
Ropes course Big Sheep	Bideford	Devon	40
South West Mountain Board	Bideford	Devon	150
Misc	Misc	Devon	180
Saunton Sands Café	Saunton	Devon	60

THE TRISURF REPORT

Appendix A

Economic Survey

Trisurf Project - Surfing Survey

I hope that there are no **waves!** I never thought I would say that, but it may mean that you take a little time out to fill in this questionnaire. ***TRISURF*** is a community surfing project for young people in Europe. We look at all aspects of surfing, and we look to the future. This questionnaire will highlight the importance of surfing in North Devon, and around the world. This will help projects like ***TRISURF*** secure funding in the future. It will also be combined with social data to work out ways in which we can all continue to enjoy and manage our marine environment. www.trisurf.eu

1. Where do you live?

County ____
Country ____
Postcode ____

Please answer questions 2 – 5 in relation to times when you surf **(for each question please ✓ one option only)**

2. How often do you typically surf or go on a trip where you surf?
(Please ✓ one option only)

Weekly or more frequently	☐	2 – 5 times per year	☐
More than once a month	☐	Once a year	☐
6 – 12 times per year	☐	less frequently	☐

3. When you go, do you go most frequently:
(Please ✓ one option only)

Alone	☐	With a group of adults	☐
With one other adult	☐	In a group including children	☐

4. How long do you typically stay at a time?
(Please ✓ one option only)

Day trip or shorter	☐	One week (7 – 13 days)	☐
Overnight	☐	Fortnight or more (14 days +)	☐
Short break (2 – 6 days)	☐		

5. Have you ever chosen a holiday destination primarily in order to surf?

Yes ☐ No ☐

Please think back to the most recent trips you have made to go surfing in the last 5 years. Please answer questions 6 - 15 in relation to **both** your most recent trip to surf in North Devon, **and** your most recent trip elsewhere where you have surfed. If either one doesn't apply please leave that column blank.

PLEASE USE BOTH COLUMNS

6. Where did you go?
(please ✓ one in each column)

Last surfing trip in North Devon		Last surfing trip elsewhere	
Croyde	☐	Cornwall	☐
Lynton/Lynmouth	☐	South Devon	☐
Saunton	☐	Other SW England	☐
Westward Ho!	☐	Other UK	☐
Woolacombe/Putsborough	☐	Europe (inc Canaries)	☐
Other	☐	Far East/Australia	☐
		Other worldwide	☐

PLEASE USE BOTH COLUMNS

Last surfing trip:	In North Devon	Elsewhere
7. Who did you go with? (please ✓ one in each column)		
Alone	☐	☐
With one other adult	☐	☐
With a group of adults	☐	☐
In a group including children	☐	☐
8. How long did you stay? (please ✓ one in each column)		
Day trip	☐	☐
Overnight	☐	☐
2 – 6 days	☐	☐
7 – 13 days	☐	☐
14 days +	☐	☐
9. Where did you stay? (please ✓ one in each column)		
Own home/second home	☐	☐
With friends/family	☐	☐
Camping/camper van/car	☐	☐
Holiday Park	☐	☐
B&B/Pub	☐	☐
Self catering accommodation	☐	☐
Hotel	☐	☐

TRISURF

Please return the survey using the enclosed Freepost envelope or, if you don't have this, send it to:
Freepost RRKS-SJCG-UXGH, Trisurf NW Devon LEADER+, Unit 5 Caddsdown Industrial Park, Clovelly Road, BIDEFORD, EX39 3DX

