SCOTTISH ENTERPRISE

SAILING TOURISM IN SCOTLAND

February 2010

FINAL REPORT

TOURISM RESOURCES COMPANY
Management Consultancy and Research Services

In Association with
EKOS and The British Marine Federation

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Ms Annemarie Burns
Project Executive
Priority Industry Delivery - West Region
Scottish Enterprise
17/19 Hill Street
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5th February 2010

Dear Ms Burns

SAILING TOURISM IN SCOTLAND

We have pleasure in submitting our final report into the sailing tourism sector in Scotland. The work conducted on the project and the outcomes produced are in line with that requested by your brief, included in our contract and outlined in our proposal of P1455 of 28th May 2009.

We look forward to discussing the content with you in due course.

Again our thanks for giving TRC the opportunity of working on this project.

Yours sincerely

Tourism Resources Company

Sandy Steven
Director

Ref: SS/IM/OB 0775-FR1

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NOTE: FOR DEFINITIONS OF THE SAILING TERMINOLOGIES ADOPTED BY THIS REPORT SEE THE GLOSSARY

i. Scottish Enterprise (SE) commissioned the consultancy team of Tourism Resources Company (TRC) and EKOS economic consultants, with support from the British Marine Federation (BMF), to conduct a study that would fill the knowledge and research gaps surrounding Scotland's sailing tourism[A] sector. The key aim of the study was to:

'Establish the current contribution the sailing tourism sector makes to the Scottish economy and to highlight what potential there is within the sector with investment in new 'product' to grow GVA impact.'

The methodology adopted for the study included: an audit of existing facilities; operator consultations to establish trading / demand levels associated with marinas, harbours, sailing clubs, moorings associations, etc; extensive nationwide consumer research with Scottish resident berth owners and visiting tourist craft; charter hire operators all providing data to allow assessment of current economic impact to be assessed (GVA and employment). Future potential market growth was also assessed and a range and profile of future planned developments considered. This helped identify potential market gaps and allow for an assessment of potential future economic impact that might be generated by the sector.

In conclusion, as requested, the team identified a broad framework for the future development of the sector highlighting issues that need to be addressed to ensure future success is achieved. The findings and conclusions of the study are summarised below.

ii. The following geographic segmentation was used to guide the research programme and present the data gathered.

'GEOGRAPHY' OF THE SECTOR		
Strategic Economic Areas	**Regional Operational Zones (Sailing Grounds)**	**Location**
A – Clyde	1	Clyde Estuary
	2	Solway
B – West	3	Argyll
	4	Ardnamurchan to Gairloch
	5	Outer Hebrides
C – North	6	Gairloch – Helmsdale
	7	Orkney / Shetland
	8	Helmsdale – Peterhead
D – East	9	Peterhead – Fife Ness
	10	Fife Ness – Berwick

Note: For the purposes of the audit Gairloch has been included in the West and Peterhead has been included in the East.

Source: TRC

The 'Areas' reflect the geographies of the main sailing economies in Scotland. The research programme was designed to uncover the current dynamics of the market in each area including; supply; demand; future potential gaps; and current consumer behaviour.

iii. The following tables provide a summary of the current supply of berthing and mooring facilities across Scotland. They include all commercial pontoon berths and moorings, and the private moorings identified by the Crown Estates for the purpose of the audit.

[A] For the purposes of this study SAILING TOURISM is considered to be the activity surrounding leisure power and sail craft that are normally berthed on moorings and berthings in a marine-related environment.

NATIONAL SUPPLY OF BERTHING FACILITIES – 'RESIDENT' HOME PORT BERTHS				
Area	**Pontoons**	**Moorings**	**Totals**	**Proportion of Resident Berths**
Clyde	2,883	1,844	4,727	43%
West	695	2,351	3,046	28%
North	1,531	215	1,746	16%
East	924	475	1,399	13%
TOTALS	**6,033**	**4,885**	**10,918**	**100%**

Source: TRC

NATIONAL SUPPLY OF BERTHING FACILITIES – VISITING BERTHS				
Area	**Pontoons**	**Moorings**	**Totals**	**Proportion of Visitor Berths**
Clyde	450	194	644	38%
West	335	286	621	37%
North	261	9	270	16%
East	143	5	148	9%
TOTALS	**1,189**	**495**	**1,684**	**100%**

Source: TRC

The above tables indicate that there is a total berthing / mooring capacity available across the Country for 12,500 vessels. (The geographic profiling clearly indicates the clustering and concentration of facilities on the Clyde and on the West Coast when compared to the North and East Coasts).

iv. The current demand levels experienced for resident berthing (as reported by operators) are presented below.

DEMAND FOR HOME PORT BERTHS RECORDED ACROSS SCOTLAND (Resident Berths)				
Area	**Pontoons Occupied**	**Moorings Occupied**	**Totals Occupied**	**Average Occupancy on All Resident Pontoons and Moorings(1)**
Clyde	2,625	1,812	4,438	94%
West	632	2,253	2,885	95%
North	1,478	215	1,693	97%
East	924	475	1,399	100%
TOTALS	**5,660**	**4,755**	**10,415**	**95%**

__Note__: (1) weighted average across all types of berthing ***Source***: TRC

The table above indicates there are currently over 10,000 'resident' boats of relevance to this study in Scotland. The Clyde records the most significant levels of demand in the marketplace for 'resident' boats with 43% of total demand hosted by the area.

v. The current sources of demand for resident berthing are detailed below. As can be seen in the table below, ownership by those from outside Scotland is much more significant in the Clyde and West Coast.

NATIONALITY OF BOAT OWNERS ON RESIDENT BERTHS AND MOORINGS		
Area	**Scottish**	**Non-Scottish / Tourist**
Clyde	78.5%	21.5%
West	86.5%	13.6%
North	96.7%	3.2%
East	99.5%	0.5%
Scotland	**86.5%**	**13.5%**

Source: TRC

vi. The current levels of demand from visiting craft are as follows.

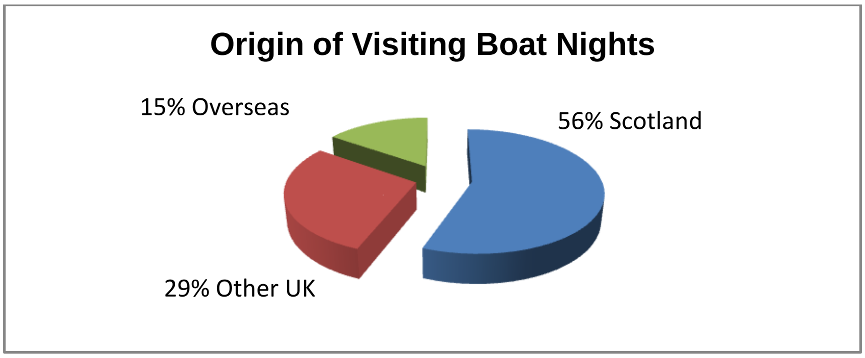
LEVELS OF VISITING CRAFT DEMAND RECORDED ACROSS SCOTLAND						
Area	**Available Berthing Stock (Berths and Moorings)**	**Boat Nights Currently Generated per Berth**	**Formal Visiting Boat Nights**	**Drop the Anchor Boat Nights[(1)]**	**Total Boat Nights Generated**	**Proportion of Total Visiting Boat Nights**
Clyde	644	45	28,752	20,537	49,289	29%
West	621	65	40,496	55,474	95,970	57%
North	270	46	12,471	3,464	15,935	10%
East	148	22	3,229	3,229	6,458	4%
TOTALS	**1,684**		**84,948**	**82,704**	**167,652**	**100%**

Note: [(1)] The visitor survey provided an indication of the ratios between those whilst on trips utilising formal berthing facilities and the number of nights when vessels dropped anchor.
The national ratio is 1:0.97.

Source: TRC

The previous table indicates a significant number of visiting boat nights are generated across Scotland by resident Scottish boats and boats from outside Scotland (tourist boats), totalling more than 167,000 nights. The West is the most significant destination in terms of the 'visiting boat' economy.

vii. The origin of visiting boat nights at a national level is displayed below.



The research indicates that 44% of visiting boat nights are made by boats from outside Scotland, each contributing to the national and remote rural economies. In the Clyde, demand is mainly from Northern Ireland and other parts of the UK and Eire as well as boats resident elsewhere in the Clyde. In the West, demand from visitors is much higher and whilst somewhat similar to the Clyde, profile varies with higher levels of visitors from elsewhere in the UK / Eire and overseas nationalities attracted by the high quality sailing waters. The visitor profile in the North consists of visitors from boats resident elsewhere in the North area as well as a number of European boats from across the North Sea ie Norway, Holland etc. Visiting boat nights in the East (a very small proportion of the overall Scottish level) in the main are generated by boats from within the area with a modest number visiting from outside Scotland when compared to the other areas.

viii. An important key component of the National Study was the consumer survey conducted to inform the appraisal of current market conditions. The consumer survey which targeted resident boat owners, visiting boats and those on 'charter' boats, was circulated in hard copy format at approximately 40 locations across Scotland, as well as being available online, over the summer months.

In total the survey generated 400 responses and provided valuable detailed information on consumer expenditure patterns. Of note, these findings suggest a wide variation in expenditure by boat owners, these variations reflecting mooring types used and geography of the 'home port'. These regional variations have informed the assessment of current and future economic impact of the sector and are presented in the main report.

The more detailed survey findings and responses are available for further assessment if required. Others may seek to mine the data for a range of cross tabulations not utilised or presented in this report.

The consumer research suggests that the main appeal of the sailing product in Scotland is the scenery and the sailing waters therein. The main areas highlighted for improvements are the availability and the quality of visitor berthing.

ix. A summary of the current economic impact of the sector is detailed below.

SUMMARY OF CURRENT IMPACTS AT A SCOTTISH LEVEL (All Sectors)		
Activity	**Total (Activity by Scottish and Non-Scottish Boat Owners)**	**Tourist (Activity by Non-Scottish Boat Owners Only)**
Expenditure	£101.3 million	£27.0 million
Employment (FTEs)	2,732	724
GVA	£53.0 million	£14.0 million

The Sailing Tourism market currently accounts for £101 million of expenditure per year in Scotland and supports a total of just over 2,700 FTE jobs. Non-Scottish boat owners contribute a total of £27 million (27% of the total) and their expenditure supports a total of 724 FTE jobs.

x. An analysis of past and current trading, and trends within the sector has informed an assessment of future latent potential. The past 15 years, prior to the recent recession, seeing the Scottish sailing tourism sector grow at unprecedented levels. New marinas and expansions of existing facilities were developed and absorbed by the market with marinas and other berthing sources 'filling up', and boat ownership in the UK and overseas growing, generating increasing economic activity.

In the UK there is no official, definitive, boat ownership data collated by any organisation. In absence of such data the consultancy team conducted an interrogation of confidential data held by the BMF for this study. (A series of anonymous data was collated geographically by the BMF for the team. This allowed for certain assumptions to be drawn on information that was reflective of what had potentially been the growth in boat ownership in each of the four geographic areas of Scotland over the medium term. This past performance informed the team's assessment of what might potentially be achieved in the future, in each area, assuming issues of supply, service, etc and the current economic climate could be overcome. Analysis of the data provided, indicated that over the last five to 10 years annual growth in the sailing sector in each of the areas could be considered to be at around the following levels.

ESTIMATE OF ANNUAL COMPOUND GROWTH IN 'CORE' MARINA OPERATIONS[a]		
Area	**Over the 10 Year Timeframe (2000 – 2009) [b]**	**Timeframe (2004 – 2009) [c]**
Clyde	6.1%	7.6%
West	7.0%	5.6%
North & East	4.7%	7.0%

Note: [a] Utilising a constant sample of marinas across the timeframe for which information is available.
[b] 10-year period / 9 years of growth.
[c] 6-year period profiling the average growth over the last 5 years.

Source: BMF / TRC

xi. Presented overleaf is the consultant's estimate of potential future levels of demand that could be anticipated to evolve in each area over the five and 10-year timeframe (assuming the economy stabilises and returns to growth).

In each case research currently suggests that the occupancy levels within the existing supply are extremely high, at virtually maximum capacity, with supply and demand in balance in the main, for 'residential' home port berths. Growth for the study and assessment of the future economic impact has been assumed at levels that are commensurate, but less ambitious, than those achieved in the past.

FUTURE GROWTH RATES ASSUMED FOR EACH AREA		
Area	**Growth in Resident Berthing per Annum**	**Growth in Visitor Berthing Per Annum**
Clyde	Assumed 5% on pontoons and commercial moorings; and 1% growth on private / club moorings	The ratio between Resident and Visitor Berths assumed to remain at the same as at present
West	Assumed 3% on pontoons and commercial moorings; and a further growth in the supply of 1% on private / club moorings	The study assumed a 5% growth in the supply / demand for visitor berths
North	Assume 4% growth in demand / supply on total resident boat / facilities	The study assumed a 5% growth in the supply / demand for visitor berths
East	3% anticipated growth on both formal and private moorings	0.5% – Modest growth in visitor boat demand anticipated

Note: It is assumed that to reflect the current economic downturn that there will be a moratorium in the growth of supply / demand in 2010. ***Source:*** TRC

xii. If the future growth rates in strategic infrastructure / demand outlined above are to be achieved, the following levels of infrastructure stock will be required to service any anticipated growth in demand.

FUTURE RESIDENT AND VISITOR BERTHING CAPACITY						
Area	**Future Resident Berthing Capacity**			**Future Visitor Berthing Capacity**		
	5 Years	**10 Years**	**Growth in Berths Required in 10 Years**	**5 Years**	**10 Years**	**Growth in Berths Required in 10 Years**
Clyde	5,550	6,821	2,094	783	1,000	356
West	3,303	3,663	617	755	964	343
North	2,042	2,485	739	328	419	149
East	1,575	1,825	426	151	155	7

Source: TRC

xiii. The potential future 'demand' position within the sector was modelled to inform the assessment of future economic impact that the sector might achieve.

FUTURE DEMAND PROFILE								
	Five Years Out 2014				**Ten Years Out 2019**			
Area	**Resident Berths Occupied**	**% Increase on Current**	**Visiting Boat Nights [a]**	**% Increase on Current**	**Resident Berths Occupied**	**% Increase on Current**	**Visiting Boat Nights**	**% Increase on Current**
Clyde	5,162	17%	59,911	22%	6,344	44%	76,463	55%
West	3,039	8%	107,408	12%	3,370	20%	137,083	43%
North	1,940	17%	18,872	18%	2,360	42%	24,087	51%
East	1,566	12%	6,643	3%	1,804	29%	6,811	5%
TOTAL	**11,706**	**14%**	**192,835**	**15%**	**13,878**	**35%**	244,444	**46%**

Note: [a] Includes Drop Anchor Boat Nights ***Source:*** TRC

xiv. A summary of the impact potentially generated by the increase and growth in the market is provided in the table overleaf. The assessment viewing the position in the five and 10 year time horizon.

The current value of the market is £101 million (27% of which is expenditure from non-Scots) and with development of the market this could potentially increase by £44 million to £145 million (with 29% of total expenditure from non-Scots) after 10 years. A detailed breakdown of the net additional increase can be found in the main body of the report.

SUMMARY OF FUTURE ECONOMIC IMPACT – TOTAL MARKET		
Activity	**Total (Activity by Scottish and Non-Scottish Boat Owners)**	**Tourist (Activity by Non-Scottish Boat Owners Only)**
5 Years (Increase)		
Expenditure	£16.2 million	£5.6 million
Employment (FTEs)	444	152
GVA	£8.6 million	£2.9 million
10 Years (Increase)		
Expenditure	£43.7m	£15.5 million
Employment (FTEs)	1,191	421
GVA	£23.1 million	£8.2 million
5 Years (Current plus increase)		
Expenditure	£117.5 million	£32.5 million
Employment (FTEs)	3,176	876
GVA	£61.6 million	£17.0 million
10 Years (Current plus increase)		
Expenditure	£145.0 million	£42.5 million
Employment (FTEs)	3,923	1,145
GVA	£76.1 million	£22.2 million

xv. The above displays the possible latent potential of the sector if the issues of infrastructure and services required by these new consumers are addressed. However Scotland cannot be viewed as a homogenous sailing destination / economy and the issues affecting each of the main sailing areas and their potential to make an improved contribution to the sailing tourism sector and the national / regional economies of relevance vary dramatically. In order to unlock the potential economic advantages that might be available in future, each area will have to develop its own development strategy that is relevant to its current position and the opportunities available. The various development strategies that are evolved will need to highlight where the relevant responses for infrastructure, services and project delivery are required in the future. In the case of individual projects, prioritisation may also have to take place at some juncture. The basis of that prioritisation will need to be what is deemed appropriate at the time. (Such work has not been carried out in any depth by this study. Appraisal of individual projects will also need to be made prior to development by investors / champions viz their viability, environmental sustainability and contribution to GVA amongst other issues, all assessed at the appropriate time).

Within the main report are provided strategic options for each area.

xvi. In essence, the conclusions of this study are that latent potential exists within the sector. Unlocking that potential calls for a number of issues to be addressed including the level, range and quality of infrastructure for home port boats and visiting boats both by Scottish and tourist-owned boats. These issues need to be addressed and providing the solutions will involve the industry and potentially the public agencies. However, these solutions need to be discussed and agreed. In the main, the findings of the study suggest the issue of supporting infrastructure, services and delivery / implementation of same are key to unlocking the future.

xvii. Conclusions on infrastructure development suggest the focus of future development should be on the Clyde and the West. The aim here is to provide more ‘home port’ residential berthing for Scottish markets and more importantly markets / boat owners from outside Scotland. In the West in particular, an emphasis also needs to be given to the creation of strategic hubs / clusters of berthing to service the visiting markets from outside and inside Scotland.

The aim of this to provide sailing itineraries and enhance the quality of the sailing product at the same time ensuring growth in the economy and distribution of economic benefit to many fragile rural disadvantaged areas.

In the North, the emphasis in the future needs to be on the creation of a 'string of pearls' and visitor nodes to encourage sailing itineraries in the area to attract more foreign boats and provide opportunities and appeal for local craft. Any future development in the East is of less strategic importance as market conditions are primarily influenced by a very local domestic market suggesting less opportunity exists in national strategic terms.

xviii. The table below highlights what could be considered to be the 'relative' strength of opportunity in the different markets that can be attributed to each area of Scotland's sailing tourism economy.

RELATIVE STRENGTH OF FUTURE MARKET / ECONOMIC OPPORTUNITY (Targets and Priorities for the Future)				
Area	**Resident Home Port / Berths**		**Visitor Berthing / Visiting Boat Nights**	
	Scottish Owned Boats / Scottish Markets	**Non-Scottish Owned / Tourist Boats**	**Scottish Boats**	**Non-Scottish Owned / Tourist Boats**
Clyde	High	High	Medium	Medium
West	Medium	Low / Medium	High	High
North	Low / Medium	Low	Low	Medium
East	Low	Low	Low	Low

xix. A Development Framework is identified in the study and discusses the spatial dimension and types of physical infrastructure development it is envisaged is required to address the requirements of the sector in the future. However, an understanding of what is required will not in itself address the issue and 'bring' product to market. This has and always will be a perennial problem. Moving development from aspiration to reality, of itself, needs further consideration by all those with a vested interest in the health and success of the sector in the future. In this respect there are two sides to the equation – that of the industry ie those operators with an interest in the sector's commercial success and the public agencies who want to see the economic contribution of the sector flourish. SE itself is considering the possible elevation of Sailing Tourism to membership of its strategic tourism product portfolio. In parallel the industry itself wants to optimise the commercial advantage it can gain from any future growth in the sector. Both sides are desirous of optimising the future position.

Review suggests that in keeping with current SE thinking surrounding product development, an industry led body not dissimilar to the current Sail Clyde organisation active in the Clyde could provide a model for the future, nationally and regionally, such a group could facilitate taking forward any agreed development strategies for the sector. This requires further discussion.

xx. Competition in the sailing tourism sector is growing nationally at the UK level and across the World and Scotland will need to take action to both maintain its current position in the market and grow its share in the future. Others are developing new product and targeting markets similar to Scotland. This calls for Scotland to both address the potential infrastructure shortfalls in the future but also to proactively target promotion of the destination at those sectors and geographies that offer greatest opportunities in the future.

xxi. The industry and the national agencies responsible for promotion need to consider strategies that will encourage more boats owners from outside Scotland to consider Scotland as their home port and to attract more visiting boats from outside Scotland. These sectors providing the 'additionality' the economy craves and the industry seeks to support its investment.

In conclusion the report suggests opportunities exist in the future for Scotland's sailing tourism sector and it could increase the contribution it makes to the national economy. However investment in the scale and quality of infrastructure and services is required if success is to be achieved. The sector also needs to find ways of channelling and ensuring the gaps in provision are filled and the sector better sells itself into a marketplace where competition is growing. The study highlights the issues and identifies a number of solutions for the future that need to be discussed and agreed by all those active in the sector.

1 BACKGROUND AND INTRODUCTION

1.1 Background, Strategic Context and Aims

Background

Sailing Tourism[1] is a multi-faceted sector and one for which very little official data exists. As a result there is an unsatisfied hunger for information about the sector emanating from many sources. Of these, Scottish Enterprise (SE), who commissioned this study, is just one organisation that wants to fill the knowledge gap.

Strategic Context

SE has an interest in the sailing sector as tourism in general is one of the Agency's 'priority industry' sectors. Within tourism, SE has a focus on six key destinations and a number of strategic 'products' that form its products portfolio, which it seeks to nurture. Sailing Tourism and the economic potential it offers Scotland is now being assessed and the sector viewed as a potential emerging product to join this portfolio. However, little hard data at the national level exists on which to base discussions or decisions on the sector's importance or potential. This study was commissioned by SE to rectify that situation and provide a baseline of the sector and to scale its future potential.

Sailing Tourism has a role to play in contributing to wider strategic objectives including the Government Economic Strategy (GES) and the Tourism Framework for Change (TFFC).

In 2007, the Government published the GES which set out how they will support businesses and individuals. The aim is "to focus the Government and public services on creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth".

The GES identifies a number of key sectors which will expand Scotland's areas of international comparative advantage – one of which is tourism. The aim is to create the right environment for the competitiveness and growth of the key sectors. Scotland has a very good reputation for sailing and therefore it has an important role to play in the tourism sector.

[1]For the purposes of this study SAILING TOURISM is considered to be the activity surrounding leisure power and sail craft that are normally berthed on moorings and berthings in a marine-related environment.

In the GES, one of the key priorities is equity. This includes regional equity and one of the actions is to ensure that the most remote areas of Scotland can contribute to, and benefit from, economic growth. Sailing is location specific and many destinations are in rural and remote rural areas where development opportunities in other sectors may be more limited. In some cases current activity and any future development would be supporting very fragile communities.

The Sailing Tourism sector also has a role to play in contributing to the aims of the TFFC. This includes the aim of developing a culture of enterprise and innovation across the industry to drive continual investment in new products and services that build on Scotland's tourism assets – Scotland's reputation for sailing being one of these. Also access to and around Scotland is seen as being critical in the TFFC and sailing provides access to a large number of rural and remote rural locations.

Aims

This study was contracted and started in June 2009 and continued until November taking account of the important summer sailing season in order to allow wide-ranging consumer and operator research to be carried out.

The key 'aim' of the study was to:

'Establish the current contribution the sailing tourism sector makes to the Scottish economy and to highlight what potential there is within the sector with investment in new 'product' to grow GVA impact.'

