Argyll & the Islands
ENTERPRISE

Marine Leisure Tourism in Argyll & the Islands

Summary of Questionnaire Exercise

Background

Argyll & the Islands Enterprise (AIE) commissioned Stewart Miller associates (SMa) to produce a report on the Argyll and Islands marine leisure tourism sector. A sixty page report has now been submitted to Steven Dott at AIE. The report includes the following: an overview of tourism & the marine leisure tourism sectors; details on the A & I operators and infrastructure; examples of best practice; and opportunities for the sector, including recommendations for future sector assistance. This report will be available on line from July 2004 onwards, at www.hie.co.uk/aie

Summary Report

You kindly completed a questionnaire, and as promised, please find below the summary of results from this industry-participating exercise:

Note: the sample was large enough to be a very worthy representation of the sector. However, the sector is very diverse and **fragmented,** with much crossover between recreationalists and tourists. Therefore some caution should be noted with some of the figures arrived from the survey. This is especially relevant where the sample size was very small for some sub sectors.

Sample

SMa identified 153 organisations involved in the marine leisure tourism sector, from the following sources: local marine associations, Royal Yacht Association, British Marine Federation, SAIL Scotland, AIE, local tourist boards, Visit Scotland, by searches on the internet, and from publications such as Yellow Pages. A questionnaire was distributed to all and 62 responses were received (a 40.5% response rate). The make up of the sample was as follows:

Type of Organisation	No Targeted	No of **Responses**	Sample as a % of Total
Yacht charters & other leisure boat operators	46	26	56.5%
Sailing clubs/schools	29	9	31.0%
Other outdoor activity providers	28	5	17.9%
Harbours, marinas, pontoons, moorings, etc	44	19	43.2%
Others	6	3	50.0%
Total	153	62	40.5%

INVESTOR IN PEOPLE

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CHARTER MARK

POSITIVE ABOUT DISABLED PEOPLE

Employment

The industry sector is dominated by small enterprises, mostly consisting of up to two full time positions. According to the survey 44% of the total workforce are in full time employment. 24% are part time, with 32% of positions being seasonal. The marine leisure tourism sector accounts for almost 600 direct full time equivalent jobs in Argyll and the Islands.

Turnover

28% of the identified industry (not all organisations submitted turnover figures) were responsible for £6.6 million of turnover last year. What is very re-assuring is that the sector is predicting 10.7% growth in turnover for this year. The yacht charters and other leisure boat operators are particularly optimistic, quoting an estimated 18% growth.

Types of Businesses & Activities Provided

The breakdown of business types is provided in the sample section. The chart below provides details of the diverse activities available in the A & I area (taken from the 62 organisations that completed questionnaires):

Activities	No of Responses
Infrastructure & Support Services for sector	23
Yacht/Boat Cruises & Sight Seeing Tours	33
Rib Boat/Speed Trips	4
Inland Cruising	2
Fishing Trips	10
Canoeing	10
Water Ski-ing	1
Jet Ski-ing	2
Windsurfing	5
Diving	12
Surfing	1
White Water Rafting	0
Paragliding	0
Other Marine Based Activities *	15

* other includes work boat/ferry (4 entries), sailing tuition (3), dingy sailing (2), small boat hire (2), raft building & teambuilding (2), kayaking, kite surfing, body boarding, yacht racing, powerboating, and research & survey services (1 each).

Geographical Markets

The geographical customer base for the sector has similarities to the national visitor profile, in that overseas visitors account for less than 10% of the volume business (with the exception of yacht charters). What is different to the national visitor profile is that Scottish customers account for 60%, but this is partly because sailing clubs are dominated by local members, and infrastructure providers are also used more often by local and regional customers (e.g. harbours will have included ferries and other commercial interests).

Type of Organisation	Local %	Central Scotland %	Rest of Scotland %	England %	Rest of UK %	Overseas %
YACHT CHARTERS	6	13	6	53	7	15
OTHER LEISURE BOATS	10	17	10	42	12	9
SAILING SCHOOLS	9	39	18	27	4	3
SAILING CLUBS	70	19	7	4	-	-
OTHER OUTDOOR ACTIVITY PROVIDERS	25	37	26	9	1	2
MARINAS	26	24	12	27	5	6
HOTELS/MOORINGS	30	28	10	25	4	3
HARBOURS, PIERS, ETC	44	33	7	7	6	3
OTHERS	53	32	10	4	1	-
INDUSTRY TOTALS	25%	24%	11%	28%	6%	6%

Type of Customers

The top three type of customers for each sub sector and the sector as a whole is as follows:

Type of Organisation	1st	2nd	3rd
YACHT CHARTERS	individuals	group tours (incl sailing/sports clubs)	families/ independent groups
OTHER LEISURE BOATS	individuals	independent groups	group tours
SAILING SCHOOLS	individuals/families/ independent groups/ group tours	individuals/families/ independent groups/ group tours	individuals/families/ independent groups/ group tours
SAILING CLUBS	members	individuals (incl individual boat owners)	schools
OTHER OUTDOOR ACTIVITY PROVIDERS	group tours	schools	families
MARINAS	individuals (incl individual boat owners)	other businesses (e.g. marine related)	group tours
HOTELS WITH MOORINGS	individuals (incl individual boat	independent groups	couples/families

	owners)		
HARBOURS, PIERS, ETC	individuals (incl boat owners)	other businesses (e.g. commercial users)	group tours
SECTOR-WIDE	individuals	group tours	independent groups

Requested Assistance for the Sector

The biggest request by far (with 47%) was the need for infrastructure improvements. 13 responses specifically mentioned development work at Oban. The biggest concern there is a lack of berthing space. In terms of financial assistance, 34% mentioned the need for assistance towards promotion. The majority support group promotion activities, like continuing to support SAIL Scotland. 26% mentioned investment grants for business development. The need for continually upgrading boats and facilities was mentioned by many. The "other" section produced a number of varied responses. A few mentioned the need for a strategy for the marine leisure sector, which also took into account the needs of commercial fishing. Three also mentioned the request for advice and financial support with legislative matters. Three responses were mentioned for help with training, with one stating that a pro-active approach should be taken for developing a training programme for the industry. Two individuals requested that the authorities work closer together on supply provision.

Type of Organisation	Financial Assistance (no. of responses / %)		Infrastructure Support (no. of responses / %)	Other (no. of responses / %)
	Promotion	Investment Grants		
YACHT CHARTERS & OTHER LEISURE BOATS	8 31%	7 27%	13 50%	8 31%
SAILING SCHOOLS/CLUBS	3 33%	3 33%	4 44%	1 11%
OTHER OUTDOOR ACTIVITY PROVIDERS	2 40%	1 20%	4 80%	1 20%
MARINAS, HARBOURS, MOORINGS, ETC	7 37%	5 26%	6 32%	4 21%
OTHER	1 33%	- 0%	2 67%	1 33%
INDUSTRY TOTALS	21/62	16/62	29/62	15/62
% FREQUENCY	34%	26%	47%	24%

Thank you once again for your time and efforts.

Stewart Miller
Stewart Miller associates
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