This survey has been printed on paper produced from 100% post consumer waste

PTO

Trisurf Project - Surfing Survey

PLEASE USE BOTH COLUMNS

10. Which of these factors were important in selecting your destination?
(please ✓ all that apply in each column)

Last surfing trip:	North Devon	Elsewhere
(A) Quality of surf	☐	☐
(B) Beach facilities/amenities	☐	☐
(C) Cleanliness of the beach	☐	☐
(D) Cost	☐	☐
(E) Culture of the area	☐	☐
(F) Friendliness of the locals	☐	☐
(G) Proximity to home/good access to the beach/resort	☐	☐
(H) The image of the location	☐	☐
(I) Quality of accommodation	☐	☐
(J) Quality of the area's natural setting	☐	☐
(K) Quality of customer care/service	☐	☐
(L) Activities for flat days	☐	☐
(M) Activities for non-surfing group members	☐	☐

(N) Other: please specify North Devon: ______ Elsewhere: ______

11. Of these factors, which was the single most important in selecting your destination? **(please write in the a letter from the list above in each column)**

12. If you could change one thing about the destination, which would it be?
(please write in the appropriate letter from the list above in each column)

13. Overall, how satisfied were you with the location you chose?
(please give a mark out of 5 in each column, where 1 is very dissatisfied and 5 is very satisfied)

14. If you have never visited North Devon, please give the main reason
(please write in a letter from the list above or the letter 'O' for 'any other reason')

PLEASE USE BOTH COLUMNS

15. How much did you spend on each of the following during your trip?
(I don't expect you to know exactly(!), but please give as accurate an estimate as possible in each column)

Last surfing trip:	North Devon	Elsewhere
Accommodation (include travel if purchased as a package)	£	£
Surfing incl. hire (board, wetsuit, clothing, accessories, etc)	£	£
Food & drink	£	£
Travel (airfare, fuel, trainfare, parking, etc)	£	£
Other (souvenirs, art/craft, newsagent, toys/games, etc)	£	£

And finally, please can you provide some general information about you.

16. How old are you?
(Please ✓ one option only)

18 or younger ☐ 19 – 30 ☐ 31 – 45 ☐ 46 – 60 ☐ 61 or older ☐

17. Your gender
(Please ✓ one option only)

Male ☐ Female ☐

18. Employment Status
(Please ✓ one option only)

Work full time ☐ Work part time ☐ Student ☐ Do not work (retired / out of work / homemaker) ☐

19. Annual income
(Please ✓ one option only)

Up to £10,000 ☐ 10,001 - £20,000 ☐ £20,001 - £30,000 ☐ £30,001 - £50,000 ☐ More than £50,000 ☐

20. Prior to receiving this brochure and survey, had you ever heard of www.trisurf.eu?

Yes ☐ No ☐

Thank you for taking the time to complete this survey.

If you would like to be entered into a competition for an exclusive Trisurf prize, please give your name and address below:

Name: ______________________________

Address: ______________________________ Postcode: ______________

We will not use your personal details for any reason other than to send your prize through should you win. We will not pass on your details to any other party nor enter into any further correspondence with you.

THE TRISURF REPORT

Appendix B

Visitor Survey

Surfing – Visitor questionnaire PLEASE ONLY FILL IN IF YOU SURF

Hi, my name is Isabelle. I am an MSc student at Greenwich University. I am conducting research on the surfing industry in North Devon and would be most grateful if you could spare a few minutes of your time to answer this questionnaire. When completed, please hand it back to your accommodation provider.

As a thank you gesture please find attached the latest trans-European surf guide.

Q1. Are you a regular visitor to North Devon?
Yes ☐ No ☐

Q2.How many visits do you make to North Devon in a year?
One☐ 2 to 4☐ 5 to 10☐ 10+☐

Q3.Where did you hear about North Devon as a surf destination? (if internet, which site?)
…………………………………………………………..