Sailing is seen as having a potential key role in economic development and is particularly important in directing to and generating impact in, remote rural areas. The aim of the study was to test and confirm the various assumptions and anecdotal evidence to date that has partially informed the debate surrounding the sector.

The consultants in agreement with the SE project managers agreed an approach and methodology aimed at filling the knowledge gaps. The consultancy research team consisted of: Tourism Resources Company (TRC), who have worked extensively in the tourism and sailing sectors in Scotland; and EKOS economic consultants. This team was also supported by the British Marine Federation (BMF) and their specialists who provided valuable input and data from their own years of tracking the sector.

The attached report will have a very wide audience and it has been prepared to exhibit headline data that will be of interest to the broadest range of readers. Some may seek more detailed information on particular research areas covered by the study and that data can be prepared and interrogated at the appropriate time.

It is understood that there is wide interest in the findings of this study ranging from the Cross-Party Group at Holyrood set up to review the wider marine industry sector through to the many public agencies with a vested interest in the sailing tourism economy. The industry itself also has a close interest and includes a diverse range of commercial and institutional organisations and sole traders.

Note: A number of technical terminologies have been adopted by this study. Please see the Glossary attached as Exhibit I for a detailed description of each.

1.2 Methodology

The team developed a methodology for the project which evolved over the life of the study to ensure all relevant data was captured and the main tasks and outputs delivered. The methodology sought to:

- Provide an overview of current sailing infrastructure in place, supported by information on sailing numbers and an understanding of sailing market trends and forecasts;
- Calculate the current total berthing capacity within Scotland, both permanent and visitor (fixed berth and swing moorings);
- Using this information, quantify the contribution made by the existing sailing infrastructure to overall GVA in Scotland;
- Identify any planned developments of existing or new developments within Scotland that are in the pipeline;
- Identify the growth potential for the sector in Scotland;
- Within the scope of this study identify any gaps in the market which are hindering the development of sailing tourism;

- Quantify the likely economic growth, in terms of GVA and employment / income that would be associated with that growth and the development needed to unlock the potential (including direct, indirect and induced impacts);
- Develop a rational for appraisal and consideration of development projects identified by the study to ensure prioritisation takes cognisance of SE and other agencies aim of maximising GVA impact but within the confines of sustainability in the fullest sense;
- Estimate market trends and forecast at what level of berthing capacity market saturation could occur, and any opportunities for other forms of development / events / or impacts in subsidiary sectors or other business sectors; and
- Assess the implications for SE / HIE's investment priorities in the context of the challenges as set out in the Government's Economic Strategy.

During the study a number of specific detailed steps and stages of work were undertaken including consumer surveys. In total 170 in-depth interviews with those active in the sector also informed the study. The work undertaken included:

- Reviewing existing data, documentation and reports on the sector that are within the public realm and in the consultants' possession;
- Conducting detailed discussions with the operators of existing facilities eg marinas, harbours, etc. to assess the current level and profile of demand (See Operator Survey – Interview Aide Memoire in the Appendices);
- Conducting a 'nationwide' survey of consumers to assess, scope and profile demand as well as behaviour and expenditure patterns amongst:
  - Resident boat owners (See Consumer Survey copy in the Appendices);
  - Visiting boat owners (See Consumer Survey);
  - Potential visiting / resident boat owners (See Non-Scottish Marina Consumer Survey in the Appendices);
- Discussions were also held with relevant Intermediaries / Boat Charter Companies, (See Charter Hire Aide Memoire in the Appendices);
- Research and consultations with Council Planning Departments and operators to establish new development projects in the planning process / under consideration (See Consultations Database in the Appendices);

- Consultation with other relevant sources / agencies, etc. eg Crown Estates (moorings and seabed management) etc;
- Research and consultation amongst intermediaries and others of relevance eg yacht clubs, sailing groups and associations, training providers, etc;
- Review of trends in demand involving consultations and review of data;
- Establishing the range and profile of future development needed to fill infrastructure gaps and help attract and service future anticipated levels of demand, given a return to a stable economy and growth in the sector;
- Assessment and modelling of current and potential future demand levels and profile to provide and inform economic impact assessments of both baseline and potential future position.

The study methodology evolved over time. This was required to ensure all aspects of the study were addressed with sufficient rigour to produce robust outcomes to allow for informed decision-making.

Should the reader need more detail on the study methodology this can be gleaned from the original proposal documents.

1.3 This Report

Attached are the findings, conclusions and recommendations from the study. These have been assembled into a 'package' of data / information that fills the key 'knowledge gaps' the study was designed to fill. That said, such has been the level of data gathered during the study that not all is presented in this document. The data attached are the headline findings.

A complex and diverse mix of detail now exists and is held on file by the research team covering everything from consumer behaviour to detailed audits of infrastructure supply and new development proposals. This rich data source will undoubtedly prove useful to others in the future and can be mined as appropriate at the time.

The attached report presented has been kept fairly brief, reporting the headline issues and statistics that will allow the agencies and others in the private sector to make informed strategic decisions on their respective strategies and activities. (Terminologies used in this report are explained in Exhibit I, the Glossary).

The study identifies the current supply and demand dynamics of the sector and goes on to profile ‘opportunities’ for Scotland in the wider sailing tourism economy. Estimates of the scale of future economic benefit that could accrue to the Nation if this latent market potential was to be unlocked by providing additional infrastructure and services in the future have also been made. These projects and the sector’s future contribution to the Scottish economy are identified in later pages. The report takes a spatial and geographic approach to its reporting by presenting the findings and conclusions at a Scottish and individual regional level (this is discussed in more detail later).

2 CURRENT MARKET OVERVIEW

2.1 Geography of the Marketplace – An Overview

This study is a review of the 'national' sailing tourism sector in Scotland ie it seeks to report on the scale and profile of the sector at the Scottish level. That said, as in all facets of life, the devil is in the detail and it is the different areas / sailing environments that come together to form the national picture and where insight into issues, markets and potential can be truly revealing. To this end, the decision was made early on to segment the Scottish marketplace into a number of separate 'sailing' economies / marketplaces. This was done to allow for more meaningful research, reporting and market and economic modelling to be completed.

The following geographic segmentation was agreed upon:

Table 1

'GEOGRAPHY' OF THE SECTOR		
Strategic Economic Areas	**Regional Operational Zones (Sailing Grounds)**	**Location**
A – Clyde	1	Clyde Estuary
	2	Solway
B – West	3	Argyll
	4	Ardnamurchan to Gairloch
	5	Outer Hebrides
C – North	6	Gairloch – Helmsdale
	7	Orkney / Shetland
	8	Helmsdale – Peterhead
D – East	9	Peterhead – Fife Ness
	10	Fife Ness – Berwick

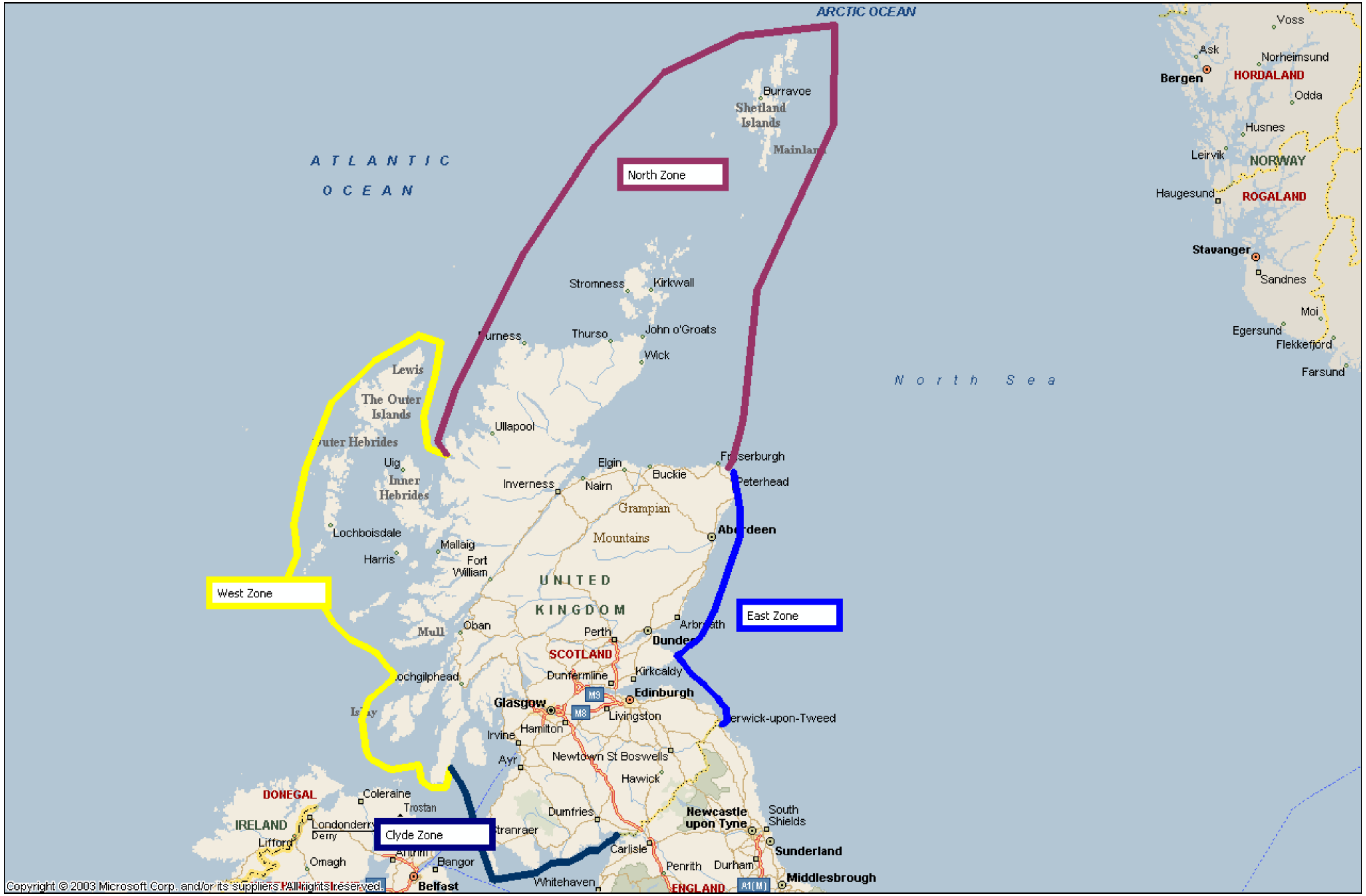
Note: For the purposes of the audit Gairloch has been included in the West and Peterhead has been included in the East.

Source: TRC

The Country was divided into four main areas or economic blocks and 10 individual 'Zones of Activity' to help guide research methodologies, future thinking and recommendations re development. The 'Areas' considered to reflect the geography of the main 'sub national' sailing economies in Scotland. The Zones reflecting the geographies of the different 'sailing grounds' that act as 'regional' / more localised sailing products that have an influence on consumer and visitor behaviour. (These also reflect sailing times / short break radii / cruising itineraries etc).

The map overleaf profiles the four economic areas as detailed above.

SCOTTISH NATIONAL SURVEY – SAILING ZONES



Within each of the zones there are what are termed: ‘sail from’, ’sail to’ and ‘sail through’ destinations and facilities of different size, scale and mix. Expressed another way these destinations are facilities that are the main ‘home ports’ for boat owners alongside others that whilst may be home ports for smaller numbers of resident boats are also destinations that provide important facilities for those on day trips or sailing trips / holiday itineraries. These locations offering stop-over or stop en route to those travelling elsewhere as part of a wider itinerary.

The research programme was designed to uncover the current dynamics of the market in each area. The findings classified as geographic the datasets re supply, demand alongside potential gaps in supply if opportunities are to be unlocked in future. Current consumer behaviour within each zone was also plotted and informed the debate.

2.2 Supply of Infrastructure

Presented overleaf in abbreviated format is a summary of the current supply of berthing and mooring facilities in Scotland. These include:

- Commercial pontoon berths and moorings (available as ‘home port’ resident berths or as moorings for visiting craft);
- Other pontoon berths and moorings in harbours, landing slips, etc;
- Private swing moorings – individual and association / trust owned.

The database of ‘supply’ has been built up from in-depth research utilising various information sources and involving discussions with: the Crown Estates – who manage the seabed; marina / harbour operators across the Country; sailing clubs and associations; harbour / community trusts; as well as other sources as relevant.

Table 2

NATIONAL SUPPLY OF BERTHING FACILITIES – RESIDENT HOME PORT BERTHS				
Area	**Pontoons**	**Moorings**	**Totals**	**Proportion of Resident Berths**
Clyde	2,883	1,844	4,727	43%
West	695	2,351	3,046	28%
North	1,531	215	1,746	16%
East	924	475	1,399	13%
TOTALS	**6,033**	**4,885**	**10,918**	**100%**

Source: TRC

Table 3

NATIONAL SUPPLY OF BERTHING FACILITIES – VISITING BERTHS				
Area	**Pontoons**	**Moorings**	**Totals**	**Proportion of Visitor Berths**
Clyde	450	194	644	38%
West	335	286	621	37%
North	261	9	270	16%
East	143	5	148	9%
TOTALS	**1,189**	**495**	**1,684**	**100%**

Source: TRC

Table 4

NATIONAL SUPPLY OF BERTHING FACILITIES – ALL TYPES				
Area	**Pontoons**	**Moorings**	**Totals**	**Proportion of Total Available Berthing**
Clyde	3,333	2,038	5,371	43%
West	1,030	2,637	3,667	29%
North	1,792	224	2,016	16%
East	1,067	480	1,547	12%
TOTALS	**7,222**	**5,380**	**12,602**	**100%**

Source: TRC

The above provides an indication of the 'scale' and make up of the berthing / mooring infrastructure available in Scotland and in each of the main economies. There is a total berthing / mooring capacity available across the Country for a significant 12,500 vessels (this includes home port / resident berths and berths for visiting craft). As might be expected the geographic profiling clearly indicates the clustering and concentration of facilities on the Clyde and on the West Coast confirming the anecdotal evidence that has always highlighted the importance sailing has on the economy of these specific parts of Scotland when compared to the much less active environment of the East Coast.

The audit of supply subsequently formed the basis of the research into demand for facilities in Scotland which in turn allowed the team to calculate the economic baseline of the sector. Using the supply base also allowed the team to assess the level of boat ownership in Scotland (see Page 13).

The supply audit involved extensive research utilising various sources of data and new primary research conducted by the team. The full audit has been made available to the study sponsors in electronic format, prepared by our team using Excel software. The database plots the stock nationally by location.

The following section discusses the current level of demand being experienced by these facilities across the Country.

2.3 Current Demand for Facilities

Overview

Having identified the number, scale and mix of available berths and moorings for boats in Scotland, the next step was to estimate the level of its activity in the Scottish sailing tourism economy. The team set out to assess the level and make up of boat ownership in Scotland (boats resident on Scottish berths) and the number of visiting boat nights made in Scottish waters by Resident Scottish Boats and Boats from outside Scotland (for the purposes of this study called Tourist Boats).

Vessels are either 'resident' boats moored in Scotland permanently (ie Scotland is the home port) or those visiting Scottish waters on a holiday cruise etc. Estimates of resident boats were made by establishing the occupancy of existing berths and nationality / place of residence of owner by consultation with operators of facilities. Likewise an assessment of the scale and profile of the visitor market was made from similar consultations. (Data was gathered by the team from new consultations as well as building on recent work conducted in the Western Highlands earlier this year). This saw the consultants hold in-depth conversations with a representative sample of operators of marinas, harbours, community trusts, moorings associations, etc.

This research (see aide memoire attached in the Appendices) involved assessing the occupancy achieved by each operator of their facilities.

The questionnaire was designed to establish the mix and profile of boat owners utilising permanent berths as resident boat owners through to gathering valuable data on the nationality mix etc of visiting craft, their length of stay and visiting boat nights generated in each location[3] (this level of data required to ensure our quantification of economic impact of the sector was informed and robust).

Here again all the data has been captured and stored by the consultants and is available for further interrogation. For the purposes of this initial study the findings of these discussions and other data gained from the consumer survey have allowed a range of headline tables to be prepared.

In each case the illustrations presented overleaf demonstrate:

- The scale of demand for ‘resident’ berths – itself providing an estimate of the number of boats berthed in Scotland;
- The nationality mix of boat owners whose ‘home port’ is Scotland;
- The supply of berths available to visiting / cruising vessels and the levels of demand (boat nights) experienced by suppliers for same indicating the boat night demand generated by each visitor berth.

The datasets provided have been prepared from confidential returns / discussions the consultancy team had with the many cooperative individuals and organisations across Scotland’s sailing sector. These individuals generously gave of their time to discuss their operations and provide trading / operating data that allowed this national sailing study to be completed. The consultants’ thanks go to the many individuals involved.

The current demand profile at the national level displayed overleaf was achieved by amalgamating the regional findings. The headline findings on demand, regionally and nationally, display the following characteristics.

[3] The study did not set out to assess the ‘number’ of actual boats visiting Scottish waters as this is an impossible task. The criteria used to inform the economic assessment of visiting boat activity was calculating the number of ‘boat nights’ recorded by operators of marinas, ports, and harbours, etc. Visiting nights are made by Scottish resident boats and boats entering Scottish waters from outside.

Resident Boats – Demand Profile

Table 5

DEMAND FOR HOME PORT BERTHS RECORDED ACROSS SCOTLAND (Resident Berths)				
Area	**Pontoons Occupied**	**Moorings Occupied**	**Totals Occupied**	**Average Occupancy on All Resident Pontoons and Moorings[(a)]**
Clyde	2,625	1,812	4,438	94%
West	632	2,253	2,885	95%
North	1,478	215	1,693	97%
East	924	475	1,399	100%
TOTALS	**5,660**	**4,755**	**10,415**	**95%**

Note: [(a)] weighted average across all types of berthing *Source*: TRC

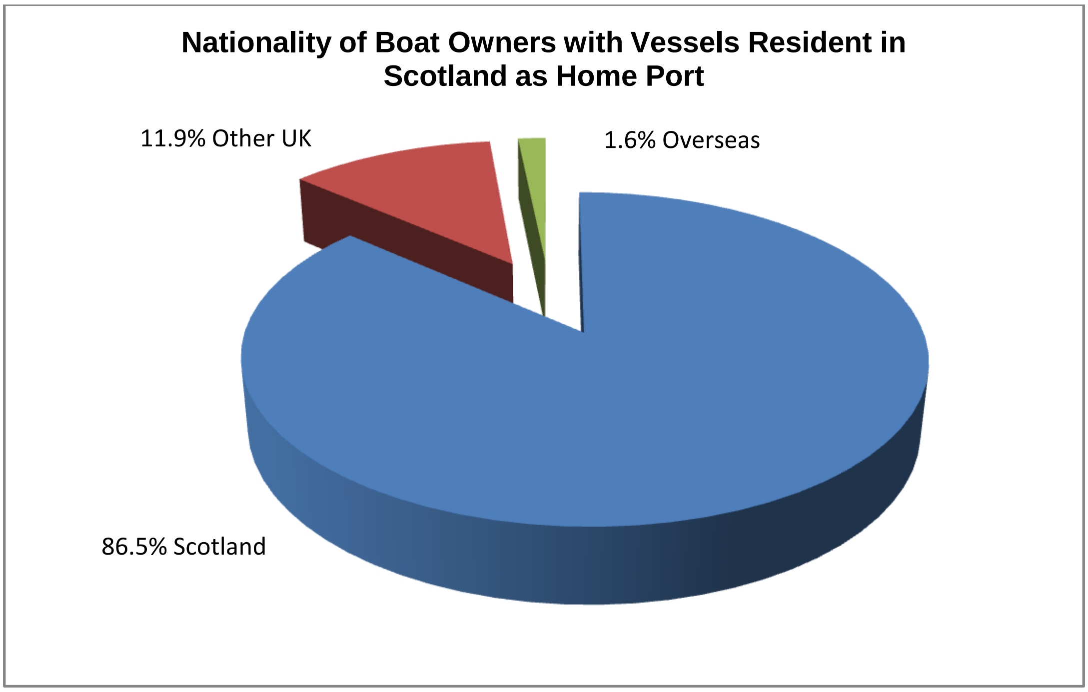
The table above suggests there are currently over 10,000 'resident' boats of relevance to this study in Scotland – a significant number. Of these research indicates 14% of the total across all of Scotland are owned by individuals who are resident outside of Scotland.

(These figures suggest that only around 0.16% of the Scottish population own boats moored in Scotland suggesting there are still opportunities for growth in ownership).

Table 6

NATIONALITY OF BOAT OWNERS ON RESIDENT BERTHS AND MOORINGS		
Area	**Scottish**	**Non-Scottish / Tourist**
Clyde	78.5%	21.5%
West	86.5%	13.6%
North	96.7%	3.2%
East	99.5%	0.5%
Scotland	**86.5%**	**13.5%**

When viewed at a regional level, ownership by those from outside Scotland is much more significant in the Clyde and West. It is considered this can be put down to a number of factors not least the attraction of the sailing environment; the range of facilities; scenery and proximity / access to population centres. A recent phenomenon being the non-Scottish resident with a boat in Ayrshire attracted by the good air links with the South. This external ownership generating economic additionality at a Scottish level (see Section 3).



Visiting Boats – Demand Profile

When the number of 'visitor boat nights' at visitor moorings available across the Country are observed, again it can be seen that a good percentage is generated by those from outside Scotland, reflecting the appeal of the destination.

The tables overleaf provide a 'scaling' of the level of visiting boat night demand across Scotland. The formal boat nights calculated from returns provided by operators and the 'drop anchor' nights calculated as a ratio based on returns made to the consumer survey. This allowed the consultants to make assessment of the number of visiting boat nights generated by 'visitors' not captured by the survey of operators of formal facilities.

The table indicates a significant number of visiting boat nights are generated across Scotland at over 167,000 nights with the research suggesting as much as 44% are made by boats from outside Scotland each contributing to the national and in many cases remote rural economies.

