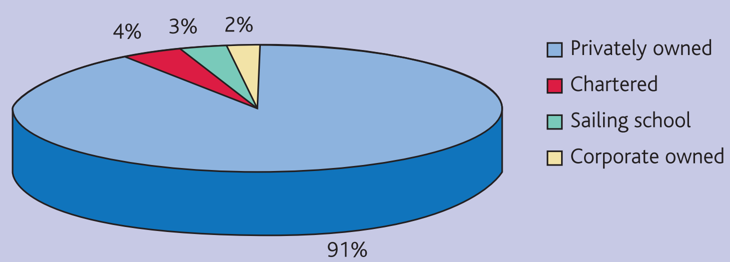
TOURISM SOUTH EAST

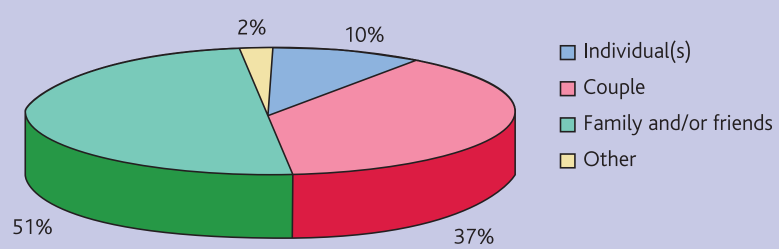
SEEDA SOUTH EAST ENGLAND DEVELOPMENT AGENCY
Working for England's World Class Region

Figure 1: Boat ownership



0.4

Figure 2: Crew composition



Where are cruising crew coming from?

Top 10 home residence

UK visiting boats	Overseas visiting boats
Hampshire	Netherlands
Surrey	Germany
Greater London	Belgium
West Sussex	France
Dorset	Sweden
Kent	Finland
Essex	Norway
Hertfordshire	Denmark
East Sussex	Luxembourg
Berkshire	Spain

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Leisure cruising in the South East

Findings from the first ever study into the size, volume and economic impact of yachting tourism in the South East

Among the region's great assets are its coastline and maritime heritage. Its network of marinas and natural harbours makes the region particularly attractive for sailing holidays, which in turn provide a key source of income for local businesses.

To find out more about the market and gather data to help inform promotional strategies for the future development of the market, the Research Unit at Tourism South East undertook the first ever regional study into the volume, value and 'visitor experience' - of sailing holidays.

The study involved a self-completion questionnaire survey of nearly 1,500 visiting boats and interviews with marina/harbour managers.

Key findings

- There are around 99 berthing providers in the region providing an overall capacity of 30,940 mooring spaces.
- Some 671,000 yachtspersons visited marinas and harbours located in the region and spent around £21.5 million. Taking into account multiplier effects, this translates into £27.9 million and supports approximately 697 full time equivalent jobs
- The vast majority of visiting parties arrived in boats that were privately owned (around 91%). Most were sailing yachts rather than motor boats with an average boat size of 33.9 feet.
- 83% of visiting parties contained UK residents, with over half (57%) of domestic visitors originating from locations in the South East.
- Overseas visiting parties made up the remaining 17% of the survey sample. Most were from the Netherlands (10.3% of the overall sample), followed by Germany (2.1%), Belgium (1.8%), and France (1.1%).
- On average, visiting parties contained 3 people. Around half were families and groups of friends (50.5%), while a further third (37.2%) were couples.
- The proportion of visiting parties containing children under 16 years of age was relatively small, around 9.5%. The most common age group found among the visiting parties was 45 years to 54 years of age (26.1%).
- Repeat visitation was high among the visitors; some 72.5% had visited the harbour/marina before. Not surprisingly, repeat visitation was higher among the domestic visitors than overseas visitors (75.6% compared to 57.4% among the overseas visitors).
- Visitors took an average of 17 cruising trips per year (including day trips, weekends and longer trips).
- For domestic visiting parties, cruising trips tended to involve on average of 45.5 nights away from home each year. Approximately 72.6% of these nights away tend to be spent at UK marinas and harbours.
- Overseas visiting parties were found to spend more nights away from home each year; an average of 62.8 nights away from home. Just under a quarter (23.5%) of these nights tend to be spent at UK marinas and harbours.
- For both domestic and overseas visiting crews the average duration of overnight visits to any of the marinas or harbours within the region was around 2 berth nights.
- Overall the most popular mooring facility used by visitors during a cruising trip is a marina (70.7%).
- Apart from tidal or weather considerations, the single most important factors when deciding on a marina or harbour to visit were facilities such as showers and toilets.
- Generally a high level of satisfaction on facilities and services was found. The following areas received predominately 'good' or 'excellent' ratings: helpfulness of staff, feeling of safety and security, marine-related information on site, local visitor information, the availability of fuel, water and electricity.
- The areas that received more 'average' and 'poor' ratings related to the availability of chandlery and specialist services such as repair services, the availability of toilets and shower facilities, the quality of toilets and shower facilities, the range and quality of local places to eat and drink ashore.
- The lowest levels of satisfaction related to value for money on most aspects from value of money of local places to eat and drink, value for money of local shops, and in particular the value for money of mooring fees. Overseas visitors found mooring fees more expensive than domestic visitors.
- Visiting yachtspersons are in general high spenders. Overall average expenditure per visiting party per visit was £239.48. Spend split by domestic and overseas visiting parties indicate that overseas visitors spent on average around £185.29 per party per visit more than domestic visitors (£211.80 for domestic parties and £397.09 for overseas parties).
- The items that generated the greatest average spend per party per visit were eating out and drinking ashore and marina and ancillary charges.
- Sailing holidays are strongly influenced by seasonality. The key sailing period is April to October, with June, July and August being the peak months. The largest volume of boats arrive over August.