Q4.Which months of the year do you surf in North Devon?
Jan ☐ Feb ☐ Mar ☐ April ☐ May ☐ Jun ☐
Jul ☐ Aug ☐ Sep ☐ Oct ☐ Nov ☐ Dec ☐

Q5. Do you check the surf forecast before planning your surfing trip to North Devon?
Yes ☐ No ☐

Q6. Does the surf forecast affect your decision in coming to surf in North Devon?
Yes, I would not travel to North Devon otherwise ☐ No, I would come anyway ☐
I don't check, I just take a chance ☐

Q7. On average, how many nights do you stay in North Devon, PER VISIT?
1☐ 2☐ 3☐ 4☐ 5☐ 6☐ More than 6☐ (how many?)………

Q8.What type of accommodation do you stay in?
Camping ☐ B&B ☐ Own Second Home ☐ Friends & Family ☐ Pub ☐
Self-catering ☐ Hotel ☐ Camper van/Car ☐ Holiday Park ☐

Q9. On average how much do you spend on accommodation PER STAY in North Devon?

£

Q10. Do you own or hire surfing equipment?
Own ☐ Hire ☐

Q11. On this visit to N. Devon, did you take part in surf lessons from a surf school?
Yes ☐ How many? ….. No ☐

Q12. Which of the following did you buy <u>in North Devon</u> and how much on average did you spend on each in the last 12 months?
Surfboard ☐ **£**……. Wetsuit ☐ **£**……. Surfboard Accessories ☐ **£**…
Surf clothing ☐ **£**…….. Surf arts /crafts ☐ **£**…… Others *specify*……… ☐ **£**…

Q11. On this visit to North Devon did you use any of the following? (Tick as many as you want)
Pubs/inn ☐ **£** Chemist ☐ **£** Takeaways ☐ £ Internet café ☐ **£**
Post office ☐ **£** Newsagent ☐ **£** Tea room/cafe ☐ £ Restaurant ☐ **£**
Petrol station ☐ **£** Superstore ☐ **£** Surf Shops ☐ £ Local food store ☐ **£…**
Art/Craft galleries ☐ £

Q11a. Did you use a: Bank ☐ Doctor/ A&E ☐ Dentist ☐ Beach lifeguard ☐

P.T.O

Q12. Which other activities do you take part in, whilst in North Devon? (You can tick more than one box)

Cycling ☐ Walking ☐ Surfing only ☐
Shopping ☐ Visits to tourist attractions ☐ Other ☐ Please specify…………

Q13. Overall, and on average, how much do you spend PER SURFING TRIP in North Devon (excluding accommodation)? £

Q14. On a scale of 1 to 6 how would rate the following whilst visiting North Devon?
(1 = very good, 2=good, 3 =average, 4=bad, 5= very bad, 6=don't know) Please circle 1 rating per question.

Roads leading to the beaches	**1**	**2**	**3**	**4**	**5**	**6**
Beach Parking fees	**1**	**2**	**3**	**4**	**5**	**6**
Beach facilities/amenities	**1**	**2**	**3**	**4**	**5**	**6**
Provision of Sea Water information	**1**	**2**	**3**	**4**	**5**	**6**
Cleanliness of the beach	**1**	**2**	**3**	**4**	**5**	**6**
Quality of your accommodation	**1**	**2**	**3**	**4**	**5**	**6**
Quality of the natural environment	**1**	**2**	**3**	**4**	**5**	**6**
Friendliness of the locals	**1**	**2**	**3**	**4**	**5**	**6**
Quality of customer care/service in general	**1**	**2**	**3**	**4**	**5**	**6**

Q15. How much do you agree with the following statements?
(Please only tick one box per statement).

Statements	**Strongly Agree**	**Agree**	**Disagree**	**Strongly Disagree**	**Don't know**
Whilst visiting North Devon, I try to buy local produce when ever possible.					
I would be prepared to pay extra for environmentally friendly surfboards and wetsuits.					
I always try to car-share when visiting North Devon to surf.					
I consider the quality of the natural environment to be a key factor for me to surf in North Devon.					

Q16. Are you member of any environmental organisations?
Yes ☐ Which one…………………………… No ☐

Q17. Do you normally visit?
Alone ☐ With another adult ☐
Group of adults ☐ With adults and children ☐

Q18. Profession:…………………………..