Table 7

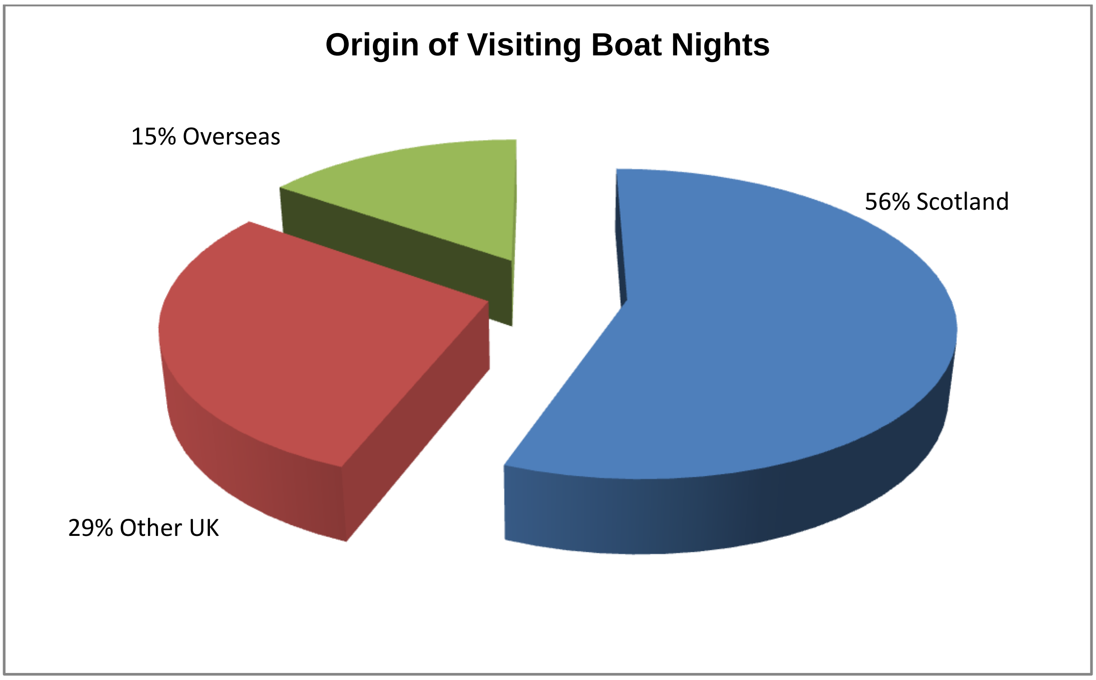
LEVELS OF VISITING CRAFT DEMAND RECORDED ACROSS SCOTLAND						
Area	**Available Berthing Stock (Berths and Moorings)**	**Boat Nights Currently Generated per Berth**	**Formal Visiting Boat Nights**	**Drop the Anchor Boat Nights[(a)]**	**Total Boat Nights Generated**	**Proportion of Total Visiting Boat Nights**
Clyde	644	45	28,752	20,537	49,289	29%
West	621	65	40,496	55,474	95,970	57%
North	270	46	12,471	3,464	15,935	10%
East	148	22	3,229	3,229	6,458	4%
TOTALS	**1,684**		**84,948**	**82,704**	**167,652**	**100%**

Note: [(a)] The visitor survey provided an indication of the ratios between those whilst on trips utilising formal berthing facilities and the number of nights when vessels dropped anchor. The national ratio is 1:0.97.

Source: TRC

As can be seen from the table above the most significant destinations for visiting boats are clearly led by the West with the Clyde the next largest hosting only 50% of that of the West. The North, the next most important attracting around 16,000 boat nights, and the East trailing at around 6,500 boat nights.

The mix of the visiting boat nights generated at the Scottish level is displayed below.



At the area level there are variations in profile.

In the Clyde visiting boat demand from discussions with operators is mainly from Northern Ireland and other parts of the UK and Eire (generating sources mainly in the west of the Country) as well as boats resident elsewhere in the Clyde. In the West demand from visitors is much higher, the profile whilst somewhat similar to the Clyde varies with higher levels of visitors from elsewhere in the UK / Eire and overseas nationalities attracted by the sailing waters. (The West also playing host to a high number of boats visiting from the Clyde).

In the North the visitor profile sees the area playing host to visitors from other parts of the North area as well as a goodly number of European boats from across the North Sea eg Scandinavia etc.

Discussions and returns suggest that visiting boat nights generated in the East (a very small proportion of the overall Scottish level) in the main generated by boats from within the area with a modest number visiting from outside Scotland when compared to other destinations.

2.4 The ‘Charter’ Sector

Within the demand profile for facilities are the ‘charter’ operations of the sailing tourism sector. This sector also growing over the years in tandem with privately owned boats. (Note the economic impact associated with charters is considered here under visiting boats).

There are approximately 230 vessels available in Scottish waters for charter hire. Of these, 200 are estimated to be available for holiday charter hire ie can be hired either with a skipper or without a skipper (bareboat charter) for duration of a set number of nights. The remaining 30 vessels service the day hire market and are principally used for wildlife-related tours and expeditions.

Discussions with operators indicated that the majority of the holiday charter hire vessels are based in the Clyde with around 87 vessels identified by our research. The West Coast has 76 vessels for holiday charter hire and the North and East coasts of Scotland have 31 and three craft respectively. This profile alters somewhat when the day hire market is analysed. The West Coast dominates with 25 vessels, more than 85% of the countries available day-hire stock, reflecting the high opinion of this area's sailing waters and the abundance of available wildlife.

Of the stock identified by the study, approximately 95% of the available holiday charter hire stock is sailing craft.

Research and analysis of findings suggests the fleet of holiday charter stock is hired for approximately 3,000 weeks throughout the year, with the majority of companies consulted normally only operating during the summer months ie April to October. This equates to an estimated 15 full weeks hire per available vessel. Bareboat hire is the preferred mode of hire with over 85% of the market hiring on this basis. However, it is not uncommon for vessels to have a skipper for the first few days of a cruise, this allows the skipper to rate the competency of the crew hiring the vessel thus limiting the chance for accident and damage to the boat.

The average charter hire in Scotland is for seven nights and normally there are six people in each party. Approximately 50% of holiday charter hire vessel demand is from English residents; Scottish residents account for 30% of the demand; and the overseas market drives the remaining 20%. (Demand and economic impact associated with the charter stock is assessed under the visiting boat sector).

2.5 Demand Summary

The above clearly indicates that in the sailing tourism sector demand has to be viewed along the lines of two very different strategic themes. These different sectors of demand are:

- Demand for resident ‘home port’ facilities; and
- Demand for a visiting berth.

The profile and scale of demand from each sector, as demonstrated in the tables above, varying across Scotland. Also, as is demonstrated in the following consumer research and economic impact sections, is the different type and level of economic impact each sector has on Scotland as a whole and in the various sailing destinations.

In terms of ‘resident’ boats the most significant marketplace is that of the Clyde. The Clyde plays host to the greatest proportion of resident boats in Scotland with a significant number owned by Non-Scotland domiciles. Conversely in terms of the ‘visiting boat’ economy the most significant destination is the West. In both these sectors the North performing at much lower levels and the East, the smallest sailing tourism sector in the Country.

In the remainder of this section we comment in broad terms on various other parts of the consumer research findings. In terms of the various boat owners' behaviour / expenditure patterns these findings are in the main reserved for the economic impact sections of the report and are commented upon there.

2.6 Consumer Research – Overview of Findings

As already indicated an important key component of the National Study was the consumer survey conducted to inform the appraisal of current market conditions. The survey sought to plot current consumer behaviour and spending patterns to inform the economic impact assessment. The consumer survey was circulated in hard copy format at around 40 locations across Scotland, as well as being available online, for a three-month period, accessible to resident boat owners, visiting boats and those on 'charter' boats. (A copy of the survey is included in the Appendices).

In total the survey generated in excess of over 400 responses providing valuable detailed information on consumer expenditure patterns on various headline activities and operations. The usable returns provide a standard error of +/- 6.3% on consumer responses.

The expenditure findings from the consumer survey were used to inform and calculate the current economic baseline / activity generated by sailing tourism and in the quantification of future impact. The detailed survey findings and responses are available for further assessment if required in future (others may seek to mine the data for a range of cross tabulations not utilised or presented in this report).

Of note from the expenditure findings, are the wide variations in expenditure by boat owners that are reflective of mooring types used and geography of the 'home port'. Here again these regional variations have informed the assessment of current and future economic impact of the sector. The level of data gathered is significant and has been used to assess regional average expenditure for the purposes of calculating current and future economic impact. (See Section 3)

In addition to monitoring expenditure patterns the consumer research was used as an opportunity to monitor boat owners / trip behaviour patterns and views of the sector. This provides data on:

- Trips made by owners using their boats, the locations visited and their expenditure patterns on trips;

- Reasons / factors influencing the choice of Scotland as a visitor destination for a sailing holiday as well as understanding what the wider market consider to be Scotland's strengths and weaknesses as a sailing destination when compared to others;
- Shortcomings in the current offering viz infrastructure, services, etc;
- However most importantly the research provides annual expenditure patterns on boat berthing, storage, maintenance, chandlery, etc – providing valuable data for the economic impact appraisals (see Sections 3 and 6).

What is immediately clear from the research is the considerable level of expenditure made by boat owners on their vessels and when using vessels to make trips etc. This expenditure taking many forms from direct expenditure on the vessels re maintenance, repairs, fuel, etc to that on associated activities viz expenditure whilst on trips re food, activities, sport, retail, etc. (See later sections that scale and profile the expenditure across each area).

At the appropriate time all the data gathered can be mined for more detail – these databanks having been prepared by the consultants from the research returns. The findings of the research clearly dispel certain myths surrounding the sector's spending behaviour patterns. The identified levels of expenditure made by boat owners / visitors in the Scottish economy provides evidence of the growing importance of the sector. Expenditure is made by Scottish owners of boats as well as by the growing number of owners who live outside Scotland but have their boat permanently berthed in Scotland, this activity added to by people who are visiting Scottish waters as part of a holiday / cruise. All this activity providing economic benefit at a national level but is of particular importance to many fragile remote rural economies. These economies / locations providing berthing and land-based services ie restaurants, bars, shops, activities, attractions and sporting opportunities to visiting boats.

Headline expenditure patterns assumed by the study from the data gathered is used to calculate the economic impact of the sector (see Section 3). There is a wide variation in the different expenditure points by boat owners principally in respect of direct expenditure on the vessel itself viz moorings, repairs, etc. The responses to the surveys by consumers indicates and confirms that Sailing Tourism is in many ways similar to Scottish tourism's important self-catering sector only the visitor accommodation of choice is mobile and the geography of the spending changes over time.

Participants 'spend' on the accommodation element either as owners or those renting / chartering a boat. Use of the accommodation then spawns expenditure across the wider economy on entertainment, leisure activities, food and beverage, retail, sports, etc.

To answer other research requirements set by the client group, profiled below are some of the key perceptions by the market of the Scottish sailing product.

Table 8

SURVEY RESPONSES TO:
WHAT ARE THE BEST ASPECTS OF SAILING IN SCOTLAND?
(Question 34 in the Consumer Survey)

Sector	Respondents	Scenery	Low Cost	Wildlife	People	Events	Sailing Waters	Onshore Facilities (Pubs, Restaurants, etc)	Not Crowded	Marinas / Moorings
Boats Resident in a Scottish Home Port	212	37%	2%	5%	6%	1%	25%	3%	15%	1%
Visiting Craft (Not including those that have a resident Scottish Home Port)	104	36%	2%	2%	15%	0%	19%	8%	12%	5%
Charter	35	42%	0%	8%	3%	0%	24%	4%	15%	3%

Note: Respondents were not limited to one response. ***Source***: TRC

Table 9

SURVEY RESPONSES TO:
ARE THERE ANY ASPECTS OF SAILING IN SCOTLAND THAT COULD BE IMPROVED?
(Question 35 in the Consumer Survey)

Sector	Respondents	Training (More Undertaken by Current Boat Owners)	Improve and More Facilities (Berthing and Mooring)	Improve and More Onshore Facilities (Pubs, Restaurants, etc)	Cost	Weather and Forecasting	Events	Waters Are Too Crowded	Other
Boats Resident in a Scottish Home Port	154	3%	46%	27%	8%	7%	2%	2%	0%
Visiting Craft (Not including those that have a resident Scottish Home Port)	74	2%	51%	19%	8%	10%	0%	0%	9%
Charter	27	3%	45%	39%	3%	6%	0%	0%	3%

Note: Respondents were not limited to one response. ***Source:*** TRC

The above clearly demonstrates that the overriding main appeal of the sailing product in Scotland is the scenery of its sailing waters – supporting, to an extent, the claim that Scotland offers some of the best sailing waters in the World. In terms of calls for 'improvements' to the offering from those responding to the questionnaire, the main areas are availability and quality of visitor berthing.

Improvements are also suggested in shore side visitor infrastructure. These two issues providing pointers for the future if the sector is to be encouraged to grow and create increased economic activity.

2.7 Conclusion

The previous tables provide headline market conditions and consumer views of the destination. The databank created by the study holds a wide range of other more detailed findings on expenditure patterns by boat owners that has been used in the analysis of the economic impact. At the appropriate time those detailed findings can be interrogated should it be needed. (See Section 3).

3 CURRENT ECONOMIC IMPACT OF THE SECTOR – A BASELINE

3.1 Introduction

This section sets out the current level of economic impact resulting from the sailing tourism market in Scotland. (The scope of the sector includes activities related to the leisure power and sail craft on moorings and berths in marine-related environments. The economic impact makes no attempt to quantify the economic activity surrounding sailing events and other sectors of the marine leisure economy at this time).

The impacts identified below are those generated through both permanent (resident home port boat berths) activity and that from visitor berths and moorings.

The economic analysis provides an assessment of the total value of activity in the sector generated by Scottish residents and tourists (from outwith Scotland)[4]. A separate tourist generated activity is also assessed and presented separately.

The expenditure patterns used by the analysis are those gathered from market research / consumer surveys.

3.2 Current Impact (All Sectors Scottish and Non-Scottish Boats)

3.2.1 Expenditure Generated by Resident Berths and Moorings

Number

The number of resident berths and moorings are given in the table below.

Table 10

RESIDENT (HOME PORT) BERTHS AND MOORINGS		
Area	**Available**	**Occupied**
Clyde	4,727	4,438
West	3,046	2,885
North	1,746	1,693
East	1,399	1,399
Scotland	**10,918**	**10,415**

4 For the purposes of this study a tourist is defined as someone from outside Scotland.

For the purposes of the economic impact assessment we are interested in the number of berths and moorings that are occupied, as they are the ones that have associated expenditure.

Average Expenditure

Analysis of the fees paid for berths and moorings shows that there is considerable variation. This is not only between different types of berths and moorings but also is dependent on location and the facilities that are available. Berths, as the main significant differentiator of owner expenditure has seen us categorise demand levels into a range of expenditure bands: high; medium; and low[5] (as set out in the table below) for the purposes of the economic impact assessment. Within each area and across the high, medium and low categories as well as across the geographic spectrum all the differing 'expenditures' by boat owners vary. In each case 'averages' of the area have been calculated from the consumer returns and used by this analysis.

Table 11

RESIDENT BERTHS AND MOORINGS BY CATEGORY

Area	High	Medium	Low	Total
Clyde	2,506	208	1,724	4,438
West	663	496	1,726	2,885
North	472	581	640	1,693
East	607	649	143	1,399
Scotland	**4,248**	**1,934**	**4,233**	**10,415**

The average expenditure made by boat owners is calculated from the consumer survey and includes expenditure on the upkeep, maintenance, etc of the vessel associated with each category and used by this assessment. This expenditure for each category is shown below. For each we have deducted the proportion that would be spent on trips away so as to avoid double-counting this when assessing visiting boat night expenditure.

Table 12

AVERAGE ANNUAL SPEND PER BOAT BY CATEGORY[(a)]

Area	High	Medium	Low
Clyde	£6,250	£3,650	£3,050
West	£5,550	£3,550	£3,050
North	£3,150	£2,150	£1,850
East	£3,850	£2,450	£1,950

Note: [(a)] Expenditure includes: berthing; fuel; maintenance, repair and chandlery; food and drink aboard; food and drink ashore; accommodation; entertainment; retail; and transport to and from mooring. These figures calculated from survey responses.

[5] The distinction between high, medium and low set on the basis of berth/mooring fees that research indicates consumers are currently paying in each area.

Direct Expenditure

The direct expenditure generated by resident boats on an annual basis is provided below.

Table 13

DIRECT EXPENDITURE (Resident Berths and Moorings)	
Area	**Expenditure**
Clyde	£21,679,900
West	£10,704,750
North	£3,919,950
East	£4,205,850
Scotland	**£40,510,450**

Multipliers

This direct economic activity also has two types of wider impact on the economy:

- supplier effect: an increase in sales in a business will require it to purchase more supplies than it would have otherwise. A proportion of this 'knock-on' effect will benefit suppliers in the Scottish economy; and

- income effect: an increase in sales in a business will usually lead to either an increase in employment or an increase in incomes for those already employed. A proportion of these increased incomes will be re-spent in the Scottish economy.

The STMS[6] provides combined supplier and income multipliers[7].

Table 14

MULTIPLIERS	
Area	**Scottish Level**
Clyde	1.57
West	1.69
North	1.69
East	1.57

6 Scottish Tourism Multiplier Study (1992).

7 There are a mix of rural and remote rural locations in the North and East so we have applied an average between the two for these multipliers.

Total Expenditure

Applying the multipliers to the direct expenditure gives total expenditure as set out below (including direct, indirect and induced expenditure).

Table 15

CURRENT TOTAL EXPENDITURE (Resident Berths and Moorings)	
Area	**Scottish Level**
Clyde	£34,037,443
West	£18,091,028
North	£6,624,716
East	£6,603,185
Scotland	**£65,356,371**

The table above demonstrates the current level of economic impact generated by boats resident in Scotland as their home port.

3.2.2 Expenditure Generated by Visiting Boat Nights

Number and Average Expenditure

The number of visiting boat nights recorded by the research is given below. This includes visitor nights in formal facilities and assessment of those dropping the anchor. Visiting boat nights are generated by Scottish resident boats and visiting tourist boats. (ie boats from outside Scotland).

Table 16

VISITING BOAT NIGHTS	
Area	**Number of Nights**
Clyde	49,289
West	95,970
North	15,935
East	6,458
Scotland	**167,652**

The average expenditure per visitor boat night is estimated at £130 based on the findings of the survey.

The consumer survey provided the headline expenditure patterns made by visiting resident and non-resident boats as displayed in the table overleaf.

Table 17

VISITING BOAT EXPENDITURE[a]			
Boat Origin	**Average Expenditure per Person[b]**	**Average No of People per Vessel**	**Total Spend per Boat Night**
Scottish	£43.75	2.97	£129.94
Non-Scottish	£39.68	3.3	£130.94

Note: [a] From Consumer Survey Research
[b] Expenditure on recreation, retail, food and beverage, activities by each person per 'night'.

This expenditure includes that made by the average boat and its occupants whilst visiting a port of call. This is the average achieved across Scotland from all visiting boats as identified from the consumer survey. Included in the expenditure is berthing; fuel; food and drink aboard; food and drink ashore; accommodation; entertainment; and retail. The 'make up' of boat passengers in considered to change over time. This sees many use their boats for parties of friends who might be 'all-male' for some weekend breaks but at other times for 'family' holidays / weekends.

Direct Expenditure

The direct expenditure currently generated by all visitor boat nights is set out below.

Table 18

CURRENT DIRECT EXPENDITURE (All Visiting Boats)	
Area	**Expenditure**
Clyde	£6,407,589
West	£12,476,096
North	£2,071,572
East	£839,540
Scotland	**£21,794,797**

Total Expenditure

Once again the different multipliers need to be applied which gives total expenditure at the Scottish level.

Table 19

CURRENT TOTAL EXPENDITURE (Visiting Boats)	
Area	**Scottish Level**
Clyde	£10,059,914
West	£21,084,603
North	£3,500,956
East	£1,318,078
Scotland	**£35,963,551**

3.2.3 Total Current Expenditure (Scottish Home Port Residents and Tourists)

The total current expenditure generated by resident (home port) and visitor berths in Scotland's sailing tourism economy is summarised in the table below.

Table 20

TOTAL CURRENT EXPENDITURE (All Sectors)			
Area	**Resident (Home Port) Berths**	**Visitor Berths**	**Total**
Clyde	£34,037,443	£10,059,914	£44,097,357
West	£18,091,028	£21,084,603	£39,175,630
North	£6,624,716	£3,500,956	£10,125,672
East	£6,603,185	£1,318,078	£7,921,262
Total	**£65,356,371**	**£35,963,551**	**£101,319,921**

The above suggests a sector that generates total expenditure in excess of £100 million in Scotland.

3.2.4 Employment

The level of employment that resident and visiting boat expenditure supports can be estimated using output:employment ratios. We have used the output:employment ratios from the STMS, as follows:

- Rural (Clyde and East): £34,650; and
- Rural / Remote Rural[8] (West and North): Scottish £40,050.

Applying these gives employment impacts as set out below.

Table 21

CURRENT EMPLOYMENT NUMBERS	
Area	**Scottish Level**
Clyde	1,273
West	978
North	253
East	229
Scotland	**2,732**

[8] There are a mix of rural and remote rural areas in the West and North so we have used an average for these areas

These figures reflecting jobs directly related to the sailing tourism sector and across the wider economy.

3.2.5 Gross Value Added

Gross value added (GVA) has been estimated on the basis of GVA per employee (of £19,400[9]). This gives GVA as set out below in the various areas and in the Scottish market in total.

Table 22

CURRENT GROSS VALUE ADDED	
Area	**Scottish Level**
Clyde	£24,689,429
West	£18,976,460
North	£4,904,820
East	£4,434,992
Scotland	**£53,005,702**

3.3 Current Tourist Boat Economic Impact – as Generated by Non-Scottish Owned Boats

This section provides a separate analysis of the impact generated by 'tourists' ie non-Scottish owned boats in the Scottish sailing tourism economy.

3.3.1 Resident Berths and Moorings

Number

The number of (occupied) resident berths and moorings that are owned by non-Scottish domiciles is shown in the table below.

Table 23

BERTHS AND MOORINGS (Non-Scottish Owned / Tourist Boats)		
Area	**Proportion Non-Scottish**	**Number**
Clyde	21.5%	956
West	13.6%	391
North	3.2%	55
East	0.5%	7
Scotland	**13.5%**	**1,409**

[9] Scottish Annual Business Statistics 2007.

Once again these berths have been divided into high, medium and low expenditure categories and average spend levels adopted as those set out earlier.

Direct Expenditure

The direct expenditure generated on an annual basis by non-Scottish boat owners with vessels berthed in Scotland is given below.

Table 24

CURRENT DIRECT EXPENDITURE – BERTHS AND MOORINGS (Non-Scottish Owned / Tourist Boats)	
Area	**Expenditure**
Clyde	£5,035,600
West	£1,709,550
North	£156,750
East	£24,150
Scotland	**£6,926,050**

Total Expenditure

Applying the multipliers gives direct, indirect and induced expenditure as set out below.

Table 25

CURRENT TOTAL EXPENDITURE – BERTHS AND MOORINGS (Non-Scottish Owned / Tourist Boats)	
Area	**Scottish Level**
Clyde	£7,905,892
West	£2,889,140
North	£264,908
East	£37,916
Scotland	**£11,097,855**

3.3.2 Visiting Boat Nights (Non-Scottish Owned / Tourist Boats)

Number and Average Expenditure

The number of visiting boat nights generated by non-Scottish (tourist) boats is given overleaf. This includes visitor boat nights in formal facilities and an assessment of those dropping the anchor.

Table 26

CURRENT VISITING BOAT NIGHTS (By Non-Scottish Owned / Tourist Boats)	
Area	**Number of Nights**
Clyde	20,159
West	35,029
North	13,800
East	4,986
Scotland	**73,974**

Direct Expenditure

The average expenditure of £130 per boat night has been again assumed from survey returns (The survey indicating no difference between the boat nights expenditure of Scottish and Non-Scottish boats). Applying this figure gives direct expenditure generated by the tourist boat nights as set out below.

Table 27

CURRENT DIRECT EXPENDITURE (Non-Scottish Owned / Tourist Boats)	
Area	**Expenditure**
Clyde	£2,620,704
West	£4,553,775
North	£1,793,981
East	£648,125
Scotland	**£9,616,585**

Total Expenditure

Applying the multipliers gives total expenditure.

