A Study of the Size & Economic Impact of Yachting Tourism in the South East

Final Report

March 2005

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With support from
South East England Development Agency

TOURISM
SOUTH EAST

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ACKNOWLEDGEMENT

We would like to thank marinas and harbours who took part in this study. Without their co-operation, this study would not have been possible.

We would also like to thank Ken Robinson and Sam Bourne for their guidance and support.

EXECUTIVE SUMMARY

- This report presents the preliminary findings of a survey of visiting cruising boats at selected marinas and yacht harbours within the South East Region. The survey was funded by the South East England Development Agency (SEEDA) and carried out by the Research Unit of Tourism South East.

- The survey involved a self-completion questionnaire survey. A total of 1,437 completed questionnaires were received.

- 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.

- Boats are frequently sailed each year; over 30 days a year.

- 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%).

- Among domestic visitors, Cowes on the Isle of Wight was the most frequented location. The next two most popular choices were Yarmouth and Lymington.

- The overseas visitors' experience was rather different. Coastal harbours and marinas in Dover in Kent, Brighton in East Sussex and Oostende in Belgium were by far the most frequented locations by boat.

- Apart from tidal or weather considerations, the single most important factor when deciding on a marina or harbour to visit are facilities such as showers and toilets.

- The survey found that with regard to ambience, quality of service and value for money Yarmouth, Cowes and Lymington were consistently the most popular choices.

- 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' 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.

- 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.

- It is estimated that some 187,518 berth nights were spent in the region by visiting cruising boats. The domestic market accounted for 89% of all berth nights (166,805 visitor berth nights compared to 20,713 overseas visitor berth nights). It is estimated that a further 23,744 boats visited for the day or a short-stay of a few hours.

- When the number of berth nights is multiplied by the average crew size, this translates to nearly 600,000 overnight visitors and approximately 72,500 day visitors. A further 15% of berth nights are taken up by boats that anchor.

- The monthly breakdowns indicate that the sector is 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 arrived over August.

- In total some £22.5 million was spent by visiting crew in 2003. With an economic multiplier of 1.3 this translates into an nearly £30 million in total. Around 41% of this expenditure directly benefits tourism/leisure related businesses.

- In total, yachting tourism expenditure supports an estimated 721 FTE jobs.

1. INTRODUCTION

1.1 BACKGROUND

This report presents the findings of a survey of visiting boat crews at selected marinas and yacht harbours within the South East Region. The survey was funded by the South East England Development Agency (SEEDA) and carried out by the Research Unit of Tourism South East.

The marine industry represents a significant economic force in the South East. British Marine Industry Federation figures for 2003 suggest that total annual turnover of the marine industry in the UK was 1.8 billion, a 5% increase on 2002. 35% of this turnover, some £664 million was generated in the region, mainly from manufacturing and exports.. However, the economic contribution made by the sector to the region is greater than current statistics suggest. Industry turnover figures do not account for all the visitor expenditure related to marine leisure and tourism.

Visiting boats to marinas and yacht harbours across the region bring visitors to coastal towns and cities, ready to spend money in restaurants/bars/pubs, on retail goods/shopping and on entertainment. The South East includes many sheltered natural harbours and towns/cities heavily orientated towards meeting the needs of leisure sailors, and is attractive both to UK based boat crews and cruising visitors from mainland Europe. The region is also renowned for its quality and variety of sailing experiences, highlighted by its hosting of international premier events such as Cowes Week.

There is, however, a dearth of data on the size and value of yachting tourism. No previous study has attempted to quantify the economic contribution visiting boats make to the region in terms of tourism expenditure and employment introduced into the economy. Little is also known about the 'visitor experience' - i.e. levels of satisfaction, the needs and preferences of visiting crew, thus often hampering the improvement of services and facilities. The leisure marine sector, like any other sector, needs continual investment, if it is to grow and prosper.

In view of the above, this study draws together baseline data to assesses the size and market profile of yachting tourism and establishes benchmarks to identify relative performance based on visitor ratings.

The information gleaned from this study will also be used to support and inform future collaborative actions to promote the region as a destination for cruising boat holidays and day trips.

The study has the support of the British Marine Federation (BMF) and the Yacht Harbours Association (YHA). We are also very grateful for the co-operation and assistance provided by the staff of the marinas and harbours who participated in the survey, since the study could not have been completed without their help and support.

1.2 RESEARCH OBJECTIVES

There is currently a lack of concrete knowledge about the volume and value of yachting tourism in the South East. Whilst overall marine industry revenue data is available at regional level, it can tell us little about the number of people who take leisure cruising holidays, weekend and day trips, where they come from, and their contribution to this revenue in terms of expenditure on berthing, charter, equipment and services. There is also little data on levels of ancillary spend on items such as taxi services, eating out and shopping which benefits other local businesses.