Q19. How old are you?
18 and under ☐ 19-30 ☐ 31-45 ☐
46-60 ☐ 61 + ☐

Q20. Where do you live?
Country…………………….
County……………………..
Post code…………………..

Q21. Gender: M ☐ F ☐

If there is any other comments you would like to make about surfing in North Devon, please feel free to use the space below. Once again thank you for taking part in this survey.

THE TRISURF REPORT

Appendix C

Second Homes Survey

Second-Home Owner Questionnaire

Hi, my name is Isabelle. I am in the process of completing a MSc in Tourism, Conservation and Sustainable Development with Greenwich University. I am conducting research on the surfing industry in North Devon and would be most grateful if you could spare a few minutes of your time to answer this questionnaire. ***The questionnaire does not ask personal questions and the answers will be reported as a whole.***

Q1. Do you live in North Devon?
Yes ☐ No ☐ if no, which County do you live in?.............................

Q2. How many years have you had a second-home in North Devon?
Less than 1 year ☐ 1 to 5 years ☐ 6 to 10 years ☐
11 to 20 years ☐ 21 + years ☐

Q3. Why did you choose North Devon as a location for your second home? ***Only tick a maximum of 2 boxes***
Family or friend live here ☐ Used to come to North Devon on Holidays ☐
Surfing lifestyle ☐ Natural/unspoilt environment ☐
Purely as an investment ☐ Houses are cheaper in North Devon ☐
No particular reason ☐ Other *Please specify*……………….. ☐
Closer than Cornwall ☐

Q4. Which village or town is your second-home located in (or near)?
…………………………………………………………………..

Q5. How much do you agree with the following statements?
(Please only tick one box per statement)

	Strongly Agree	**Agree**	**Neither agree or disagree**	**Disagree**	**Strongly disagree**
I chose to invest in a property in North Devon because it's a popular destination with surfers.					
I feel very much part of the local community when I stay in my second-home.					
I always try to purchase locally sourced produce whenever I stay in my second-home.					
Surfing is having a negative impact on the pristine environment of North Devon					

Q6. Do you surf?
Yes ☐ No ☐

Q7. How old are you?
18 and under ☐ 19-30 ☐ 31-45 ☐
46-60 ☐ 61 + ☐

Q8. Gender?
Male ☐ Female ☐

Thank you for your time. Please feel free to use the other side of this form if you wish to make additional comments.

Please return the questionnaire in the pre-paid envelope provided.

THE TRISURF REPORT

Appendix D

Schools Survey

Secondary School - Student Questionnaire

This was hosted on Pilton Community College website

Secondary School - Student Questionnaire

Hello
Please take a few minutes of your time to answer ALL of the questions below.
This questionnaire has been sent to all secondary schools in North Devon to find out about the importance of surfing to you, and to the local economy.
This survey is being organised by the TRISURF project (some of you may have heard of this project). If not visit www.trisurf.eu for more information. TRISURF is a North Devon community surf project aimed at supporting young surfers.
We are working in partnership with a local university student who is writing a project on surfing in North Devon.
If you are not sure about the answers to some of the questions, please ask a member of staff to help.

ABOUT YOU

1.1 Name of your school/college?..........................

1.2 Gender?
Male ☐ Female ☐

SURFING AS A SPORT

2.1 Have you ever surfed?
Yes ☐ No ☐ if no, please go to **question 3.17**

QUESTIONNAIRE

3.1 How often do you surf?
Rarely (once a year or less) ☐
Sometimes (1 to 10 times a year) ☐
Often (every time there are good waves) ☐

3.2 How long have you been surfing?
Under 1 year ☐ 1 to 3 years☐ 4 to 6 years☐ 7 to 10 years ☐

3.3 How many surfboards do you own?
0☐ 1☐ 2☐ 3☐ 4+☐

3.4 Do you buy your surfboards in North Devon?
Yes ☐ which supplier?.................. No ☐ where from?.................. Sometimes ☐