Table 28

CURRENT TOTAL EXPENDITURE – VISITING BOATS (Non-Scottish Owned / Tourist Boats)	
Area	**Scottish**
Clyde	£4,114,505
West	£7,695,880
North	£3,031,828
East	£1,017,556
Scotland	**£15,859,769**

3.3.3 Current Total Tourist Expenditure (Expenditure by Non-Scottish Owned Boats)

The total current tourist expenditure generated by activities associated with resident (home port) and visitor berthing activities is summarised in the table overleaf.

Table 29

CURRENT TOTAL EXPENDITURE – RESIDENT AND VISITING BOATS (Non-Scottish Owned / Tourist Boats)			
Area	**Resident**	**Visitor**	**Total**
Clyde	£7,905,892	£4,114,505	£12,020,397
West	£2,889,140	£7,695,880	£10,585,020
North	£264,908	£3,031,828	£3,296,735
East	£37,916	£1,017,556	£1,055,472
Total	**£11,097,855**	**£15,859,769**	**£26,957,623**

3.3.4 Employment and Gross Value Added

Applying the output:employment and GVA factors set out earlier gives employment and gross value added as set out in the following two tables.

Table 30

EMPLOYMENT GENERATED BY NON-SCOTTISH OWNED / TOURIST BOATS	
Area	**Scottish**
Clyde	347
West	264
North	82
East	30
Scotland	**724**

3.4 Summary

The Sailing Tourism market currently accounts for £101 million of expenditure per year in Scotland and supports a total of just over 2,700 FTE jobs. Non-Scottish boat owners contribute a total of £27 million (27% of the total) and their expenditure supports a total of 724 FTE jobs.

Table 31

SUMMARY OF IMPACTS AT A SCOTTISH LEVEL (All Sectors)		
Activity	**Total (Activity by Scottish and Non-Scottish Boat Owners)**	**Tourist (Activity by Non-Scottish Boat Owners Only)**
Expenditure	£101.3 million	£27.0 million
Employment (FTEs)	2,732	724
GVA	£53.0 million	£14.0 million

4 THE FUTURE OF SAILING TOURISM IN SCOTLAND

4.1 Overview / Trends

Similar to all sectors of the economy, sailing tourism currently finds itself operating within one of the most unusual financial climates the Country has ever seen. Research conducted by the team has provided data on the sector reflecting the position in 2008 and 2009, at the very depth of the current recession. Interestingly, however, in terms of research amongst business operators, responses suggest no evidence of significant downturns in activity have been registered. However, some suggest 'individuals' may be to an extent curtailing or postponing certain items of major expenditure but this factor cannot be confirmed from the research and this is the 'first' ever national survey involving consumers.

In Scotland over the last decade and a half, up until the start of this recession, the sailing tourism sector has been growing at unprecedented levels. New marinas and expansions of existing facilities have been coming on line and been absorbed by the market with boat ownership in the UK and overseas growing. The growth continuing unabated, generating significant economic impact driven by a surge in boat ownership. Marinas and other berthing sources 'filling up' as time passed.

Across the World sailing tourism has been on the increase with boat ownership growing and the interest in sailing attracting the attention of many countries as they see it offering their economies opportunities in the future. Across the UK, Europe and further afield new marinas have grown up in answer to growing demand and are being used by many destinations to attract new tourist demand. (See a recent international benchmark study into tourism infrastructure development concluded in 2009 by TRC for SE that highlighted a number of benchmark case studies where countries as diverse as Mexico and Cyprus have in place national development strategies for the creation of new international standard sailing infrastructure and facilities. These strategies aimed at not just attracting visiting craft but are being progressed in a bid to attract the important higher spending resident boat market. These adding to the competitive world-wide environment).

In the UK many areas are considering and have developed new sailing infrastructure. Apart from the considerable growth in facilities in the South /

South West are the changes that have and are taking place in the North of England and Wales. These changes include new marinas in the last few years being developed on the East Coast at Hartlepool and on the West Coast at Whitehaven with talk of proposals for extension of facilities at Maryport in Cumbria near the Lakes National Park. This growth, particularly in the West, is providing additional and new competitive supply to Scotland by offering new visiting facilities for Welsh, Irish and Northern Irish boats and others from further afield.

In Scotland as is discussed later many also have aspirations to create new facilities that if successfully brought to market will add to the appeal and capacity of the Scottish marketplace.

Across the World and indeed in Scotland it is anticipated that once the current economic situation starts to settle then, like other forms of leisure and tourism world-wide, the sector will return to times of underlying growth. As can be seen from the consumer research, Scotland offers a number of appreciated benefits when it comes to its position as a sailing destination. These factors should stand it in good stead in the future helping it maintain and retain its share of existing markets. At the same time if new capacity can be created, then Scotland could attract and service new demand in future, from outside the Country, as the economy stabilises.

This study highlights the issues that need to be addressed if growth in future is to be achieved. The growth potential has been modelled by the team and forms the basis of calculation of the future potential economic impact that the sector could provide to Scotland if issues of capacity, service, etc are addressed.

4.2 Trends in the Sailing Tourism Economy – Future Opportunities

A range of markets offer opportunities to Scotland's sailing tourism economy in the future. These opportunities are not similar across the whole geography of the Country either in terms of volume or profile. Here again the four 'areas' in the future will exert different influences on the markets either by reason of accessibility, sailing environment / quality, infrastructure or service offering. These are discussed overleaf.

As already intimated Scotland's success as a sailing destination has until recently been on the ascendency with no obvious decline apparent even during the recession. A certain stability in demand is anticipated during the remainder of the year and in the immediate future with demand expected to remain flat until after 2010. However, thereafter it is realistic to expect that if the general economy starts to exhibit growth then this will be mirrored in the sailing sector.

Until now easily accessible and reliable data on the sailing tourism sector in Scotland has never historically been available. There is no single source of information or body that collates all relevant statistical data from which to draw or discuss historic trends. This is compounded by the fact there is no legal requirement for boat owners to register vessels, hence there is no source that can provide information on ownership / demand patterns.

In absence of this definitive boat ownership data it became obvious that if past market trends were to be used as an indicator / information source for plotting potential future growth in the sector, then it became extremely important to identify some form of 'benchmark' of past performance in the sector. In this regard our partners in the study, the BMF, provided an invaluable source of data. The BMF has for many years monitored generic trends in business patterns from information provided in confidence to them by its members.

A confidential interrogation of the data held by the BMF was conducted for this study. A brief of our requirements was provided by our team and the outcomes reported to TRC. A series of anonymous data collated geographically allowed certain assumptions to be made from what data was available as to what had potentially been the growth in boat ownership in each of the four geographic areas of Scotland over the last 10 years – assuming it mirrored a range of sectoral trading data.

This past performance informed the consultants' assessment of what could potentially be achieved in the future, in each area, assuming issues of supply, service, etc could be overcome and balanced with what the market wanted. Analysis of the data provided indicated that over the last five to 10 years annual growth in the sailing sector in each of the areas was, in broad terms, considered to be at the following levels.

Table 32

ESTIMATE OF ANNUAL COMPOUND GROWTH IN 'CORE' MARINA OPERATIONS[a]		
Area	**Over the 10 Year Timeframe (2000 – 2009) [b]**	**Timeframe (2004 – 2009) [c]**
Clyde	6.1%	7.6%
West	7.0%	5.6%
North & East	4.7%	7.0%

Note: [a] Utilising a constant sample of marinas across the timeframe for which information is available.
[b] 10-year period / 9 years of growth.
[c] 6-year period profiling the average growth over the last 5 years.

Source: BMF / TRC

The data in the above table has informed our projection of the potential future position in Scotland. Below we present a model of future potential demand. We have modelled what could be the position in Scotland, in the sector, in the future in a five and 10-year timeframe.

4.3 Potential Scale and Profile of Future Demand

Presented overleaf is the consultancy's estimate of potential future levels of demand that could be anticipated to evolve in each area over the five and 10-year timeframe (assuming the economy stabilises and returns to growth). In each case research currently suggests that the occupancy levels within the existing supply are extremely high, at virtually maximum capacity, with supply and demand in balance in the main for 'residential' home port berths.

Historically in many instances 'supply' has led demand with new facilities coming on stream and gradually being absorbed by the marketplace until what is now virtually a situation when the current available stock is 'full' and operating at maximum occupancy – the supply and demand in balance.

Demand is attracted into new facilities from both inside and outside the domestic Scottish marketplace. This supply unlocking new markets. In modelling the future position, in light of historic data, the professional team have assumed varying 'growth' levels in the sector across the differing geographies of Scotland.

Growth has been assumed at levels that are commensurate, but less ambitious, than those achieved in the past. These growth patterns are considered to be achievable in a more stable economic environment and have been applied to the current 'available stock' figure to calculate what will be the stock required to accommodate future demand at occupancy levels similar to those achieved today. (This provides a picture of new stock 'required' to meet anticipated growth in demand and balance the market, allowing the existing and new operations to continue trading at levels of occupancy similar to those achieved today).

Setting future 'stock needs' using the model as described provides a strategic planning horizon for the sector. When modelling the future economic impact of the sector the calculation of the scale of demand has taken the new top-line supply figure of moorings and assumes occupancy of these berths at today's levels. This occupancy is displayed overleaf and discussed in Section 6.

In addition to the resident berth sector there is the berthing targeted at visiting boats where there is already a certain shortage of supply. This shortfall is particularly apparent in certain locations at certain times of the year in 'sail to' and 'sail through' locations ie berths available for visiting vessels (see issues re the future discussed in later sections of this report).

Profiled below are the growth rates in supply / demand it is assumed might be achieved in the sector across the different geography of Scotland's Sailing Tourism sector over the next 10-year period. Estimates of future demand / supply needed in Scotland have been set to reflect what might be the future position in 2014 and 2019 – five to 10 years out.

Table 33

FUTURE GROWTH RATES ASSUMED FOR EACH AREA		
Area	**Growth in Resident Berthing per Annum**	**Growth in Visitor Berthing Per Annum**
Clyde	Assumed 5% on pontoons and commercial moorings; and 1% growth on private / club moorings	The ratio between Resident and Visitor Berths assumed to remain at the same as at present
West	Assumed 3% on pontoons and commercial moorings; and a further growth in the supply of 1% on private / club moorings	The study assumed a 5% growth in the supply / demand for visitor berths
North	Assume 4% growth in demand / supply on total resident boat / facilities	The study assumed a 5% growth in the supply / demand for visitor berths
East	3% anticipated growth on both formal and private moorings	0.5% – Modest growth in visitor boat demand anticipated

Note: It is assumed that to reflect the current economic downturn that there will be a moratorium in the growth of supply / demand in 2010.

Source: TRC

The growth patterns for infrastructure supply / demand identified above assume a robust market as it is anticipated that with a return to economic stability the sector could again return to growth. The growth rates assumed by this study and outlined above are considered possible in light of past performance of the sector. They reflect what might be averages each year. In the final analysis the flat-lining in 'demand' may go beyond 2010 and the moratorium in growth assumed but after that growth levels may be higher than those assumed, nearer to the historic position. (See Section 4.2).

Growth in the future is anticipated and likely to come from a number of market segments and sources. These to include:

- Demand from new Scottish boat owners resident in Scotland for 'home port' resident berths;
- Demand from boat owners resident outside Scotland, principally from other parts of the UK (this area exhibiting growth in the last few years) for home port facilities in Scotland;
- Demand from those boat owners visiting Scottish waters as part of a sailing holiday / cruise itinerary seeking visitor berthing facilities (including those from other parts of the UK, Eire as well as overseas visitors);
- Demand from Scottish-based resident boats moving around and between areas for overnight berthing facilities whilst on short trips, holiday / cruising itineraries;
- Demand from those who will charter a vessel for a holiday / leisure tourism trip;
- Demand from those attending sailing training courses, etc.

These are and will be the main demand sources in the future with each of the sailing areas anticipated to attract different mixes and levels of demand reflecting their popularity and asset bases. The profile of boat owners also varying with patterns indentified today being expected to continue into the future.

If the future growth rates in strategic infrastructure outlined above are to be achieved, the following stock levels will be required in future.

Table 34

FUTURE RESIDENT AND VISITOR BERTHING CAPACITY						
Area	Future Resident Berthing Capacity			Future Visitor Berthing Capacity		
	5 Years	10 Years	Growth in Berths Required in 10 Years	5 Years	10 Years	Growth in Berths Required in 10 Years
Clyde	5,550	6,821	2,094	783	1,000	356
West	3,303	3,663	617	755	964	343
North	2,042	2,485	739	328	419	149
East	1,575	1,825	426	151	155	7

Source: TRC

The future 'demand' position highlighted below has been modelled to inform the future economic impact that the sector might achieve.

Assumptions on the occupancy levels achieved by the resident moorings have been made at levels commensurate with those currently achieved. Demand will also emanate from visiting boats on visiting moorings and also from those 'dropping anchor'.

The estimates of different growth patterns applied to existing demand profiles suggest the following demand levels could be anticipated in the future.

Table 35

FUTURE DEMAND PROFILE								
	Five Years Out 2014				Ten Years Out 2019			
Area	Resident Berths Occupied	% Increase on Current	Visiting Boat Nights [(a)]	% Increase on Current	Resident Berths Occupied	% Increase on Current	Visiting Boat Nights	% Increase on Current
Clyde	5,162	17%	59,911	22%	6,344	44%	76,463	55%
West	3,039	8%	107,408	12%	3,370	20%	137,083	43%
North	1,940	17%	18,872	18%	2,360	42%	24,087	51%
East	1,566	12%	6,643	3%	1,804	29%	6,811	5%
TOTAL	**11,706**	**14%**	**192,835**	**15%**	**13,878**	**35%**	244,444	**46%**

Note: [(a)] Includes Drop Anchor Boat Nights

Source: TRC

4.4 Conclusion

It is clear from the above modelling of future demand that a range of issues need to be addressed if these levels of potential demand are to become reality. These factors include:

- Overcoming issues of shortfall and dissatisfaction with the current offering in terms of quality;
- Providing sufficient resident berthing capacity to service the new demand;
- Ensuring sufficient transit berthing re mooring for visiting boats is available – berthing needs to be of the right type in the right location in the future to meet and service anticipated potential growth in demand (see ‘sail to’ and ‘sail through’ berths as opposed to resident ‘sail from’ berths).

Sections 6 and 7 discuss the developments needed to address these issues and ensure that the future potential can be unlocked.

5 ECONOMIC IMPACT FROM FUTURE GROWTH IN THE SECTOR

5.1 Introduction

This section sets out the level of extra economic impact that could be achieved on the current baseline from the anticipated increase in the size of the sailing tourism market in Scotland. The impacts are generated through growth in supply and demand for permanent resident home port berths as well as visitor berths and moorings.

The economic analysis provides an assessment of the total value of activity in the sector generated by Scottish residents and tourists (from outwith Scotland)[10]. An analysis of activity generated by non-Scottish / tourist boats is also presented separately.

This analysis is an assessment of the increased economic contribution on the current baseline achieved from a growth in the market and the net additional impact (less displacement at this time)[11]. It is not an assessment of the net additional impact generated by the public sector investing in the market as this cannot be determined at this time as the specific projects that they may invest in have not yet been identified. Therefore, deadweight and substitution are not considerations at this time. The growth scenarios consider a 5 and 10 year horizon.

5.2 Future Increase (All Sectors Scottish and Non-Scottish)

5.2.1 New Resident Berths and Moorings

Number

The estimated number of new occupied resident berths and moorings are given in the table overleaf. (See earlier section where growth rates and new infrastructure capacity is discussed).

[10] For the purposes of this study a tourist is defined as someone from outside Scotland.
[11] Leverage is accounted for as part of the process as we are looking at the impact in Scotland.

Table 36

NEW RESIDENT (HOME PORT) BERTHS AND MOORINGS OCCUPIED		
Area	**5 Years**	**10 Years**
Clyde	765	1,947
West	236	567
North	282	702
East	167	405
Scotland	**1,450**	**3,622**

For the purposes of the economic impact assessment we are interested in the number of berths and moorings that are occupied, as it is these that generate associated expenditure.

Average Expenditure

The new berths occupied have been categorised, as before, into high, medium and low[12] (as set out in the table below) for the purposes of the economic impact assessment.

Table 37

NEW RESIDENT BOAT BERTHS AND MOORINGS BY CATEGORY				
Area	**High**	**Medium**	**Low**	**Total**
5 YEAR				
Clyde	668	55	42	765
West	104	78	55	236
North	126	155	0	282
East	81	86	0	167
Scotland	**978**	**375**	**97**	**1,450**
10 YEAR				
Clyde	1,708	142	97	1,947
West	252	188	127	567
North	315	387	0	702
East	196	209	0	405
Scotland	**2,470**	**927**	**225**	**3,622**

The average expenditure used is again that by boat owners calculated from the consumer survey and includes expenditure on the maintenance, repair etc of the vessel associated with each category and the owner boat-related expenditure. (See Section 3 for a breakdown).

[12] The distinction between high, medium and low set on the basis of berth/mooring fees that research indicates consumers are currently paying

Direct Expenditure

The direct expenditure generated by new resident boats on an annual basis is provided below.

Table 38

DIRECT EXPENDITURE (New Resident Boats)		
Area	**5 Years**	**10 Years**
Clyde	£4,504,280	£11,490,920
West	£1,018,711	£2,453,373
North	£731,929	£1,824,073
East	£521,524	£1,266,418
Scotland	**£6,776,444**	**£17,034,782**

Displacement

Displacement is an assessment of the extent to which expenditure is simply moved from one part of the economy (in this case the Scottish economy) to another. We have estimated displacement levels in order to provide an analysis showing the overall size of the future market and the net additional market (with displacement applied).

There will be no displacement for the non-Scottish boat owners. They are new and will have been attracted to Scotland as a result of the developments that will have taken place in the market. For the Scottish boat owner there will be displacement as a proportion of their expenditure would already have been taking place in the Scottish economy. High displacement ranges from 70-90% and normally Scottish residents' expenditure would tend to be at the high end of this. However, within the Sailing market there are some reasons that would suggest that this would be lower, including:

- some Scottish residents may be encouraged to move their boat from other locations back to Scotland; and
- as the expenditure amounts to a lot over the year, it is reasonable to assume that some of the expenditure that would now be spent on a boat would have been used fro short breaks/holidays outwith Scotland.

For these reasons we have assumed that the level of displacement would be at the lower end of the high displacement – 70%.

Multipliers

This direct economic activity also has two types of wider impact on the economy:

- supplier effect: an increase in sales in a business will require it to purchase more supplies than it would have otherwise. A proportion of this 'knock-on' effect will benefit suppliers in the local and Scottish economies; and
- income effect: an increase in sales in a business will usually lead to either an increase in employment or an increase in incomes for those already employed. A proportion of these increased incomes will be re-spent in the local and Scottish economies.

The STMS[13] provides combined supplier and income multipliers[14].

Table 39

MULTIPLIERS	
Area	**Scotland Level**
Clyde	1.57
West	1.69
North	1.69
East	1.57

Total Expenditure

We have provided two figures the total value of the market (by only applying the multipliers) and net additional impact (by applying displacement and multipliers).

Table 40

TOTAL EXPENDITURE (New Resident Boats)				
Area	**5 Years**		**10 Years**	
	Total	**Net Additional**	**Total**	**Net Additional**
Clyde	£7,071,719	£3,779,211	£18,040,744	£9,759,020
West	£1,721,621	£852,237	£4,146,200	£2,113,168
North	£1,236,961	£412,411	£3,082,683	£1,034,095
East	£818,793	£254,130	£1,988,276	£610,840
Scotland	**£10,849,094**	**£5,297,989**	**£27,257,902**	**£13,517,124**

[13] Scottish Tourism Multiplier Study
[14] There are a mix of rural and remote rural locations in the North and East so we have applied an average between the two for these multipliers

5.2.2 New Visiting Boat Nights

Number and Average Expenditure

The number of new visiting boat nights it is estimated will be evident in Scotland in the future is given below. This includes visitor nights in formal facilities and assessment of those dropping the anchor. These boat nights are generated by Scottish resident boats and visiting tourist boats.

Table 41

NEW VISITING BOAT NIGHTS		
Area	**5 Years**	**10 Years**
Clyde	10,622	27,174
West	11,438	41,113
North	2,937	8,151
East	185	353
Scotland	**25,182**	**76,791**

The average expenditure per visitor boat night is again estimated at £130 based on the survey results. (See earlier comments).

Direct Expenditure

The direct expenditure generated by the new visitor boat nights is set out below.

Table 42

DIRECT EXPENDITURE (New Visiting Boat Nights)		
Area	**5 Years**	**10 Years**
Clyde	£1,380,795	£3,532,582
West	£1,486,984	£5,344,725
North	£381,851	£1,059,686
East	£24,079	£45,886
Scotland	**£3,273,709**	**£9,982,880**

Total Expenditure

Once again the different multipliers need to be applied which gives total expenditure.

Table 43

TOTAL EXPENDITURE (New Visiting Boat Nights)				
Area	**5 Years**		**10 Years**	
	Total	**Net Additional**	**Total**	**Net Additional**
Clyde	£2,167,849	£1,279,569	£5,546,154	£3,262,634
West	£2,513,003	£1,643,748	£9,032,586	£5,755,473
North	£645,328	£509,334	£1,790,870	£1,378,404
East	£37,803	£29,872	£72,041	£58,597
Scotland	**£5,363,983**	**£3,462,523**	**£16,441,651**	**£10,455,108**

5.2.3 Total Expenditure (Scottish Home Port Residents And Tourists)

The total new expenditure generated by all sectors ie resident (home port) and visitor berths in Scotland’s sailing tourism economy is summarised in the table overleaf.

Table 44

TOTAL NEW EXPENDITURE (All Sectors – Resident and Visiting Boats)			
Area	**Resident (Home Port) Berths**	**Visitor Berths**	**Total**
Total			
5 Years Out			
Clyde	£7,071,719	£2,167,849	£9,239,568
West	£1,721,621	£2,513,003	£4,234,624
North	£1,236,961	£645,328	£1,882,289
East	£818,793	£37,803	£856,596
Total	**£10,849,094**	**£5,363,983**	**£16,213,077**
10 Years Out			
Clyde	£18,040,744	£5,546,154	£23,586,898
West	£4,146,200	£9,032,586	£13,178,786
North	£3,082,683	£1,790,870	£4,873,553
East	£1,988,276	£72,041	£2,060,317
Total	**£27,257,902**	**£16,441,651**	**£43,699,553**
Net Additional			
5 Years Out			
Clyde	£3,779,211	£1,279,569	£5,058,780
West	£852,237	£1,643,748	£2,495,985
North	£412,411	£509,334	£921,745
East	£254,130	£29,872	£284,001
Total	**£5,297,989**	**£3,462,523**	**£8,760,512**
10 Years Out			
Clyde	£9,759,020	£3,262,634	£13,021,655
West	£2,113,168	£5,755,473	£7,868,641
North	£1,034,095	£1,378,404	£2,412,499
East	£610,840	£58,597	£669,438
Total	**£13,517,124**	**£10,455,108**	**£23,972,232**

5.2.4 Employment

The level of employment that this expenditure supports can be estimated using output:employment ratios. We have used the output:employment ratios from the STMS, as follows:

- Rural (Clyde and East): £34,650; and
- Rural / Remote Rural[15] (West and North): £40,050.

[15] There are a mix of rural and remote rural areas in the West and North so we have used a average for these areas.

Applying these gives employment impacts as set out below.