Leisure cruising in the South East

Next Steps

The following outlines a tentative action plan the purpose of which is to facilitate a viable competitive yachting tourism sector and to ensure that the benefits of this market are maximised and spread throughout the region. The proposals will require concerted efforts of a range of agencies if they are to be successfully implemented. Key agencies include the Yacht Harbours Association (YHA), Royal Yachting Association (RYA), British Marine Federation (BMF), South East of England Development Agency, South East England Regional Assembly, Tourism South East, Local Authorities and private marina companies and harbour authorities.

Establishing benchmarks

Each participating marina and yacht harbour received a confidential report presenting their own results. The report contained data on visitor profiles and satisfaction ratings which were compared to an 'all marina' benchmark, made up of the aggregated results from all completed questionnaires.

For most of the participating marinas/harbours the survey of visiting boats provided for the first time the opportunity to find out more about the profile and origin of crew, their opinions on facilities and services, and to compare results with other marinas.

Draft actions

- YHA with partner agencies to encourage and guide improvements to berthing and supporting facilities that will further enhance visitor experience and encourage increased visitation.
- Marinas and yacht harbours to be encouraged to monitor performance through visitor surveys on a regular basis.

Informing marketing strategies

It is a general characteristic of the leisure yachting sector that 'port hopping' rather than long sea journeys is the norm. As a result, the development of one destination along a key sailing route, will enable other destinations to feel the benefit too. Research suggests that growth lies with the day sailing and family cruising markets. Both markets necessitate shorter trips and sailing destinations with close proximity of one another. The South East with its network of marinas and harbours is well positioned to foster this potential and attract growth markets to the region. Collaborative marketing and product development initiatives need to be encouraged.

There is scope for a distinctive South East sailing product which could be developed in partnership with private sector marinas and local harbour authorities. Emphasis needs to be placed on information provision (i.e. places to eat and drink, yachting events, mooring facilities, on-shore facilities) and destination marketing through which the abundant opportunities in the South East are promoted.

Draft Actions

- TSE to work with YHA and Marinas to form a Marine Marketing Group to review joint marketing opportunities.
- TSE to work with Local Authority partners and members to ensure that the needs of Yachting Tourists and Day Visitors are appropriately addressed in printed, displayed, on-line and one-to-one information services.
- TSE to work with Local Authority partners and members to ensure that Marinas and Harbours fully recognise the need for local information on transport, services, places to eat, shops and attractions and encourage co-operation between Local Authorities and businesses to see that this is effectively available to Yachting Tourists and Day Visitors.

Volume and value

Yachting tourism bring economic benefits to visitor towns. This study has shown that in additional to revenue raised from marine related expenditure, e.g. mooring/berthing fees, fuel, boat repairs, a significant proportion of visiting boat expenditure goes towards eating out, shopping and entertainment benefiting non-marine businesses located on-shore and in the wider town area.

Draft Actions

- With its Partners, TSE to raise awareness of the economic value of yachting tourism to the regional economy through press releases/ bulletins and through relevant trading journals/magazines.
- Local Authorities to encourage more visiting crew expenditure in visiting towns by raising awareness of local goods and services available.

Regional planning guidance

The planning framework recognises the conservation requirements of the environment. Existing and potential marinas and moorings must be managed prudently to comply with environmental designations and controls. In sensitive areas, the managed provision of such facilities is usually preferable to unmanaged use.

Water-based recreation and public enjoyment of the environment for sport and recreation are also established objectives.

The potential social and economic value of recreational activity and yachting tourism should be fully appreciated in any evaluation of factors influencing planning and regulatory decisions.

Draft Actions

- TSE to work with YHA, RYA and others to raise awareness of the needs and benefits of water-based recreation and yachting tourism.
- TSE to work with YHA and others to support the enhancement of exiting, and the creation of new, facilities and services to meet established need, where there is minimal environmental and/or conservation impact. Local planning policies must address these issues; especially where the volume of demand is excessive or the continuing viability of facilities is in doubt.
- TSE to work with SEERA to ensure Regional Spatial planning policy fully considers the opportunities for water-based recreation and yachting tourism, and related facilities.

The study focused on leisure visits and excluded visits motivated for the purpose of racing and special events. The study is currently in its consultative phase and the final report is expected to be available in Spring 2005. Contact Dr Parves Khan, Head of Research t:023 8062 5459 e:pkhan@tourismse.com for further details.

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