3.5 Do you buy your surfboards new or second hand? (You can tick more than one box).
New ☐ Second-hand ☐ Get them from sponsor ☐ **which sponsor?................**
Both ☐

3.6On average, how much per year do you and your parents spend on a surfboard (s) for you only?
£0 - £9 ☐
£10 - £50 ☐
£51 - £100 ☐
£101 - £200 ☐
£201 - £300 ☐
£300 and more☐

3.7 How many wetsuits do you own?
0 ☐ 1 ☐ 2 ☐ 3 ☐ **4**☐

3.8 Do you buy your wetsuits in North Devon?
Yes ☐ which supplier?.................. No ☐ where from?.................. Sometimes ☐

3.8 Do you buy your wetsuits new or second hand? (you can tick more than one box)
New ☐ Second-hand ☐ Get them from sponsor ☐ **which sponsor?................**

3.9 How often do you buy a WINTER wetsuit?
0 ☐ per year
1 ☐ per year
2 ☐ per year
1 ☐ every 2 years

3.9 How often do you buy a SUMMER wetsuit?
0 ☐ per year
1 ☐ per year
2 ☐ per year
1 ☐ every 2 years

3.10 On average, how much per year do you and your parents spend on wetsuit(s) for you?
£0 - £9 ☐
£10 - £50 ☐
£51 - £100 ☐
£101 - £200 ☐
£201 - £300 ☐
£300 and more☐

3.11 How much do you think you spend on surfing equipment in a year? (leash, fins, wax, boots, gloves, hats, rash vest, deck grip) DO NOT INCLUDE SURFBOARDS OR WETSUITS
£0 - £9 ☐
£10 - £50 ☐
£51 - £100 ☐
£101 - £200 ☐
£201 - £300 ☐
£300 and more☐

3.12 How much do you think you and your parents, spend on brand clothing (T-shirt, shorts etc...) from SURF SHOPS in a year FOR YOU ONLY?
0 - £9 ☐
£10 - £50 ☐
£51 - £100 ☐
£101 - £200 ☐
£201 - £300 ☐
£300 and more☐
Supplied by Sponsor☐

3.13 Do you know if the water you surf in is polluted?

Yes ☐ No☐ Not bothered ☐

3.14 Would you like to know the water quality?
Yes ☐ No☐ Not bothered ☐

3.15 If a sign advised you that the water was polluted, would you still go surfing?
Yes ☐ No☐ Not bothered ☐

3.16 Do you know about the Surfing Code of Conduct?
Yes ☐ No☐

3.17 Please indicate how strongly you may Agree/Disagree with the following statements?
(Only tick one box per statement)

	Strongly agree	**Agree**	**Disagree**	**Strongly disagree**	**Don't know**
I don't mind surfing amongst holiday makers					
Holidaymakers don't know the code of surfing.					
Holidaymakers respect our environment while here on holidays.					
Local people should not pay for parking at the beach.					
Holidaymakers should have surfing lessons before going surfing.					
Holidaymakers should be able to surf wherever they want.					
Local surfers should not stop non-local surfers from surfing their local surf spot.					
There is too much rubbish on the beaches.					
Beach owners are responsible for removing rubbish from the beach.					
There are not enough recycling facilities on the beaches.					
I can find somewhere not crowded to surf in the summer.					
Local surfers should show more respect for holidaymakers that come and spend their money in the area.					
Surf Hire outlets should remind visitors about the Surfing Code of Conduct before hiring a board.					

When Ifinish my studies, I would like to get a job in surfing.					
I would like to attend a full-time course in surf studies at a college in North Devon					
I would like to go on to study a surf related course at degree level					
I would like to become a professional surfer					

5.1 Can you think of ANY WAY in which young surfers could be better supported in North Devon?

5.2 What is a Biosphere?

5.3 Do you know where the Biosphere is, if so where?

Thank you for your time.