Table 45

NEW EMPLOYMENT GENERATED BY ALL SECTORS		
Area	**Total**	**Net Additional**
5 Year		
Clyde	267	146
West	106	62
North	47	23
East	25	8
Scotland	**444**	**240**
10 Year		
Clyde	681	376
West	329	196
North	122	60
East	59	19
Scotland	**1,191**	**652**

5.2.5 New Gross Value Added – (All Sectors)

Gross value added (GVA) has been estimated on the basis of GVA per employee (of £19,400[16]). This gives GVA as set out below.

Table 46

GROSS VALUE ADDED GENERATED BY ALL SECTORS		
Area	**Total**	**Net Additional**
5 Years		
Clyde	£5,173,091	£2,832,333
West	£2,051,229	£1,209,042
North	£911,770	£446,488
East	£479,595	£159,008
Scotland	**£8,615,685**	**£4,646,871**
10 Years		
Clyde	£13,205,940	£7,290,623
West	£6,383,731	£3,811,526
North	£2,360,722	£1,168,601
East	£1,153,539	£374,808
Scotland	**£23,103,933**	**£12,645,559**

[16] Scottish Annual Business Statistics 2007.

5.3 Future Increased Economic Activity by Tourist Boats (Non-Scottish Owned Boats)

This section provides a separate analysis of the impact generated by new, tourist activity ie activity by non-Scottish owned boats in the Scottish sailing tourism economy.

5.3.1 New Resident Berths And Moorings (Tourist Boats)

Number

The number of new (occupied) resident berths and moorings that it is anticipated will be owned by non-Scottish domiciles (tourists) is shown in the table below.

Table 47

BERTHS AND MOORINGS (New Tourist Owned Boats)		
Area	**5 Years**	**10 Years**
Clyde	249	654
West	59	151
North	13	32
East	2	4
Scotland	**323**	**841**

Once again these have been divided into high, medium and low expenditure categories as before.

The average spend levels applied to each are the same as those set out earlier and assumed from research findings.

Direct Expenditure

The direct new expenditure generated on an annual basis in the future by these new tourist resident boats is given overleaf.

Table 48

NEW DIRECT EXPENDITURE (Tourist Owned Resident Boats)		
Area	**5 Years**	**10 Years**
Clyde	£1,508,367	£3,955,230
West	£283,813	£734,834
North	£34,931	£92,384
East	£7,727	£13,064
Scotland	**£1,834,838**	**£4,795,512**

Total Expenditure

As discussed earlier there is no displacement resulting from the new non-Scottish boat owners (so the total expenditure and net additional expenditure are the same). Applying the multipliers gives direct, indirect and induced expenditure as set out below.

Table 49

TOTAL NEW EXPENDITURE (Tourist Owned Resident Boats)		
Area	**5 Years**	**10 Years**
Clyde	£2,368,136	£6,209,710
West	£479,644	£1,241,869
North	£59,033	£156,129
East	£12,131	£20,511
Scotland	**£2,918,944**	**£7,628,219**

5.3.2 New Visiting Boat Nights (Tourist / Non-Scottish Owned Boats)

Number and Average Expenditure

The number of new visiting boat nights generated by non-Scottish (tourist) boats it is estimated will be made in the future is given below. This includes visitor boat nights in formal facilities and an assessment of those dropping the anchor.

Table 50

NEW VISITING BOAT NIGHTS (Tourist Owned Boats)		
Area	**5 Years**	**10 Years**
Clyde	4,404	11,191
West	5,786	19,804
North	2,053	5,469
East	130	259
Scotland	**12,373**	**36,723**

Direct Expenditure

Applying the average expenditure of £130 per boat night identified by research across all sectors gives direct expenditure generated by the anticipated additional 'tourist' boat nights as set out below.

Table 51

DIRECT EXPENDITURE FROM NEW VISITING TOURIST BOATS		
Area	**5 Years**	**10 Years**
Clyde	£572,534	£1,454,766
West	£752,195	£2,574,554
North	£266,894	£711,025
East	£16,861	£33,653
Scotland	**£1,608,484**	**£4,773,998**

Total Expenditure

As above there is no displacement. Applying the multipliers gives total expenditure.

Table 52

TOTAL EXPENDITURE FROM NEW VISITING TOURIST BOATS		
Area	**5 Years**	**10 Years**
Clyde	£898,878	£2,283,983
West	£1,271,210	£4,350,996
North	£451,051	£1,201,633
East	£26,472	£52,836
Scotland	**£2,647,611**	**£7,889,447**

5.3.3 Total Tourist Expenditure (Expenditure by Non-Scottish Owned Boats)

The total tourist expenditure generated by activities associated with resident (home port) and visitor berthing activities is summarised in the table overleaf.

Table 53

TOTAL NEW 'TOURIST' NON-SCOTTISH BOAT EXPENDITURE			
Area	**From Resident (Home Port) Berths**	**From Visitor Berths**	**Total**
5 Years Out			
Clyde	£2,368,136	£898,878	£3,267,014
West	£479,644	£1,271,210	£1,750,854
North	£59,033	£451,051	£510,084
East	£12,131	£26,472	£38,603
Total	**£2,918,944**	**£2,647,611**	**£5,566,555**
10 Years Out			
Clyde	£6,209,710	£2,283,983	£8,493,693
West	£1,241,869	£4,350,996	£5,592,865
North	£156,129	£1,201,633	£1,357,762
East	£20,511	£52,836	£73,347
Total	**£7,628,219**	**£7,889,447**	**£15,517,666**

5.3.4 Employment and Gross Value Added

Applying the output:employment and GVA factors set out earlier gives employment and gross value added, from tourist boat activity as set out in the following two tables.

Table 54

EMPLOYMENT FROM NEW TOURIST ACTIVITY	
5 Years Out	
Clyde	94
West	44
North	13
East	1
Scotland	**152**
10 Years Out	
Clyde	245
West	140
North	34
East	2
Scotland	**421**

Table 55

GROSS VALUE ADDED FROM NEW TOURIST ACTIVITY	
5 Years Out	
Clyde	£1,829,150
West	£848,104
North	£247,082
East	£21,613
Scotland	**£2,945,950**
10 Years Out	
Clyde	£4,755,488
West	£2,709,153
North	£657,692
East	£41,066
Scotland	**£8,163,399**

5.4 Summary – All Activity (Scottish Domicile and Tourists)

A summary of the impact of the increase in the market is provided in the table below.

Table 56

SUMMARY – TOTAL MARKET		
Activity	**Total (Activity by Scottish and Non-Scottish Boat Owners)**	**Tourist (Activity by Non-Scottish Boat Owners Only)**
Current		
Expenditure	£101.3 million	£27.0 million
Employment (FTEs)	2,732	724
GVA	£53.0 million	£14.0 million
5 Years (Increase)		
Expenditure	£16.2 million	£5.6 million
Employment (FTEs)	444	152
GVA	£8.6 million	£2.9 million
10 Years (Increase)		
Expenditure	£43.7 million	£15.5 million
Employment (FTEs)	1,191	421
GVA	£23.1 million	£8.2 million
5 Years (Current plus increase)		
Expenditure	£117.5 million	£32.5 million
Employment (FTEs)	3,176	876
GVA	£61.6 million	£17.0 million
10 Years (Current plus increase)		
Expenditure	£145.0 million	£42.5 million
Employment (FTEs)	3,923	1,145
GVA	£76.1 million	£22.2 million

Table 57

SUMMARY – NET ADDITIONAL INCREASE		
Activity	**Total (Activity by Scottish and Non-Scottish Boat Owners)**	**Tourist (Activity by Non-Scottish Boat Owners Only)**
Current		
Expenditure	£101.3 million	£27.0 million
Employment (FTEs)	2,732	724
GVA	£53.0 million	£14.0 million
5 Years (Net Additional Increase)		
Expenditure	£8.8 million	£5.6 million
Employment (FTEs)	240	152
GVA	£4.7 million	£3.0 million
10 Years (Net Additional Increase)		
Expenditure	£24.0 million	£15.5 million
Employment (FTEs)	652	421
GVA	£12.7 million	£8.2 million
5 Years (Current plus net additional increase)		
Expenditure	£110.1 million	£32.5 million
Employment (FTEs)	2,972	876
GVA	£57.7 million	£17.0 million
10 Years (Current plus net additional increase)		
Expenditure	£125.3 million	£42.5 million
Employment (FTEs)	3,384	1,145
GVA	£65.7 million	£22.2 million

The current value of the market is £101 million (27% of which is expenditure from non-Scots) and with development of the market this could increase by £44 million to £145 million (with 29% from non-Scots) after 10 years.

However, that is the increase in the total market. Some of this expenditure will have been displaced from other parts of the Scottish economy. Therefore, allowing for displacement gives a potential net additional increase in expenditure of £24 million over the next 10 years. This net additional increase would support a further 650 FTE jobs and generate GVA of £12.7 million.

6 FUTURE SERVICE AND INFRASTRUCTURE REQUIREMENTS – TOWARDS A SPATIAL DEVELOPMENT FRAMEWORK

6.1 Introduction

This report is designed to be a market and economic overview of the sailing tourism sector in Scotland but the brief to the consultants also requested an analysis of any issues that potentially are or could hinder future growth in the sector. It is anticipated that if these are better understood in broad terms, at this time, it will allow early steps and planning to be undertaken to ensure that any barriers to future growth can be removed from the equation. In an attempt to highlight what these barriers might be, the consumer and operator research work undertaken sought to identify areas of current dissatisfaction with the product or where shortfalls exist now or potentially in the future, in terms of infrastructure provision and supply.

Shortcomings and gaps identified form the sectoral development needs which by their very nature, given the geographic differences inherent in the sector point to development agendas with a ‘spatial dimension’. Discussed below are the future needs / gaps assembled into what could be considered a Strategic Spatial Development Framework. The framework spotlights issues that need to be addressed if the future economic potential that could be achieved in the next five to 10 years is to be realised.

6.2 Berthing Capacity – An Overview

One of the main issues affecting future success will be Scotland’s (and the different regions’) ability to provide sufficient infrastructure in the future. This principally will revolve around resident berthing capacity and berths / moorings for visiting boats from other parts of Scotland, the UK and overseas. Research already suggests that currently the availability of ‘home port’ / residential berthing facilities sees supply and demand generally in balance. However, with anticipated growth in Scottish boat ownership and others relocating their boats from outside Scotland to Scottish ‘home ports’ etc then there will be a shortfall in this crucial infrastructure in the future. The potential scale of that shortfall is modelled and discussed in other sections of the report.

If the development / infrastructure required is not provided then there is a potential likelihood of a restraining effect on the market – however, research to date suggests that the private commercial sector is already actively viewing developments that in many locations will fill any infrastructure gaps in the residential berthing market (this is discussed in more detail below. See Appendices which profiles new developments indentified by this study).

Of concern, however, and identified by consumer research, is the shortfall in available visitor berthing for those on day / longer cruises away from home ports or boats visiting Scottish waters. This sees it commonplace in some areas for boat owners to be unable to secure a formal berth in a destination they are visiting and sees them having to 'drop the anchor' offshore – an often less than optimum situation for many. It suggests the preference for visitors to 'sail to' and 'sail through' locations to have recognised berths. However, this is one of very few areas of dissatisfaction that the research was able to identify from the consumer research. It is not yet a major issue curtailing significant levels of demand in all locations but is of significant concern in certain locations – notably the West Coast during the popular summer season and with further growth in the sector will become more of an issue. This shortage of formal berthing is undoubtedly constraining onshore spend from boats and their crew in fragile rural economies.

The issues of sufficient resident and visitor berthing will need to be addressed in future if the full potential of the sector is to be unlocked (see later discussion on delivery models and development framework).

The berthing strategic planning horizon for residential and visitor berthing shortfalls that will need to be filled if future economic impact projections are to be realised, are discussed in more detail later. How the various gaps will actively be tackled / filled eg residential home ports as well as the 'sail to' and 'sail through' destinations, where berthing is needed to meet often very seasonal peaks in demand, is an issue that needs to be considered. See delivery mechanism, viability and prioritisation of development.

6.3 Ancillary Facilities and Services

Anecdotal evidence abounds across the wider Scottish tourism sector of infrastructure shortfalls in terms of supply of services and in instances quality of provision adversely affecting the market. This is no less so than in the sailing sector where many tell stories of visiting sailing destinations where there is insufficient supporting infrastructure or quality and offering eg shops, bars, restaurants, attractions, etc. In order to test this issue the consumer research sought to identify if there were any major failings at the national or even the regional level. However, in many instances, there are also stories of examples of good practice. Others can tell stories where they have sailed into a location and found 'gems' that are of an international standard. (See below).

The response to the relevant questions in the consumer survey suggest that in certain locations there are issues with, as previously indicated, 'berthing' but when it came to other parts of the sailing package / visitor feedback is less than conclusive re other supporting services. Given this is a national strategy it is not within its remit to pick up on individual cases. However, the importance of provision and quality of supporting infrastructure provision cannot be ultimately removed from the equation. This however, is a regional / local issue that in the main cannot be entered into by lengthy discussion at this juncture or individual solutions provided within the confines of this report, other than to suggest that in future the range and quality of any locations support to its marine-borne visitors is important.

As indicated earlier, the key factors currently influencing consumers are the scenery, the quality of the sailing waters and the 'un-crowded' aspects of the sailing as well as the 'people'. To reiterate however, land-based services viz hospitality and quality are ultimately issues which need to be addressed.

Some recent developments at different levels that are considered by some to be examples of good practice viz facilities and services include: at the larger scale, Portavadie's recent development has seen the provision of exciting new facilities on the Clyde, particularly for those on trip itineraries; Tobermory also offers a good example of wider community involvement in the delivery of facilities. Recent developments see the Town offer new berthing and land-based facilities that provide an excellent yacht station / sail to destination.

On a much smaller scale the development of step ashore, pontoons in a 'classic' anchorage have been provided at Acarsaid Mhor on Eriskay. Land-based toilet blocks, laundry facilities etc providing excellent new visiting facilities for craft.

The interesting facts surrounding each of these developments is their differing scale and 'models' for funding / delivery. Portavadie is a significant private sector commercial investment; Tobermory a mixed scheme involving the community and others; and Eriskay a small-scale private investment.

(Research also uncovered few problems associated with existing technical supporting services re the sailing tourism sector viz engineering, chandlery, etc).

6.4 Conclusion

To successfully unlock the future potential of the sector will require the various regions of Scotland to rise to the challenges of creating more infrastructure. This will see the need firstly for more home port berthing to host new boats entering the economy, be they owned by people resident in Scotland or others living elsewhere in the UK or overseas. These boats becoming both resident and visiting boats when they leave their home port and traverse neighbouring areas calling in on other locations, spreading their spending power across other parts of the Scottish economy.

For visiting boats from outside Scotland and those boats domiciled in Scotland who travel on trips, the main development issue is berthing capacity in 'sail to' and 'sail through' destinations for those on day visits, cruises, boat touring and charter holidays. Provision of these facilities is a precursor to success (see delivery model for same discussed later).

7 DEVELOPMENT FRAMEWORK

7.1 Introduction

The previous sections provided a general overview of the scale of future development needed in each of the sailing areas to fill potential future infrastructure gaps and unlock the economic opportunity. The detail of this is explored further below.

It should be reiterated that this document is not a prescriptive development strategy for the sailing tourism sector but has been prepared to provide information and data on the sector and to raise the issues affecting its future performance and growth. The solutions to the issues raised herein will undoubtedly come from answers provided by discussion amongst the wide ranging individuals and organisations with a vested interest in the future success of the sector. (See comments on future delivery models and ways of taking forward the opportunities offered by the sector).

7.2 National Framework – An Overview

The report utilises a geographic and spatial dimension that encapsulates four main areas of sailing 'activity'. Future development that would help unlock potential identified by the study is discussed at this level. The comments contained in the report are reflective of what it is considered is required in each area, albeit the focus, detail and location of individual elements will ultimately need to be afforded much more consideration by investors and others at the appropriate time. The framework suggested here is not prescriptive but provides a backdrop to inform discussions and prioritisation of investment of others in the future.

The team's original thinking was to evolve some form of measurement framework or options appraisal matrix to help highlight future developments identified by the study that should be prioritised, to achieve maximum impacts and benefits, including GVA. In the final analysis the decision was made not to follow this path as in the first instance the sector itself, with industry leadership, needs to evolve and agree a national 'development strategy' (albeit informed by this document). Thereafter prioritisation of individual development projects only becomes an issue for those (individuals / organisations) that will ultimately drive forward / champion / invest in each project. These decisions are not ones for this study other than to highlight what are indeed the most serious gaps / infrastructure shortcomings in each of the areas, if ultimate potential is to be unlocked (the focus of development in each varying – see overleaf).

In each individual development case GVA is but one issue that will need to be assessed, others would include: cost of development vs return on investment; environmental impact, sustainability and site issues; conflicts with other users, etc. This sees the need for much more detailed consideration of individual projects which is not the remit of this study. At this time the consultants are not conducting in-depth feasibility studies of projects – this will come in the fullness of time and is a task for project champions. (Of importance for SE and the other public agencies in this assessment process will be the new evolving targets of the Scottish Government surrounding environmental and ecological sustainability and marine development).

The following notes are provided and can be used to inform the future direction of the sector nationally. These notes potentially forming the basis of a sectoral development strategy.

7.3 The National Picture

Research clearly indicates a sector that has grown over the years. That growth is anticipated to re-establish itself in the mid to longer term as economic stability returns. If the opportunities are to be capitalised on then Scotland must offer new infrastructure to host boats (resident boats and visiting boats). Analysis of research findings and projections for the future clearly indicate that the focus of future market activity and subsequently development needed to meet the markets' demand in the future would see focus being given to the Clyde and the West Coast; with more modest levels of development needed in the North; and even less on the East Coast where the market is mainly one revolving around activity by Scottish residents with lower levels of non-Scottish boat owner activity.

Focus on the Clyde and West Coast and to a lesser extent the North is also envisaged as a good strategic move as these are the locations that have in the past proved attractive to boat owners from outside Scotland. The Clyde and West has the highest concentrations of non-Scottish resident boat owners and visiting boats. These are the most important sectors when it comes to the sailing tourism economy in generating economic additionality and GVA for Scotland's economy.

In strategic terms the most important 'target' and markets for Scotland in future should be to attract more non-Scottish domiciled boat owners to permanently moor / berth their vessels in Scotland. (As can be seen from the significant levels of expenditure generated across Scotland by Scottish resident boats). This is seen as a key target for the future. The next priority is seen as servicing the needs of visiting boats particularly from outside Scotland by providing 'sail to' and 'sail through' berthing destination opportunities.

Overall the aim is to build on Scotland's existing market appeal. The framework provides pointers and a reference for development of facilities and infrastructure for the important non-Scottish marketplace as well as indigenous markets.

Within each of the key sailing areas not only the scale but the shape of the development requirements – see earlier comments. Research has already identified a number of projects that are being progressed by the public and private sector in each area (these are profiled in the Appendices). Analysis of these projects sees the commercial sector leading on development of mainly 'sail from' or home-base marina projects. However, the infrastructure issue in many cases in Scotland is the future provision of the important 'sail to' and 'sail through' facilities that are required to enhance Scotland's sailing product (see overleaf). It is these facilities that currently appear to lack any strong champions / operators waiting in the wings to develop – possibly as these projects are often seasonal business models and do not provide the commercial return on investment that private sector operators seek. This is an issue for the future.

The following provides an overview of the potential infrastructure gaps in the future if a balance is to be achieved and maintained between supply, demand and operationally viable occupancy levels.

Table 58

NATIONAL STRATEGIC PLANNING TARGETS
(Supply Gaps Anticipated if Growth Returns to the Market)

Timeframes	Additional Resident Berths and Commercial Moorings Required	Berths Required for Visitors	Private / Club Moorings	Additions to Current Stock Required	If Targets Met New National Stock Levels
5 Years (by 2014)	1,447	334	105	**1,886**	14,488
10 Years (by 2019)	3,633	854	243	**4,730**	17,331

Source: TRC

7.4 The Clyde

As profiled earlier the Clyde offers a significant portfolio of assets and offers the highest concentration of facilities in Scotland. The area is the 'home port' of choice for the majority of boat owners in Scotland. Projections of potential growth in the area point to a need in the future for new berths of all types:

- Home berths / moorings ('sail from' facilities);
- 'Sail to' and 'sail through' berths / moorings for those visiting from outside Scotland and Scottish boats on trips / cruises.

The analysis of the data re needs and new projects in the pipeline (see Appendices) suggests that the commercial sector as well as other project champions are already prioritising / considering a wide range of developments that will help address the area's need for additional home port / 'sail from' moorings / berths. Where there is little apparent activity is in promoting development in the 'sail to' and 'sail through' facilities.

The conclusion at this time is to recommend that under any Development Framework in strategic terms the evolution of new hubs / marinas as home ports should, in the Clyde, be left, in general, to the commercial sector albeit individual projects may require a range of support to eventually become a reality. Conversely, in terms of visitor berthing provision, some form of external championing or 'kick start' would appear to be needed as there are few projects being mooted. In the Clyde a 'champion' of types is a situation that already exists – see Sail Clyde, an industry sector body that has come together to promote and encourage development of sailing infrastructure in the Clyde.

This body has already evolved an Industry-led strategy and has adopted an Action Plan for the future that is aimed at helping facilitate delivery of infrastructure. (This industry body has a direct fit with the aims of the product development strategy format currently being championed by SE and is considered to potentially offer a model for delivery in other parts of Scotland).

In the main, 'Sail Clyde' plans to target its activities and foster the development of 'sail to' and 'sail through' facilities. The industry group plan to provide a range of support to communities, businesses and others to foster the creation of new services and infrastructure across the geography of the Clyde in areas / locations where research suggests there are currently, and likely to be in the future, shortfall in sailing infrastructure (berths / moorings etc).

An abridged version of the Sail Clyde Action Plan is attached in the Appendices to this report and highlights development priorities for the area that are endorsed by this report.

The activities of the Group are planned to provide ‘reactive’ support to those bringing forward projects that are ‘home port’ marina developments. However where the issue is visitor infrastructure the group seek to take a more proactive role in encouraging development of visiting boat infrastructure in locations like Arran (Lamlash) and other visitor hotspots eg Millport, Kames, etc. The conclusion is that in the Clyde the focus for the future would be to see Sail Clyde act as an industry-led voice and delivery / support vehicle for the provision of infrastructure for visiting craft at the same time providing moral and other support to the private sector in their bids to bring new ‘sail from’ / home port projects forward.

Sail Clyde in effect, as suggested, could be a model for industry-led groups to progress future delivery of infrastructure development across Scotland and within each of the main sailing areas. Forming similar industry-led groups to champion the developments highlighted by this study could in itself be one of the main beneficial outcomes of the study (as indicated such a move has a direct link with current thinking emerging from the Tourism Industry Leadership Group within SE).

In summary, the following infrastructure development needs to take place over the medium term if the Clyde area is to provide the berthing capacity required to unlock future potential.

Table 59

CLYDE BERTHS – STRATEGIC PLANNING TARGETS
(Supply Gaps Anticipated if Growth Returns to the Market)

Timeframes	Additional Resident Berths and Commercial Moorings Required	Berths for Visitors Required	Private / Club Moorings	Additions to Current Stock Required	Potential New Stock Levels
5 Years (by 2014)	778	139	45	**962**	6,333
10 Years (by 2019)	1,989	355	105	**2,449**	7,821

Source: TRC

In Appendix VIII we provide a detailed breakdown of the number of new berths with planning permission / rumoured or aspirational in the pipeline in the Clyde, this suggests 290 with planning permission and 2,995 rumoured / aspirational.

In conclusion it is considered that for the Clyde the key economic opportunity that exists and around which future promotional / marketing activity by operators and national agencies should focus is attracting more non-Scottish boat owners to use the Clyde as their home port. This sector in particular offering interesting opportunities for the location and will provide commensurate additionality at a Scottish level in terms of economic impact.

Other opportunities exist but these are more domestic in nature. The visiting craft market from outside Scotland would also benefit from the provision of additional visiting berths as would the regional home port market as the appeal of the destination would increase.

7.5 <u>The West</u>

The West provides some of Scotland's most varied and interesting sailing grounds. The area is home port to a significant number of boats but in visiting craft terms is Scotland's main 'destination'. This includes boats from outside Scotland as well as inter-regional visitors from Scotland's other sailing areas. The West area has been reviewed by this study but was also part of an earlier regional study conducted by TRC in the spring of 2009.

A significant level of supply and demand data now exists for the area and this has led to a number of key recommendations being made for future development. In strategic terms the main requirements, to meet future needs are the creation of visitor / summer resident boat hubs in locales like Portree, Mallaig, Arisaig and Oban. In other locations there is a significant need for smaller clusters of moorings to service visiting boat demand (sail through and sail to destinations) as identified by the earlier study and from responses to the consumer survey conducted as part of this study.

Projections of future berthing requirements in the area suggest the following requirements are the medium-term picture.

Table 60

THE WEST BERTHS – STRATEGIC PLANNING TARGETS (Supply Gaps Anticipated if Growth Returns to the Market)					
Timeframes	**Additional Resident Berths and Commercial Moorings Required**	**Berths for Visitors Required**	**Private / Club Moorings**	**Additions to Current Stock Required**	**Potential New Stock Levels**
5 Years (by 2014)	197	134	60	**391**	4,058
10 Years (by 2019)	478	343	138	**959**	4,627

Source: TRC

In Appendix VIII we provide a detailed breakdown of the number of new berths with planning permission / rumoured or aspirational in the pipeline in the West, this suggests 155 with planning permission and 344 rumoured / aspirational.

The West has already been the subject of a regional study, undertaken by the consultants, which provided a development framework for the future of the area based in part on projects that were being considered as part of Sail West[17] (a European initiative). The development proposals identified by that earlier study (which did not have the benefit of the important consumer feedback that has now informed this development framework) are attached in the Appendices. These earlier development proposals have in effect been confirmed by the findings of this latest study and provide a detailed development framework for the West that it is believed should be embraced by any national framework.

The development recommendations identified by the earlier study have been afforded in each case a degree of priority from a 'needs' basis viz consumer demand / satisfaction. At this time, that is considered an appropriate basis for prioritisation and ultimately each project needs to be assessed on its own merits viz commercial sustainability, GVA impact, environmental sustainability etc.

What is clear is that in the West many of the projects are for smaller-scale developments (confirmed by consumer research) and in a number of cases progressing them will require a range of different approaches and may call for more innovative delivery funding models.

[17] Note: The Sail West project is a European initiative that is seeking to move the sailing product in the West of Scotland and Ireland forward. The initiative has recently been advised of an imminent funding offer.

The recommendations contained in the earlier report would see the prioritised ‘Green Projects’ satisfy the potential future requirements the analysis suggests are the gaps that need to be filled in the first five years. However in the West, if the 10-year projections of growth are to be achieved then there will be a shortfall in infrastructure provision assuming even the second tier or ‘Amber Projects’ included in the earlier study are progressed. This indicates the need for further consideration of development in the west area and the creation of ‘strategic hubs’.

As already indicated whilst there is a strategic need for facilities in this part of Scotland the commercial sustainability of such development is an issue given the seasonality of operations. There are commercial / home port projects in the pipeline but it is likely that ‘delivery’ of much of the new supply needed in the West will prove problematic in the future. Consideration needs to be given to how, in the medium to longer term, the gaps might be filled in the strategically important ‘sail to’ and ‘sail through’ facilities that are not first choice investments for the commercial sector. These facilities are a key need in the area if it is to maintain its appeal in the important visiting boat sector and attract more vessels in future.

The issue of the future and delivery models will need to be addressed in the West. The earlier Sail West study highlighted a number of, often rural locations, which would benefit from the development of marine infrastructure, however, champions / operators are needed to take these forward. A body evolving from the Sail West initiative to form an equivalent of the Sail Clyde group may in part be a solution.

7.6 The North

The North area of the Scottish sailing product is seen by many as being at the ‘fringe’ of activity but drilling down into the marketplace produces some revealing facts. The area has seen its supply of berthing increase in recent years servicing / leading a growth in demand from Scottish residents for home port facilities to servicing a growing volume of visitors, many from overseas. The North is characterised by a significant proportion of demand that emanates from visitors from outside Scotland notably other Northern European demand generating sources rather than the UK and Eire that forms the majority of demand in the West. This overseas demand is notably present in Orkney and Shetland waters.

In terms of home port / resident moorings the ports / marinas of the Inverness and Moray Firth area are growing as population, local economies, and boat ownership in this part of Scotland has grown, fuelling demand for more sailing facilities.

As the home port / marina berthing capacity and boat ownership have increased in the area so has the pressure on ‘sail to’ and ‘sail through’ facilities. Future growth in demand is anticipated overall at levels that are perhaps more modest than in the Clyde and West but none the less suggests the need for more facilities in future. Growth in visitation from outside Scotland is however impressive in base terms. Modelling of the future position suggests the following.

Table 61

THE NORTH BERTHS – STRATEGIC PLANNING TARGETS
(Supply Gaps Anticipated if Growth Returns to the Market)

Timeframes	Additional Resident Berths and Commercial Moorings Required	Berths for Visitors Required	Additions to Current Stock Required	Potential New Stock Levels
5 Years (by 2014)	297	58	**355**	2,370
10 Years (by 2019)	739	149	**888**	2,904

Source: TRC

In Appendix VIII we provide a detailed breakdown of the number of new berths with planning permission / rumoured or aspirational in the pipeline in the North.

Projects identified by this study as being in the pipeline / rumoured suggests that development of 800 new berths is under consideration. However, of these new berths currently being discussed, two locations Buckie and Whiteness on the Moray Firth are responsible for circa 750 of these berths. These berths forming a significant component of the future total ‘need’ identified but they will be more ‘home ports’ for resident boats in a very tight geographic location. This is in contrast to the identified future need for visitor berths at ‘sail to’ and ‘sail through’ locations. These forms of development are needed to fuel the continued health of the marketplace and provide new sailing itineraries / routes that will link Orkney and Shetland down into the Moray Firth / Inverness and the Caledonian Canal. The canal important as an access for many to the sailing grounds of the West Coast. Creation of new routes, using new visiting berths, is a strategy aimed at encouraging new visitors into the area.

The challenge in the North will be to see development over the years of strategic hubs and clusters of visitor moorings – a situation not dissimilar to the West. The home port issues will potentially be solved with a limited number of commercially-driven marina developments taking place near the main centres of population in the area ie Inverness. The visiting facilities or 'string of pearls' re sailing itineraries focused around ports of call for visitors, is a more difficult problem to solve given the sensitivity of seasonality in the local market and the commercial returns that can be made on investment in new visitor berths. Strategic locations for such development are considered to be: Lochinver, Kinlochbervie, Scrabster, Wick, Helmsdale, Kirkwall / Stromness, Lerwick and locations in the Cromarty Firth. Each of these locations needs to be assessed further on its own merits and the area evolve its own development strategy involving a range of prioritised development projects along lines not dissimilar to those established for the West Coast and the Clyde.

The North presently has no 'collectives' or industry-led groups like Sail Clyde driving or coordinating operators / destinations. However, a significant number of boat berthing facilities are owned and operated by Highland Council a significant 'industry' player. Key targets for the area in future are seen as being the important overseas visiting craft. Again, there could be merit in employing the Sail Clyde model as a coordinating influence in the short to medium term.

7.7 <u>The East</u>

The East of Scotland sailing area as adopted by this study could be seen to be, to an extent, very two dimensional and lacking the appeal of other parts of the Country. The geography of the sailing grounds of the area is by its nature limited to day sailing or trips up and or down the North Sea coast. In the main the sailing grounds are currently used by those who have boats permanently moored in the area attracting only modest numbers of visiting craft from outside Scotland or other parts of Scotland (see access issues etc).

The East has the lowest number and concentration of resident berths / boats and the smallest number of visiting boats. This is considered to reflect the quality of sailing on offer and the sailing opportunities that necessitate a move by boat owners either North or South from their home ports with little opportunity for trips that open up different vistas and destinations without longer sailing times than can be achieved in other parts of Scotland.

Many boat owners in the East keep their boats in the West where the sailing product is considered to be far superior. That said, there is still a core market in the East of individuals who want to keep a boat 'close by' their home and others who will base themselves in the East as they prefer the sailing. Concentration of supply is near to the main conurbations on the East notably near Aberdeen and on the Forth near Edinburgh (the noticeable absence being supply / ownership in the Tay around Dundee).

The marketplace / ownership levels and visitation levels are currently much lower in the East but research still suggests that in happier economic times growth is likely to be experienced albeit at levels lower than the main destinations of the Clyde and the West. The level of growth anticipated suggests a need for the following infrastructure in the future.

Table 62

THE EAST BERTHS – STRATEGIC PLANNING TARGETS (Supply Gaps Anticipated if Growth Returns to the Market)				
Timeframes	**Additional Resident Berths and Commercial Moorings Required**	**Berths for Visitors Required**	**Additions to Current Stock Required**	**Potential New Stock Levels**
5 Years (by 2014)	176	3	179	1,726
10 Years (by 2019)	426	7	433	1,980

Source: TRC

In Appendix VIII we provide a detailed breakdown of the number of new berths with planning permission / rumoured or aspirational in the pipeline in the East.

The gaps in provision and future requirements are much more modest when viewed against those of other areas and the national picture and the economic potential of the area lower in the sailing tourism sector. Research suggests almost 300 berths already have planning permission for development and a further 250 berths are aspirational / rumoured. This, when set against projections of future need at between 200 and 400 berths in the five to 10 year timeframe, suggests a notional balance could be achieved in the marketplace if the current projects were to proceed.

Analysis by the team suggests, that in the East the commercial sector is likely to evolve products to meet the local / mainly Scottish demand for resident berths in the future. The issue of visitor berths in the East is also considered to be a mainly domestic one in the future with most visiting craft to the various locations on the coast generated by boats from within the same sailing area. The strategic rationale then for development on this coast in commercial or economic terms is much less acute than anywhere else in Scotland. The East is, in the main, populated by local boat owners and services a local market.

Development in the area, whilst a benefit to local enthusiasts, is likely to be of limited value in generating additionality or diversifying economic activity in fragile rural economies when compared to other parts of Scotland. A Sail Clyde-type group could however enhance the chances of development proceeding where the market would like development to take place. This area is not seen as being strategically important for Scotland in the external non-Scottish 'resident' / home port market or the non-Scottish visiting craft market when compared to other location in Scotland.

7.8 Market Saturation

The consultants were tasked with considering the issue of 'market saturation' viz the level of development being considered / recommended and coming forward from the industry. Due consideration of these issues when referenced to each of the sailing areas suggest that saturation of the marketplace by development of the product is not an important issue at this time.

At present only 0.16% of the Scottish population owns a boat of relevance to this study. In the future if new berths and moorings are added as suggested, the penetration rate amongst Scottish residents increases to 0.19% in five years time. It is the consultants' opinion that this is still well below what may be considered the level of market saturation. In Orkney for example, which is a captive market 0.6% of the local population owns a boat.

7.9 Conclusion / Framework Focus and Prioritisation

The preceding clearly indicates that in both market and development terms Scotland cannot be viewed as a homogenous sailing destination / economy. The issues affecting each of the main sailing areas and their potential to make an improved contribution to the sailing tourism sector and the national / regional economies of relevance vary dramatically.

What evolves from this discussion of 'framework' is that the sailing tourism sector needs to evolve a development strategy that has a geographic focus and development priorities in the future. The various development strategies evolved for each area then need to consider the individual projects and locations and prioritises each on whatever basis is deemed appropriate at the time (such work has not been carried out in any depth by this study but appraisal of individual projects, their viability, sustainability and contribution to GVA will need to be assessed at the appropriate time).

In summary the recommendations of this study are that the focus of future development should be in the Clyde and the West, the aim to provide more ‘home port’ residential berthing for Scottish markets and more importantly markets from outside Scotland. In the West in particular an emphasis also needs to be given to the creation of strategic hubs / clusters of berthing to service the visiting markets from outside and inside Scotland to provide sailing / cruising itineraries and enhance the quality of the sailing product at the same time ensuring growth in the economy and distribution of economic benefit to many fragile rural disadvantaged areas.

In the North the emphasis in future needs to be on the creation of a ‘string of pearls’ and visitor nodes to encourage sailing itineraries in the area and attract more foreign boats and others. Any focus on the East in the future will be less important with local market conditions and developments primarily influenced by a very local domestic market suggesting less opportunity exists in national strategic terms – conversely as in other areas see the impact development could have on local regeneration strategies eg Leith – however the additionality / GVA at the national level potentially less than can be achieved by investment in other areas.

At this time this study has not considered individual projects in any great detail as each has to be assessed on its own merits viz cost of development, environmental sustainability and social issues alongside the economic advantage to be gained. However at a national strategic level, the focus of development and types of development in each area has generally been discussed and prioritised.

In the final analysis it is obvious each of the areas (Clyde, West, North and East) need to evolve their own detailed Sailing Tourism Development Strategies. In the Clyde this has already been created, in the main, by the Sail Clyde industry-led group, a public / private working partnership of operators and agencies coming together to agree a strategy and action plan for sailing in the area. This action plan has now evolved a set of key priorities / actions for the group in promoting development of the sector in the Clyde. As such Sail Clyde has evolved as an industry-led delivery vehicle / body fostering development. This could provide a model for the rest of the Country and is well in keeping with the new nine key step product development process being progressed by SE – part of its Product Delivery Strategy. This Group a model for the other sailing areas. Consideration may also be given to creating some form of national co-ordinating / lead body for the sector.

At the appropriate time a decision needs to be made whether in effect sailing as an ‘emerging product’, in terms of SE’s product portfolio, is considered suitable to join the stable of strategic products given the impact it can help make to the economy via improved GVA.

The table below is presented merely for discussion by those with a vested interest in the sector. At this time the table seeks to inform the framework debate by considering the relative strength each area has in terms of the markets and the economic benefit / importance that should be afforded each potentially in the future re investment and promotion by the industry and agencies.

Table 63

RELATIVE STRENGTH OF FUTURE MARKET / ECONOMIC OPPORTUNITY (Targets and Priorities for the Future)

Area	Resident Home Port / Berths		Visitor Berthing / Visiting Boat Nights	
	Scottish Owned Boats / Scottish Markets	Non-Scottish Owned / Tourist Boats	Scottish Boats	Non-Scottish Owned / Tourist Boats
Clyde	High	High	Medium	Medium
West	Medium	Low / Medium	High	High
North	Low / Medium	Low	Low / Medium	Medium
East	Low	Low	Low	Low

8 ADDITIONAL STUDY ELEMENTS

8.1 Introduction

As part of the commission consultants were asked to address a number of other issues related to the sailing tourism sector. These included providing:

- Comments on the event opportunities linked to sailing tourism;
- Comments on innovative technologies / manufacturing opportunities and business development opportunities / spinoffs that research might uncover and could be supported by the sector;
- Comments on skills issues in the sector and amongst service partners;
- A database of key organisations involved within the sector.

We provide below comments and data on each.

8.2 Event Opportunities

During the course of the baseline study the team paid due cognisance to the 'event' sector as it impacted on the sailing tourism sector (however, the impact of events on the sailing tourism economy was not assessed as part of the baseline). The consumer research phase of the study was in fact supported by the organisers of the well-known 'West Highland Week' event who distributed questionnaires to participants.

Events of various types and sizes already take place in Scotland in the sailing tourism sector but the team were asked to identify where any significant, new, opportunities might lie in the future. In considering the future the 'types' of event opportunities have to be considered in light of the 'goals' being established for the events. At danger of being obvious, but to inform the debate at the outset, it is important when considering new events for Scotland to identify what is the 'aim' of staging the event. There can be two outcomes to an event and often one can be much stronger than the other ie events can either be targeted at generating economic benefit (note additionally) or be marketing tools to raise awareness of destinations / causes etc. Often they are a mixture of both.

Actual events / themes staged can be ‘home grown’ ie are newly created by the host destination or are those that are regularly staged in a destination / around an anniversary etc. Conversely others are itinerant events that are built around a theme / activity or competition that looks for suitable host location [event organisers seeking out locations that will provide ‘subvention’ or ‘support’ to the event (financial or in-kind) or those that offer a particular advantage of some kind to the event organiser / governing body of the sport etc].

Events in sailing as in other spheres of sporting activity can either be those considered competitive in nature or leisure-based – these broad classifications can be used to describe the many strategic events already taking place in the Scottish calendar and provide potential pointers for the future.

The team have given some early consideration to ‘event’ and ‘event product’ development for Scotland. These are discussed below. The themes are presented not as definitive targets for the future but as possible themes for the future. The creation of a sailing events strategy must remain an aspiration of later pieces of work that may emerge from this baseline study.

Existing event products in the sector include the itinerant Tall Ships event that has visited Scotland in the past and is scheduled to do so again. Home-grown products like the larger scale ’Classic Malts’ and ‘West Highland Week’ joining the grouping. These are in part leisure events with a competitive edge with the markets more about ‘cruising in company’ (see later product development recommendations). Other home-grown events are more ‘rally’ in nature including the Fife regatta.

In future other home-grown events could evolve. However, the climate at present for the creation of new home-grown event products at a significant or large scale is extremely difficult and is unlikely to happen in the medium term. This suggests that a medium-term focus on attracting new itinerant events and possibly the creation of more modest scale home-grown products would be the most pragmatic option.

When targeting larger scale itinerant events in future it becomes necessary to consider not just the sailing environment but the ‘infrastructure’ needs of events and whether Scotland, as the host location, could cost-effectively meet the requirements of event organisers.

Bearing these issues in mind suggests that a number of itinerant events of a certain scale and type could be hosted by Scotland in the future. Other more modest scale home-grown events / new products are considered to be the most pragmatic event development opportunities worthy of following up in the medium term. The following are preliminary suggestions for future consideration / follow-up.

Itinerant events that are larger, prestigious and could be potential targets include the following:

Table 64

ITINERANT EVENTS	
Type / Source	**Comment**
ISAF	Sailing 'World Cup' event that takes place in numerous locations across the world (Scotland potentially could host competitions for particular classes of vessels)
Port of Call Events	Scotland could target itinerant events that require 'port of call' facilities eg Volvo Ocean Race (Similar to Tall Ships)
Classic Yacht Rallies	Various Sources

8.3 Home Grown Events / New Products

Review suggests that in the home-grown events market opportunities surround not so much the creation of new 'large scale' events as such but 'new products'. These products in themselves are almost events and borrow and use formulae that have proved successful already in Scotland and elsewhere, albeit providing events of a more modest scale. These product / event opportunities could be progressed by the commercial / club sector and others.

New Event / Products could include:

- Developing Flotilla Sailing (events);
- Creating 'cruising in company' networks / themes (see below);
- Creating 'themed' cruising routes / networks and locations viz wildlife, geology, history, golfing etc;
- Classic yacht rallies / 'musters' for leisure craft.

The above to be afforded more consideration in due course.

8.4 Innovative Business Concepts / Manufactured Product Opportunities

The teams were asked at the outset to be on the lookout and aware of any business / product development opportunities related to the sailing tourism sector that the study might ‘throw up’. However, the study confirmed that these were in the main of a ‘service’ nature rather than a technical or manufacturing component nature. The hope was to establish some areas of linked manufacture / products that might be worthy of some further consideration as they provide ‘related’ business / manufacturing opportunities for Scotland that are linked to the sailing economy.

Unfortunately in the marine tourism sector at this time our discussions with the BMF suggest that there is little of a manufacturing / niche product base within the Scottish economy that could capitalise at this time in any meaningful way. The main opportunities at this time are seen as being in the service sector.

8.5 Skills Issues

The nature of this study was not an audit of skills needs or training gaps within the sailing tourism sector but the consultants were asked to give feedback on any strategic findings made during the course of the study. We present our findings below:

i) Skills Needs within the Marine Sector

Skills in the wider marine sector have been an issue. However, this is an area that has received recent attention by the BMF in tandem with Skills Development Scotland and a strategy to address some of the shortcomings / gaps re provision and access to training etc has been developed and delivery moving forward.

ii) Associated Services Sector / Skills Issues

The ‘sailing tourism’ product covers many aspects and components of the sailing and hospitality industries and it is difficult within the confines of a study such as this to be other than generalist when it comes to passing comment on the strategic issues surrounding skills.

As indicated previously the BMF and SE are already discussing and addressing the more specific issues surrounding technical skills in the marine industries sector. When it comes to the linked or related areas of the sailing tourism product viz hospitality, food and beverage, retail and the issues of skills therein, these are no different than those for the general marketplace. Scotland exhibits centres of excellence as well as areas where vocational skills and customer care skills are lacking. These issues reflect in the local-based facilities offered by many host locations.

This study cannot make any further comment other than to say that raising awareness of the needs of sailors / visiting boats and the commercial opportunities they offer land-based businesses is perhaps an area where dissemination of data (particularly the commercial spend data included in this study) would encourage more to take a proactive approach to servicing the needs of the sailing tourism sector. In terms of skills it is as much about raising the understanding of the profile and scale of the opportunities arising from the sector and ensuring in each destination the business skills and right quality and range of services / provision is ultimately delivered. This suggests the need for all forms of business skills to be nurtured in host destinations. (See the ongoing activity of HIE and SE in this respect via Account Managers and other in-house business support initiatives). Skills and business development initiatives being implemented across Scotland should therefore ensure that the sailing dimension and the needs and aspirations of sailors / visitors are considered.

8.6 Database of Key Organisations

Presented in the Appendices and provided in electronic format to Scottish Enterprise is a database of the key industry operators contacted during the course of the study. In addition others with a vested interest in the sector who took part in the consultation process are identified.

This list includes:

- Marina / boating operators;
- Harbour and community trusts;
- The Crown Estate;
- Charter operators;
- A range of others of note.

See Appendix V.

9 CONCLUSIONS, RECOMMENDATIONS AND AREAS FOR FURTHER CONSIDERATION

9.1 General Overview

This national review of the Sailing Tourism sector highlights an industry sector that until recently has grown continually over the last decade and a half with new facilities and commercial provision being absorbed by the market. The recent economic downturn is reported, anecdotally, to have seen growth slow but there is no apparent major downturn evident within the sector though there are claims that boat owners are delaying certain items of significant expenditure. It is impossible to comment on the recent changes in any detail however as no previous economic baseline of the sector nationally has been completed. This report has now completed that task.

The table below highlights the current supply and demand dynamics evident across Scotland.

Table 65

SUMMARY OF CURRENT SUPPLY AND DEMAND (Resident and Visitor Berthing)

Area	Resident Berths & Moorings Available (All Types)	Total Resident Boat Demand	Visitor Berths & Moorings Available	Total Visitor Night Demand (inc Drop Anchor)
Clyde	4,727	4,438	644	49,289
West	3,046	2,885	621	95,970
North	1,746	1,693	270	15,935
East	1,399	1,399	148	6,458
TOTALS	**10,918**	**10,415**	**1,684**	**167,652**

The pre-eminence of the Clyde as a base for home port berthing and the West as the centre of visiting boat activity is clearly demonstrated. The West of Scotland, the hub of the sector and the part of Scotland offering the greatest potential in the future in all sectors – resident and visiting boats.

Detailed analysis of the origins of home port berthing in Scotland indicates that certain types of berthing operations in the Clyde have almost 30% of their home port berths occupied by people resident outside Scotland.

In the West Coast the figure is also significant, as a result contributing additionality to the Scottish economy. This, in turn, suggests a potential future geographic focus for activity / development if the returns and economic activity at a national level are to be optimised.

Estimates of future impact that could be created in the future if growth returns in the medium-term future have been made. However, if this growth is to be achieved it calls for the creation of new infrastructure to service the new demand that will be generated. If this can be successfully achieved, estimates suggest GVA from the sailing tourism sector in the five to 10-year timeframe could grow to levels of £61.6 million and £76.1 million respectively.

The current and future economic positions are summarised in the table below. If the future aspirations are to be achieved a number of issues and factors need to be considered and addressed, in the consultants' opinion. These are discussed in the following section.

Table 66

SUMMARY – TOTAL MARKET		
Activity	**Total (Activity by Scottish and Non-Scottish Boat Owners)**	**Tourist (Activity by Non-Scottish Boat Owners Only)**
Current		
Expenditure	£101.3 million	£27.0 million
Employment (FTEs)	2,732	724
GVA	£53.0 million	£14.0 million
5 Years (Increase)		
Expenditure	£16.2 million	£5.6 million
Employment (FTEs)	444	152
GVA	£8.6 million	£2.9 million
10 Years (Increase)		
Expenditure	£43.7 million	£15.5 million
Employment (FTEs)	1,191	421
GVA	£23.1 million	£8.2 million
5 Years (Current plus increase)		
Expenditure	£117.5 million	£32.5 million
Employment (FTEs)	3,176	876
GVA	£61.6 million	£17.0 million
10 Years (Current plus increase)		
Expenditure	£145.0 million	£42.5 million
Employment (FTEs)	3,923	1,145
GVA	£76.1 million	£22.2 million

Table 67

SUMMARY – NET ADDITIONAL INCREASE		
Activity	**Total (Activity by Scottish and Non-Scottish Boat Owners)**	**Tourist (Activity by Non-Scottish Boat Owners Only)**
Current		
Expenditure	£101.3 million	£27.0 million
Employment (FTEs)	2,732	724
GVA	£53.0 million	£14.0 million
5 Years (Net Additional Increase)		
Expenditure	£8.8 million	£5.6 million
Employment (FTEs)	240	152
GVA	£4.7 million	£3.0 million
10 Years (Net Additional Increase)		
Expenditure	£24.0 million	£15.5 million
Employment (FTEs)	652	421
GVA	£12.7 million	£8.2 million
5 Years (Current plus net additional increase)		
Expenditure	£110.1 million	£32.5 million
Employment (FTEs)	2,972	876
GVA	£57.7 million	£17.0 million
10 Years (Current plus net additional increase)		
Expenditure	£125.3 million	£42.5 million
Employment (FTEs)	3,384	1,145
GVA	£65.7 million	£22.2 million

The potential net additional expenditure increase has been estimated at £24 million (of which £15.5 million would be from non-Scottish owned boats). The net additional increase in employment is estimated at 650 with GVA of £13 million.

9.2 Recommendations and Issues for Further Consideration

This report includes a ‘development framework’ that profiles the strategic infrastructure needs / developments required in each of Scotland’s four sailing areas if the future potential is to be unlocked and capitalised upon. Within that framework certain strategic priorities are suggested at this time. These revolve around adopting a strategic focus for future development in geographic terms. The findings point to the Clyde and West, to a lesser extent the North, and the East less so as the key geographies offering future opportunities. Within these geographic foci there are regional variations in the type of facility provision required and issues that need to be addressed.

The scale / profile of development in each area is rehearsed in the framework and the suggestion is made that 'industry groups' might be formed in each area using Sail Clyde as a model to help facilitate and progress 'on the ground' product development.

How and which individual projects ultimately proceed is the next question to be answered. The development needs for each of the sailing areas have been identified and guidance has been provided for the future. A strategy for each area and the sector in general now needs to be evaluated by all with a vested interest in its future. At the appropriate time the technical, financial and environmental sustainability of each individual development project also needs to be considered prior to proceeding. The industry-led delivery process itself, also one for further discussion by all those with a vested interest.

The scale of the opportunity afforded by the sector at a strategic level has been modelled. The findings now need to be considered by SE and others and the decision made as to whether Sailing Tourism is adopted as a fully fledged member of SE's Tourism Products Portfolio.

In conclusion, the team propose the following issues should be considered further if Scotland is to move its sailing tourism sector to the next level.

Development Strategy and Lead Body / Delivery Model

The sector may need to evolve some form of industry-led body at a national level that, in turn, can help evolve and prioritise a national development strategy for the sector acceptable to all parties. (Sail Clyde may already offer a model as it already brings together industry operators, public sector agencies eg SE, Councils, VisitScotland, etc. A Cross-Party Group for the marine sector now also exists within Holyrood).

This research document now forms a rich source of data and information on the sector and can be used to inform all those with an interest in the Sailing Tourism economy. Consideration should now be given to how best to distribute the findings to the widest audience. One such vehicle may be to use Tourism Intelligence Scotland.

Market Opportunities and Promotion

There are two very distinct 'markets' for the sector that will see the need in future for innovative targeted marketing and promotional strategies. The resident berthing sector and visiting boats can both provide considerable economic benefit in the future.

Across the Country, the various sectors display differing levels of benefit in terms of generating activity by Scottish and non-Scottish boat owners in different parts of the Country. Analysis suggests that in particular equal 'additional' benefit might be achieved from the 'tourist markets' by attracting both new resident boats and visiting boats into the Country. This sees the need for the industry and the Agencies ie operators, VisitScotland and others, to evolve promotional and marketing strategies for different markets with differing messages. These will range from encouraging 'boat owners' to basically take up a holiday / leisure or second home residence in Scotland on a permanent basis by encouraging resident berth uptake. In turn spending their tourist pounds in a way not dissimilar to those with holiday homes in Scotland. In tandem others need to be targeted to visit Scotland with their boats as part of a cruising holiday itinerary in the way others are targeted to undertake touring holidays in Scotland. This form of visitor bringing their 'accommodation of choice' with them is not dissimilar to visitors touring with motor homes / caravans etc albeit expenditure levels are considered to be higher.

These factors see the need for prioritisation and targeting of development and future promotion and marketing to be considered at a higher and wider level including the trade, VisitScotland and other Agencies (See earlier Section 7.9 Framework Focus and Prioritisation).

Addressing the Competition

Case study lessons are available and indicate that strategic planning targets are required if success is to be achieved. Recent studies are available highlighting the strategic policies adopted by other countries like Mexico and Cyprus. In Mexico a national development strategy, known as Escalera Nautica' (Nautical Ladder), has evolved that is driving the creation of 'sail from', 'sail to' and 'sail through' marinas on the Baja California Peninsula. This strategy aiming to attract lucrative demand for home port facilities and visiting craft from the North American market.

In the European context, Cyprus has also evolved a strategy to create new key home port marinas, as well as new facilities for visiting craft cruising in the Mediterranean. The aim being to attract new demand into its economic sphere of influence.

These developments and others merely reflect the importance others are giving to the sailing tourism sector. This in itself is adding to the supply and competition in the international market. Similarly, in the UK many areas are creating new sailing tourism infrastructure / marinas as a means of generating / attracting increased tourism market share. Development by other destinations in the UK is seeing direct competition for Scotland grow.

It is considered Scotland will continue to have certain advantages in the UK marketplace but it cannot become complacent and will need to work to ensure it can maintain and grow its current market share in the future. This sees the need for attention to be paid by the sector to the infrastructure needs of the market as well as the promotion of the destination product in the future. Attention to these primary issues will be a matter of importance if success is to be achieved.

9.3 In Summary

It is hoped this report provides valuable information and market intelligence on the sailing tourism sector that will open up the debate as to what the future might hold. Decisions need to be made as to the strategic direction that should be adopted if the current levels of demand and economic benefit are to be maintained and grown. How that will be achieved is now the topic of the moment for all those with a vested interest in the sector.

EXHIBIT I

GLOSSARY OF TERMS

GLOSSARY OF TERMS

Resident Boats / Resident Berths

Refers to boats that are moored by their owners in Scotland ie utilising a berth or mooring as the vessel's 'home port'. Resident berths those that host resident boats as opposed to visiting craft. These include berths and moorings in formal commercial facilities eg marinas etc as well as private moorings laid down by individuals / trusts and community groups on the licensed seabed (See Crown Estates' management of the same).

Nationality of Boat Owners / Vessels (Resident Boats Resident Berths)

A boat 'resident' in Scotland is owned by either a Scottish domicile or an individual who is non-Scottish ie they are domiciled outside Scotland. This provides two classifications of 'resident' boats. Scottish and non-Scottish (the latter considered 'tourists' see the Economic Impact Assessment).

Visiting Berths / Visitor Boat Nights / Drop the Anchor

'Berths' as are available to those visiting Scottish Waters / facilities that are not their 'home ports'. Berths can be made available in marinas / harbours or swing moorings.

The level of visiting craft to Scotland and the various sailing areas has been measured using 'Boat Nights' as the preferred measurement category ie the number of nights spent by a boat berthed at individual locations.

In many locations across Scotland research indicates visitor berths can often be full seeing a need for visitors to 'drop anchor' to moor overnight. In other locations / instances many 'drop anchor' through preference. As the terminology suggests this is the vessel using its own anchor to provide overnight / tie up of the boat.

Nationality of Visiting Boats / Bednights Generated

The study divided the 'demand' from visiting craft into boat nights that are generated by those vessels from Scotland and those from outside Scotland ie non-Scottish Boats (or tourists – See Economic Impact Assessment).

Mooring / Berthing Designations

'Sail From'	-	Those that are clusters of the main 'home port' facilities that generate sizeable numbers of Scottish visiting boats to other sailing areas / visitor berths.
'Sail To'	-	Destinations that are classified or considered anecdotally to be Scotland's main sailing destinations' for many in the market, providing an end port to a cruise, holiday, break itinerary. (It will also be a home port for some, and a sail through. See below port for others).
'Sail Through'	-	A classification used by many in the sector to describe 'parts' locations that many pass through en route elsewhere as part of a sailing trip itinerary. Here again this may be a view held by a large percentage of the market but to others sail through can be a home port or sail to destination.

APPENDICES

I	Resident and Visiting Craft Consumer Survey
II	Operator Survey – Interview Aide Memoire
III	Non-Scottish Marina Consumer Survey
IV	Charter Hire Survey – Interview Aide Memoire
V	Consultations Database
VI	Sail Clyde Action Plan
VII	Excerpt from EKOS's and TRC's West Highlands Sailing Study – Green and Amber Development Projects
VIII	Planned / Proposed Developments Identified by this Study
IX	Bibliography

APPENDIX I

Resident and Visiting Craft Consumer Survey

TOURISM RESOURCES COMPANY

Management Consultancy and Research Services

2 LA BELLE PLACE, GLASGOW G3 7LH
Tel: 0141-353 1143 Fax: 0141-353 2560
Email: info@tourism-resources.co.uk
www.tourism-resources.co.uk

SAILING TOURISM IN SCOTLAND

Tourism Resources Company, the British Marine Federation and Ekos have been commissioned by Scottish Enterprise, on behalf of the Scottish Government, to carry out the first national survey into the sailing and leisure boating sector in Scotland. We are seeking your help in gathering information on the market and issues affecting its future success. The aim is to find ways that the industry can be helped to grow, prosper and increase its contribution to the Scottish economy.

Attached is a questionnaire which we hope you will find time to complete and return to us in the freepost envelope provided. (An online version is also available, if that is more convenient for you, and can be accessed through the following link: **http://www.ekosonlineresearch.co.uk/sailing.htm**).

By way of thanks, completed questionnaires will be entered into a prize draw for £100 worth of Amazon or Marks and Spencer vouchers.

Thank you for your support.

1.	How did you receive this questionnaire? Please tick	Emailed		
		Home Marina (Please name)		
		Port of Call (Please name)		

2.	Month of Completion	
	Country of Residence	
	Post / Zip Code	

3.	Do you own a boat?	Yes ☐	No ☐ **(If no please go to question 23)**				
4.	Do you have a boat moored in Scotland?	Yes ☐	No ☐				
5.	Is your boat power or sail?	Power ☐	Sail ☐				
6.	Size of your boat in metres?	<5m ☐	5-8m ☐	9-12m ☐	12+m ☐		
7.	Where is your boat normally 'permanently' moored during the summer and winter?	Summer					
		Winter					
8.	What type of berthing do you use during?		Marina Berth	Marina Mooring	Swing Mooring	Harbour	Storage on Land	Other
		Summer						
		Winter						
	If other, please specify							
9.	Approximately how far in miles is your permanent resident mooring from your home?	**Summer Months**					
		0-20 ☐	21-50 ☐	51-100 ☐	100+ ☐		
		Winter Months					
		0-20 ☐	21-50 ☐	51-100 ☐	100+ ☐		

If you do not have a boat moored in Scotland, then please go to question 23, for those that do have a boat moored in Scotland, please continue with question 10.

<table>
<tr><td rowspan="11">10.</td><td rowspan="11">Approximately how much do you spend per annum on your boat / activities (including trips away) on the following:</td><td>Category</td><td>Spend (£)</td></tr>
<tr><td>Berthing Fees</td><td>£</td></tr>
<tr><td>Fuel</td><td>£</td></tr>
<tr><td>Repairs / Maintenance / Parts (Inc. Chandlery, Launching and Hoisting)</td><td>£</td></tr>
<tr><td>Food & Drink on board</td><td>£</td></tr>
<tr><td>Food & Drink ashore</td><td>£</td></tr>
<tr><td>Accommodation</td><td>£</td></tr>
<tr><td>Entertainment & Leisure (Inc. trips to visitor attractions, sports, etc)</td><td>£</td></tr>
<tr><td>Other Retail</td><td>£</td></tr>
<tr><td>Transport (to and from mooring)</td><td>£</td></tr>
<tr><td>TOTAL</td><td>£</td></tr>
<tr><td>11.</td><td>On how many days a year do you typically visit or use your boat (both at its berth / mooring and taking trips away)?</td><td colspan="2">Number of Days</td></tr>
<tr><td rowspan="5">12.</td><td rowspan="5">In the average year how many times would you go for the following type of trip in Scotland?</td><td>Usage in Scotland</td><td>Number of Times</td></tr>
<tr><td>Just Visit (boat does not leave berth)</td><td></td></tr>
<tr><td>Day Cruise</td><td></td></tr>
<tr><td>Short Cruise (1 – 2 nights)</td><td></td></tr>
<tr><td>Longer Cruise (>2 nights)</td><td></td></tr>
<tr><td>13.</td><td>On average what is the duration, in nights, of a longer cruise in Scotland?</td><td colspan="2">Number of Nights</td></tr>
<tr><td>14.</td><td>In the last 3 years have you made any trips outside Scotland?</td><td colspan="2">Yes ☐ No ☐</td></tr>
<tr><td>15.</td><td>In the last 3 years how many times have you gone on a longer cruise, more than 2 nights, outside Scotland?</td><td colspan="2">Number of Times</td></tr>
<tr><td>16.</td><td>On average what was the duration, in nights, of this / these longer cruise(s) outside Scotland?</td><td colspan="2">Number of Nights</td></tr>
<tr><td rowspan="2">17.</td><td rowspan="2">What would encourage you, if anything, to spend more money on the following:</td><td>Your Boat</td><td>Trips Away</td></tr>
<tr><td></td><td></td></tr>
<tr><td>18.</td><td>Are you satisfied with your current mooring / berth?</td><td colspan="2">Yes ☐ No ☐</td></tr>
<tr><td>19.</td><td>If no, why not?</td><td colspan="2"></td></tr>
<tr><td>20.</td><td>Are there any additional facilities you would like at your residential berth / marina / harbour, if so please list?</td><td colspan="2"></td></tr>
<tr><td>21.</td><td>Is there another location in Scotland that you would like to have a resident berth / mooring, if so please name</td><td colspan="2"></td></tr>
<tr><td>22.</td><td>What is stopping you from mooring there?</td><td colspan="2"></td></tr>
</table>

We would now like to ask you some questions about your last sailing / motorised boat trip in Scotland. If this is the first time that you have taken a sailing / motor yacht trip in Scotland, then please provide anticipated details for this trip.

23.	On your last trip did you use your own boat, a friend's boat or charter a boat?	Own ☐ Friend's Boat ☐ Charter ☐	
24.	On your last trip how many people were in your crew / party (include self)?		
25.	What type of cruise was your last trip?	**Cruise Type**	
		Day Cruise	☐
		Short Cruise (1-2 nights)	☐
		Longer cruise (>2 nights within Scottish Waters)	☐
		Longer cruise (>2 nights, including destinations outside Scotland)	☐
26.	How long was your last trip in days?		
27.	On average, on your last trip how many nautical miles did you travel per day?		
28.	On your last trip what places did you visit? (Please list)		
29.	On your last trip from your home port how many times did you use...	Formal berthing / mooring / harbour facilities or:	
		Drop the anchor	
30.	Where there any times during your last trip that you would have liked to use formal facilities but could not?	Yes ☐ No ☐	
31.	If yes, please state the reason and location lacking the facilities		
32.	On your last trip, how much did you spend on the following:	**Category**	**Spend (£)**
		Berthing Fees	£
		Fuel	£
		Food & Drink on board	£
		Food & Drink ashore	£
		Accommodation	£
		Entertainment & Leisure (Inc. trips to visitor attractions, sports, etc.)	£
		Other Retail	£
		Boat Hire	£
		TOTAL	**£**
33.	What would encourage you to go on : **More Trips in Scotland**		
	Longer Trips in Scotland		
34.	What are the best aspects of sailing / boating in Scotland?		
35.	Are there any aspects of sailing / boating that could be improved?	Yes ☐ No ☐	
36.	If yes, please list		

If you do not normally have your boat berthed / moored in Scotland please continue with question 37. Otherwise, please go to question 40 if you would like to leave additional comments.

37.	Would you consider occupying a resident berth / mooring in Scotland?	Yes ☐ No ☐
38.	If no, why not?	
39.	If yes, are there any particular areas of Scotland that would appeal to you?	

40. Finally, if you have any further comments you would like to add, please do so below.

To be entered into the prize draw for the chance to win £100 of Amazon or Marks & Spencer vouchers please provide your preferred contact details (any information provided will not be shared with any third party):

PROJECT TEAM

TOURISM RESOURCES COMPANY

British Marine Federation

Scottish Enterprise

ekos Economic and Social Development

APPENDIX II

Operator Survey – Interview Aide Memoire

Name:	
Operation / Club / Cluster:	
Position:	
Tel No:	
Email:	
Website:	

Number of Pontoon Berths	Residential	Visitor		
Type of Pontoon Berths	Harbour Wall	Floating Pontoon	Pier	Other
Number of Moorings	Residential	Visitor		
Slipway	Yes / No			
Water & Fuel	Water alongside Diesel alongside	Yes / No Yes / No	Petrol alongside Bottled Gas	Yes / No Yes / No
Additional Facilities	Toilets Showers Changing facilities	Yes / No Yes / No Yes / No		

RESIDENTS

1)	**What are the current resident tariffs?**	6 months summer		6 months winter		12 months	
		Pontoon	Mooring	Pontoon	Mooring	Pontoon	Mooring
2)	**How many resident boats are on:** **How many resident berths do you fill during a typical season?**	6 months summer		6 months winter		12 months	
		Pontoon	Mooring	Pontoon	Mooring	Pontoon	Mooring
		TOTAL		**Pontoons**		**Moorings**	
3)	**What proportion of resident boats are:**	**Size**			**%**		
		Under 5 metres					
		5 – 8 metres					
		9 – 12 metres					
		12+ metres					
4)	**What proportion of resident boats are:**	Power			Sail		
5)	**Is there currently a waiting list to secure a resident berth, if so how long / how many craft?**						
6)	**Has demand decreased as a result of the recession, if so by how much?**						
7)	**Boat Owner place of origin:**	**Category**				**% of Demand**	
		Scotland					
		Other UK - England					
		Wales					
		N. Ireland					
		Overseas Inc. Ireland					

VISITORS

1)	**Approximate visiting craft numbers:**	**Craft**	**Overnights**
	2008		
	2007		
	2006		
Note	Clarify that the visiting sailing season runs from Easter – October. It may be easier to ask for a weekly estimate of visiting boats rather than total numbers for the year.		
2)	**What is the current visitor tariff?** (If they quote a price per metre ask for the average size of craft)		
3)	**What is the average length of stay of visiting yachts in nights?**		
4)	**Has there been a significant change in the sector in the last 3 years?**	Yes ☐ No ☐	
	If 'Yes' which part of market and what do you think has caused this change?		
	Have visitor numbers decreased due to the recession, if so by how much?		
5)	**What proportion of visitor boats are:**	Power	Sail
6)	**Visitor origin of demand:**	**Category**	**% of Demand**
		Scotland	
		Other UK - England	
		Wales	
		N. Ireland	
		Overseas Inc. Ireland	
7)	**Are there ever occasions when visiting craft have to go elsewhere due to the facilities being at capacity?**		
8)	**Are there any future plans for renovation / increasing the capacity at the location? (Shore and Land based)**		
9)	**What do you consider to be the constraints of this location?**		
10)	**Do you consider there to be any issues / opportunities in the sailing region around you? If so what are they and how can they be addressed?**		
11)	**Have boats coming into the area encouraged any new innovative businesses / business ideas to emerge?**		
12)	**Do you have any other comments?**		

APPENDIX III

Non-Scottish Marina Consumer Survey

TOURISM RESOURCES COMPANY

Management Consultancy and Research Services

2 LA BELLE PLACE, GLASGOW G3 7LH
Tel: 0141-353 1143 Fax: 0141-353 2560
Email: info@tourism-resources.co.uk
www.tourism-resources.co.uk

SAILING TOURISM IN SCOTLAND

Tourism Resources Company, the British Marine Federation and Ekos have been commissioned by Scottish Enterprise, on behalf of the Scottish Government, to carry out the first national survey into the sailing and leisure boating sector in Scotland. We are seeking your help in gathering information on the market and issues affecting its future success. The aim is to find ways that the industry can be helped to grow, prosper and increase its contribution to the Scottish economy.

By way of thanks, completed questionnaires will be entered into a prize draw for £100 worth of Amazon or Marks and Spencer vouchers.

Thank you for your support.

1.	Country of Residence	
	Post / Zip Code	

2.	Is your boat power or sail?	Power ☐ Sail ☐					
3.	Size of your boat in metres?	<5m ☐ 5-8m ☐ 9-12m ☐ 12+m ☐					
4.	Where is your boat normally 'permanently' moored during the summer and winter?	Summer					
		Winter					
5.	What type of berthing do you use during?		Marina Berth	Marina Mooring	Swing Mooring	Harbour	Storage on Land	Other
		Summer						
		Winter						
	If other, please specify							
6.	Approximately how far in miles is your permanent resident mooring from your home?	**Summer Months**					
		0-20 ☐ 21-50 ☐ 51-100 ☐ 100+ ☐					
		Winter Months					
		0-20 ☐ 21-50 ☐ 51-100 ☐ 100+ ☐					
7.	Would you consider occupying a resident berth / mooring in Scotland?	Yes ☐ No ☐ **If Yes, go to Q9**					
8.	If no, why not? **Now go to Q10**						
9.	If yes, are there any particular areas of Scotland that would appeal to you?						
10.	Have you been on a sailing holiday in Scotland?	Yes ☐ No ☐ **If Yes, go to Q12**					
11.	If no, why not? **Now go to Q16**						
12.	If yes, on your last trip to Scotland, did you use your own boat, a friend's boat or charter a boat?	Own ☐ Friend's Boat ☐ Charter ☐					

13.	On your last trip to Scotland, what places did you visit? (Please List)	
14.	What are the best aspects of sailing / boating in Scotland?	
15.	What aspects of sailing / boating in Scotland could be improved?	

16. Finally, if you have any further comments you would like to add, please do so below.

To be entered into the prize draw for the chance to win £100 of Amazon or Marks & Spencer vouchers please provide your preferred contact details (any information provided will not be shared with any third party):

PROJECT TEAM

TOURISM RESOURCES COMPANY

British Marine Federation

Scottish Enterprise

ekos Economic and Social Development

APPENDIX IV

Charter Hire Survey – Interview Aide Memoire

Name:	
Organisation:	
Tel Number:	
Email:	
Operating Base:	

<table>
<tr><td>1.</td><td>How many boats do you operate?</td><td colspan="4"></td></tr>
<tr><td>2.</td><td>On average how big are your craft, in metres?</td><td colspan="4"></td></tr>
<tr><td>3.</td><td>Are they power or sail?</td><td>Power</td><td></td><td>Sail</td><td></td></tr>
<tr><td rowspan="4">4.</td><td rowspan="4">What proportion of charter weeks sold are to:</td><td colspan="2">Type</td><td colspan="2">% of demand</td></tr>
<tr><td colspan="2">Bareboat</td><td colspan="2"></td></tr>
<tr><td colspan="2">Skippered</td><td colspan="2"></td></tr>
<tr><td colspan="2">Other (Please Specify)</td><td colspan="2"></td></tr>
<tr><td>5.</td><td>For a bareboat charter what certificates / licences have to be presented before a craft is released?</td><td colspan="4"></td></tr>
<tr><td>6.</td><td>What is the average length of a charter, in nights?</td><td colspan="4"></td></tr>
<tr><td>7.</td><td>What is the average crew / party size?</td><td colspan="4"></td></tr>
<tr><td rowspan="5">8.</td><td rowspan="5">What months do the following cover</td><td>Season</td><td colspan="2">Time</td><td>Av Boat Occ</td></tr>
<tr><td>High</td><td colspan="2"></td><td></td></tr>
<tr><td>Medium</td><td colspan="2"></td><td></td></tr>
<tr><td>Low</td><td colspan="2"></td><td></td></tr>
<tr><td>TOTAL</td><td colspan="2"></td><td></td></tr>
<tr><td rowspan="5">9.</td><td rowspan="5">What is the average price for a week long hire during the following

Does that include VAT? Yes/No</td><td>Season</td><td colspan="2">Bareboat</td><td>Skippered</td></tr>
<tr><td>High season</td><td colspan="2">£</td><td>£</td></tr>
<tr><td>Medium season</td><td colspan="2">£</td><td>£</td></tr>
<tr><td>Low season</td><td colspan="2">£</td><td>£</td></tr>
<tr><td>Average for year</td><td colspan="2">£</td><td>£</td></tr>
<tr><td>10.</td><td>What does the skippered price include?</td><td colspan="4"></td></tr>
<tr><td rowspan="6">11.</td><td rowspan="6">Please indicate the nationality mix of your charter hire market (weeks sold generating source)</td><td colspan="2">Country</td><td>Bareboat % of demand</td><td>Skippered % of demand</td></tr>
<tr><td colspan="2">Scotland</td><td></td><td></td></tr>
<tr><td colspan="2">England</td><td></td><td></td></tr>
<tr><td colspan="2">Wales</td><td></td><td></td></tr>
<tr><td colspan="2">N. Ireland</td><td></td><td></td></tr>
<tr><td colspan="2">Overseas Inc Ireland</td><td></td><td></td></tr>
<tr><td>12.</td><td>What markets do your skippered charters cater for (ie wildlife, diving, general leisure cruising)?</td><td colspan="4"></td></tr>
<tr><td>13.</td><td>Where are your most popular sailing destinations for skippered boats?</td><td colspan="4"></td></tr>
<tr><td rowspan="2">14.</td><td rowspan="2">What is your level of repeat business?</td><td colspan="2">Bareboat</td><td colspan="2">Skippered</td></tr>
<tr><td colspan="2"></td><td colspan="2"></td></tr>
</table>

<table>
<tr><td>15.</td><td>Has there been any significant change ie increase / decrease, change in charter type, destinations in the past 3 years?

If ‘Yes’, what format has the change taken and what has caused this change?</td><td colspan="2">Yes ☐ No ☐</td></tr>
<tr><td>16.</td><td>Are you looking to expand the business in the next few years (more boats or new sailing destinations)?</td><td colspan="2"></td></tr>
<tr><td>17.</td><td>Do you think there are any market gaps / sailing opportunities under developed in Scotland?</td><td colspan="2"></td></tr>
<tr><td>18.</td><td>Are there any locations that you would like to use but are lacking in suitable facilities? What are these facilities?</td><td colspan="2"></td></tr>
<tr><td rowspan="5">19.</td><td rowspan="5">Approximately which turnover banding would apply to your business?</td><td><£25,000 ☐</td><td>£25k-£50k ☐</td></tr>
<tr><td>£50k-£100k ☐</td><td>£100k-£150k ☐</td></tr>
<tr><td>£150k-£250k ☐</td><td>£250k-£500k ☐</td></tr>
<tr><td>£500k-£750k ☐</td><td>£750k-£1mill ☐</td></tr>
<tr><td>£1mill-£2mill ☐</td><td>£2mill+ ☐</td></tr>
</table>

APPENDIX V

Consultations Database

SUMMARY OF CONSULTATIONS INFORMING THE STUDY	
Category	**Number of Interviews Concluded**
CLYDE AREA – Marinas, Harbours, Sailing Clubs, etc	34
WEST AREA – Marinas, Harbours, Sailing Clubs, etc	32
NORTH AREA – Marinas, Harbours, Sailing Clubs, etc	32
EAST AREA – Marinas, Harbours, Sailing Clubs, etc	12
Stakeholders	13
Council Planning and Regeneration Agencies	26
Sailing Training Organisations	3
Charter Hire Companies	18
Totals	**170**

OPERATOR AND AUDIT CONSULTATIONS (MARINAS, SAILING CLUBS, HARBOURS, ETC)		
CLYDE		
Operation	**Contact**	**Telephone Number**
Portpatrick		01776 810355
Stranraer		07734 073421
Largs		01475 675333
Troon		01292 315553
Girvan		01465 713648 or 07970844057
Irvine		0141 242 7900
Ardrossan		01294 607077
Fairlie Quay Marina		01474 521485
Kip		01475 521485
Bowling		01389 877969
Royal Northern and Clyde Yachting Club		01436 820322
Lamlash Harbour - Arran Yacht Club		01770 700463 or 01770 700353
Port Bannantyne		01700 502719
Dove Marine Limited		0191 232 5677
Sandpoint Marina		01389 762396
Kirkcudbright		01557 331135
Isle of Whithorn Harbour		07734 073420
Port William		07734 073419
Garlieston		07734 073422
Urr Navigation Trust		01556 610259
Tarbert		01880 820344
Lochgoilhead Jetty Trust		01301 703435
Holy Loch		01369 701800
Portavadie		01700 811075
Bute Berthing Company		01700 500630
Lochranza		01770 830247
Campbeltown Harbour		07798 524821
Millport		01294 225193 and 01294 225239
Brodick		01294 225193
Colintraive Hotel		01700 841207
An Lochan Hotel		01700 811239
Kames Hotel		01700 811489
St Blanes Hotel		01700 831224
Loch Fyne Oyster Bar		01499 600236

OPERATOR AND AUDIT CONSULTATIONS (MARINAS, SAILING CLUBS, HARBOURS, ETC)		
WEST		
Operation	**Contact**	**Telephone Number**
Tobermory		07917 832497
Ardfern		01852 500247
Port Ellen		01496 300131
Gigha		01583 505390
Oban Kerrera		01631 565468
Craobh		01852 500222
Ardoran Marine		01631 566123
Balvicar Boatyard		01852 300557
Kilmelford Yacht Haven		01852 200248
Barcaldine Marina		01631 720291
Linnhe Marine		07721 503981
Dunstaffnage Marine Services		01631 710287
Jura Development Trust		01496 820161
Craighouse		01546 604274
Crinan Canal		01546 603210
Portree		01478 612926
Kyle of Lochalsh		01599 534589
Inverie		01687 462267
Arisaig		01687 450224
Gairloch		01445 712080
Glencoe Boat Club		01855 811649
Lochaber Yacht Club		01397 772398
Invergarry Castle Pontoon		01809 501254
Great Glen Water Park		01809 501381
Mallaig Harbour Authority		01687 462154
Letterfinlay Lodge Hotel		01397 712622
Kyleakin		01599 534589
Plockton		01599 544283
Caledonian Canal - WEST		01463 725406
Stornoway		01851 702688
Comhairle nan Eilean Siar (the remaining Outer Hebrides locations were grouped as one by the interviewee)		01871 810431
Coll Hotel		01879 230334

OPERATOR AND AUDIT CONSULTATIONS (MARINAS, SAILING CLUBS, HARBOURS, ETC)		
NORTH		
Operation	**Contact**	**Telephone Number**
Kinlochbervie		01971 521235
Lochinver		01571 844373
Ullapool		01854 612091
Wick		01955 602030
Helmsdale		01431 821692
Lybster		01593 721520
Kirkwall		01856 871313
Stromness		01856 871313
Lerwick Marina, Germista		01595 693537
Lerwick Harbour Authority		01595 692991
Westray - Pierowall		01856 871313
Banff		01261 815544
Caledonian Canal and Seaport Marina		01463 725406
Inverness Marina		01463 220501
Lossiemouth		01343 813066
Nairn		01667 456008
Whitehills		01261 861291
Findochty		01542 832560
Hopeman		01343 835337
Burghead		01343 835337
Lybster		01593 721520
Dunbeath		01431 821692
Keiss		01431 821692
Ackergill		01431 821692
Latheronwheel		01431 821692
Staxigoe		01431 821692
Auckengill		01431 821692
Skirza		01431 821692
Brora		01431 821692
Embo		01431 821692
Golspie		01431 821692
Portsoy		01261 815544

OPERATOR AND AUDIT CONSULTATIONS (MARINAS, SAILING CLUBS, HARBOURS, ETC)		
EAST		
Operation	**Contact**	**Telephone Number**
Peterhead		01779 483600 / 07803 264617
Stonehaven		01569 762741
Arbroath		01241 872166
Anstruther		01333 310836
Eyemouth		018907 50223
Forth and Clyde Canal		0141 332 6936
Granton		0131 552 8560
Musselburgh Harbour		ELC 0131 653 5207 FYC 07590 594355
North Berwick		01620 893333
Port Edgar		0131 331 3330
Gourdon		01569 762741
Johnshaven		01569 762741

Stakeholder Consultations
British Marine Federation
Representatives of Sail Clyde (3)
North Ayrshire Council
South Ayrshire Council
Argyll & Bute Council
Highlands & Islands Enterprise
EventScotland
VisitScotland
Representatives of Scottish Enterprise (3)

Future Developments and Planning Consultations
Aberdeen City Council
Aberdeenshire Council
Angus Council
Argyll and Bute Council
Clackmannanshire Council
Dumfries and Galloway Council
Dundee City Council
East Lothian District Council
Edinburgh City Council
Falkirk Council
Fife Council
Highland Council
Inverclyde Council
Moray Council
North Ayrshire Council
Orkney Islands Council
Perth and Kinross Council
Renfrewshire Council
Scottish Borders Council
Shetland Islands Council
South Ayrshire Council
West Dunbartonshire Council
West Lothian Council
Western Isles Council
Glasgow City Council
Riverside Inverclyde

Sailing Training Consultations		
Company	**Contact**	**Telephone Number**
National Watersports Centre, Cumbrae		01475 530757
ScotSail		0800 756 5506
Tighnabruaich Sailing School		01700 811717

Charter Hire Consultations		
Company	**Contact**	**Telephone Number**
Flamingo Yacht Charters		01475 686088
Alba Sailing		01631 565630
Portway Yacht Charters		01369 820120
Isle of Skye Yachts		01471 844216
Charter for you		01369 830258
Argyll Yacht Charters		01546 603500
Catima Sailing Ltd.		07711 635923
4 Winds Yachting		07813 034599 / 01436 670751
New Horizon Sailing		01844 260854
Sula Sailing School & Charter Hire		01972 500218
Longbow Cruising		01436 671809
Loch Goil Cruisers Motorboat Hire		01301 703382
Ardnamurchan Charters		01972 500208
Northern Light Charters		01631 740595
Discovery Cruising - Christian Charity		01855 821371
Loch Fyne Services		01546 886282
ScotSail (training and charter hire)		0800 756 5506
TSMV Gannet		01631 720262

APPENDIX VI

Sail Clyde Action Plan

SAIL CLYDE ACTION PLAN (AS AT JULY 2009)							
Destination	**Priority Rating**	**Champion / Coordinator / Liaison**	**Activities**	**Next Steps**	**Support Team / Working Party / Implementation**	**Timeframe**	**Notes**
Campbeltown	1						
Campbeltown	1						
Girvan	1						
Lamlash	1						
The 'Kyles' (Colintraive, Kames and Tighnabruaich	2						
Stonefield	2						
Inveraray	2						
Lochranza	2						
Sanda	3						

APPENDIX VII

Excerpt from EKOS's and TRC's West Highlands Sailing Study – Green and Amber Development Projects

Table 5.11: Additional Berths/Moorings – Green Projects			
	Number of resident berths/moorings	**Number of visitor berths/moorings**	**Total**
Argyll			
Oban (Barcaldine, Dunstaffnage, Linnhe, Oban Kerr)	190	60	250
Port Bannatyne	100	12	112
Campbeltown Harbour (SW)	35	10	45
Tobermory Harbour Association	0	20	20
Ardminish, Isle of Gigha	0	8	8
Jura	0	8	8
Lochaline (SW)	0	10	10
Total	**325**	**128**	**453**
Lochaber, Skye & Wester Ross			
Mallaig & Arisaig (SW)	30	15	45
Kyleakin & Plockton	40	10	50
Portree	0	15	15
Gairloch	15	0	15
Kinloch (Rhum) (SW)	0	8	8
Eigg (SW)	0	5	5
Muck (SW)	0	5	5
Inverie (SW)	0	5	5
Dunvegan	0	5	5
Carbost	0	5	5
Uig	0	5	5
Total	**85**	**78**	**163**
Outer Hebrides			
Stornoway Harbour	25	10	35
Lochmaddy	0	5	5
Tarbert	0	5	5
Total	**25**	**20**	**45**
Total all three areas	**435**	**226**	**661**

Note: SW = Sail West Projects
Note: Port Bannatyne is already underway so has been included within the green projects

The green projects represent 435 additional resident and 226 visitor berths/moorings. This is a total of 661 resident and visitor berths/moorings.

Table 5.12 presents the proposed number of additional berths and moorings at the locations identified as amber i.e. possible projects.

Table 5.12: Additional Berths/Moorings, Amber Projects			
	Number of resident berths/moorings	**Number of visitor berths/moorings**	**Total**
Argyll			
Tarbert	0	0	0
Ardrishaig	30	20	50
Croabh Haven	75	20	95
Port Ellen Marina, Islay	0	0	0
Upper Loch Fyne (includes Otter Ferry) (SW)	0	8	8
Kinlochleven (SW)	0	5	5
Total	**105**	**53**	**158**
Outer Hebrides			
Lochboisdale	25	10	35
Castlebay Barra	0	5	5
Total	**25**	**15**	**40**
Total both areas	**130**	**68**	**198**

Note: SW = Sail West Projects.
In Lochaber, Skye and Wester Ross there are no amber projects as all have been identified as strategically important i.e. green.

In total there are 198 additional berths and moorings (130 resident and 68 visitor) of amber status.

In addition to the Sail West Projects identified in **Tables 5.11** and **5.12** above, one has been categorised as red - Canna. However, under the first Phase of the Sail West Project, a review of Kinlochleven and the Small Isles (including Canna) is being undertaken and the study might identify support for development in Canna or a need to increase Kinlochleven to a green project.

APPENDIX VIII

Planned / Proposed Developments Identified by this Study

CLYDE

OPERATOR INTERVIEWS		
Name / Location	**Additional Berths: Aspiration / Rumoured**	**Additional Berths: Planning Permission Granted**
Largs	250	50
Girvan		60
Fairlie Quay Marina	200-250	
Kip	60	
Bowling		50
Ardrossan	500	
Holy Loch Marina		130
Campbeltown Harbour	125	
TOTALS	**1,135**	**290**

COUNCIL'S AND OTHER PUBLIC SECTOR AGENCIES INTERVIEWS		
Name / Location	**Additional Berths: Aspiration / Rumoured**	**Additional Berths: Planning Permission Granted**
Riverside Inverclyde – Greenock	600	
Glasgow City Council / Scottish Enterprise – Glasgow Canting Basin	300	
Sail West – Ayr and Maidens	400	
TOTALS	**1,300**	

RUMOURED DEVELOPMENTS KNOWN TO THE CONSULTANTS		
Name / Location	**Additional Berths: Aspiration / Rumoured**	**Additional Berths: Planning Permission Granted**
Rhu	150	
Stranraer	190	
Ardyne Point	220	
TOTALS	**560**	

GRAND TOTAL	**2,995**	**290**
TOTAL BERTHS IN AREA (Aspiration and Planned)	**3,285**	

On further examination of the 'aspirational' the following can be removed as they are unlikely to come to fruition during the timeframe considered by this study.

PROJECTS UNLIKELY TO COME TO FRUITION IN THE TIMEFRAME UNDER STUDY	
Name / Location	**Additional Berths: Aspiration / Rumoured**
Ardyne Point	220
Stranraer	190
Glasgow	300
Half of Greenock	300
A Further 250 berths (Either Ayr or Fairlie)	250
TOTALS	**1,260**

This suggests that approximately **2,000 new berths** may come to the market.

WEST

OPERATOR INTERVIEWS		
Name / Location	**Additional Berths: Aspiration / Rumoured**	**Additional Berths: Planning Permission Granted**
Oban Kerrera	30	45
Craobh Marina	100	
Barcaldine Marina		50
Linnhe Marine	20	
Dunstaffnage Marine Services	100	
Inverie	4	
Mallaig Harbour Authority	50	
Stornoway	40	
Oban Bay		60
TOTALS	**344**	**155**

TOTAL BERTHS IN AREA (Aspiration and Planned)	499

This suggests that approximately **500 new berths** may come to the market.

NORTH

OPERATOR INTERVIEWS		
Name / Location	**Additional Berths: Aspiration / Rumoured**	**Additional Berths: Planning Permission Granted**
Lochinver	10	
Ullapool		20
Helmsdale		1
Kirkwall	25	
Stromness	25	
Nairn		2
Buckie	141	
TOTALS	**201**	**23**

COUNCIL'S AND OTHER PUBLIC SECTOR AGENCIES INTERVIEWS		
Name / Location	**Additional Berths: Aspiration / Rumoured**	**Additional Berths: Planning Permission Granted**
Highland Council – Whiteness		600
TOTALS		**600**

GRAND TOTAL	**201**	**623**
TOTAL BERTHS IN AREA (Aspiration and Planned)	**824**	

This suggests that approximately **800 new berths** may come to the market.

EAST

OPERATOR INTERVIEWS		
Name / Location	**Additional Berths: Aspiration / Rumoured**	**Additional Berths: Planning Permission Granted**
Anstruther		18
Granton		75
Port Edgar	250	
Forth and Clyde Canal	14	
TOTALS	**264**	**93**

COUNCIL'S AND OTHER PUBLIC SECTOR AGENCIES INTERVIEWS		
Name / Location	**Additional Berths: Aspiration / Rumoured**	**Additional Berths: Planning Permission Granted**
Edinburgh City Council – Leith Masterplan		200
TOTALS		**200**

GRAND TOTAL	**264**	**293**
TOTAL BERTHS IN AREA (Aspiration and Planned)	**557**	

This suggests that approximately **550 new berths** may come to the market.

APPENDIX IX

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2. Economic Benefits of the UK Leisure Boating Industry (2005)	British Marine Federation
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7. Marina Development Opportunities in Scotland (September 2008) – Produced for Scottish Development International	RGA Waterfront
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9. Sailing in the Clyde Estuary – The Potential for Future Development (June 2006) – Produced for Scottish Enterprise and Highlands and Islands Enterprise	McKenzie Wilson
10. Watersports and Leisure Participation Survey 2008	British Marine Federation
11. Watersports and Leisure Participation Survey 2007	British Marine Federation
12. Welcome Anchorages 2009 Guide	
13. Sail West Project – A Strategic Programme for the Development of Marine Leisure Activities and Infrastructure (Nov 2007)	Project Consortium Consultants from the following: Irish Marine Federation, McKenzie Wilson, Quay Marinas and Motomo
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17. Harbour Facilities Development Study (Oct 2006) – Produced for Caithness and Sutherland Enterprise	Tourism Resources Company
18. Banff Marina Tourism Strategy (Oct 2004) – Produced for Aberdeenshire Council	Tourism Resources Company
19. Overview of the Marine Leisure Tourism Sector in Lochaber (Sept 2006) – Produced for Lochaber Enterprise	Stewart Miller Associates
20. Marine Leisure Infrastructure on the Atlantic Islands of Argyll (Aug 2007) – Produced for Argyll and the Islands Enterprise	McKenzie Wilson
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24. Campbeltown Options Appraisal (Apr 2008) – Produced for Argyll and Bute Council	Scott Wilson
25. Lochranza, Isle of Arran Visitor Moorings and Landing Facilities (Mar 2006) – Produced for North Ayrshire Council	Wallace Stone & Partners
26. Presentation: The Sail Clyde Project – Sailing in the Clyde Estuary – Firth of Clyde Forum (November 2007) – Produced for Scottish Enterprise and Highlands and Islands Enterprise	Robin Cole

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28. Boating Demand in Scotland Study – Survey of Transit Users (April 2008) – Produced for British Waterways	TNS Travel & Tourism
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30. Shetland Marinas Guide	Shetland Marinas
31. Yearbook and Classified Buyer's Guide 2007 – 2009	British Marine Federation
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33. The Campbeltown Dossier and Notes (June 2008)	C*H*O*R*D*
34. Proposed Pontoons Millport – Isle of Cumbrae Options Appraisal (Oct 2004) – Produced for Argyll and the Islands Enterprise	Turner & Townsend Project Management