The general aim of the study is to rectify this knowledge gap by gathering information on the profile and origin of visiting cruising yacht crews, the frequency of boating trips, the number of visits to marinas and harbours located in the region and expenditure during their stay. An additional concern is to gather opinions of facilities provided at the location where they were surveyed in order to identify the strengths and weaknesses of the facilities and services provided at participating marinas and yacht harbours.

Four outputs have been identified:

1. To measure the success of marinas/harbours through visitor ratings. This information will help to establish benchmarks that highlight opportunities for service improvements and product development.
2. To offer marinas/harbours an overview of the profiles and needs of their key markets to help inform future marketing strategies.
3. To identify the size and nature of yachting tourism in the South East region in terms of domestic and overseas visitor volume, profile and spending behaviour.
4. To inform future regional planning guidance and sub-regional spatial planning policy for new provision.

1.3 METHODOLOGY

In order to meet the research objectives, the study began with an audit of coastal harbours and marinas located in the South East Region (from Weymouth to the Thames Estuary).

In total, 99 berthing providers were identified, providing an overall capacity of 30,940 mooring spaces[1].

Table (i) Audit of berthing providers	Estimated number of berthing providers	Estimated overall capacity
Weymouth to Poole Harbour	2	870
Poole Harbour to Christchurch	8	1,767
Christchurch to Southampton	8	2,450
Southampton to River Hamble	5	1,105
River Hamble to Portsmouth Harbour	10	3,033
Portsmouth Harbour to Bognor Regis	20	11,564
Isle of Wight	11	2,035
Bognor Regis to Eastbourne	10	2,960
Eastbourne to Ramsgate	6	1,853
Ramsgate to Greater London	19	3,303
Total:	**99**	**30,940**

A number of harbours and marinas around the region were invited to take part in a survey of visiting cruising boats between June and October 2003. The owner or skipper of visiting cruising yachts were asked to complete a short survey questionnaire in exchange for a discount on their overnight mooring fee (a copy of the questionnaire is found in Appendix 1). Questionnaires were not distributed during significant events or racing regattas such as Skandia Life Cowes Week, so as not to skew the results.

A total of 16 marinas and harbours were recruited to take part in the study, resulting in a total of 1,437 completed questionnaires. The sample achieved at each participating location is shown in Table (ii), below.

Table (ii): Participating harbours & marinas	Completed q'naires
Weymouth Marina (Dean & Reddyhoff)	128
Dolphin Yacht Haven – Poole	135
Yarmouth Harbour	86
Lymington Yacht Haven	171
Beaulieu River/ Bucklers Hard	89
Cowes Yacht Haven	58
Hamble Point Marina (MDL) – Hamble	38
Port Hamble Marina (MDL) – Hamble	76
Mercury Yacht Harbour (MDL) – Hamble	38
Haslar Marina (Dean & Reddyhoff) – Gosport	32
Port Solent Marina (Premier)	99
Southsea Marina (Premier)	66
Brighton (Premier)	198
Sovereign Harbour – Eastbourne	92
Dover	103
Ramsgate	28 (no incentive offered)
Total:	**1437**

[1] Sources include the British Marine Federation Marinas & Moorings National Audit (2003/4) – Coastal Sectors and Royal Yachting Association database

Section 2 to 5 present survey data obtained from the 16 participating marinas/harbours only.

In addition to the survey questionnaire, the harbours and marinas identified in the audit (see table i) were contacted in order to obtain their records of the number of overnight stays by visiting boats and the number of day or short stay visiting boats. These records provided the basis for estimating overall domestic and overseas visiting yacht volumes. Of the 99 berthing providers contacted, 50 supplied information on visiting boats (See Appendix 2 for a list of harbours and marinas supplying information).

Following the initial running of results from questionnaires and records of volume of visiting boats, participating marinas/harbours were invited to provide feedback.

In October 2004, marinas/yacht harbours, yachting associations and local authorities were invited to a workshop to discuss the draft actions emanating from the research.

1.4 DEFINITIONS

Yachting tourism includes sailing and motor cruising (the motorised version of sailing) which involves a visit to a coastal marina or harbour for at least one overnight stay. It excludes dinghy sailing, visits that are primarily event or competition based, and residential berth holders. As the focus of this research is on leisure travel which involves at least one overnight stay, day visit activities have not been included in this study.

It is recognised that the short-stay/day leisure yachting market is a key segment. It was outside the scope of this study to gather profile data on this segment of the market. However, where available, data on visits by day visitors has been used to provide an estimation of the overall volume and value of leisure yachting to the regional economy.

A **visitor berth night** refers to 1 visitor night, that is 1 boat (and crew) berthed overnight for 1 night. A boat staying for 3 nights would be counted as 3 visitor berth nights. It excludes boats staying overnight at anchor.

For the purpose of this study the **South East Region** refers to the geographical area that stretches from Weymouth to the Thames Estuary. It excludes London.

Berths/Mooring is used interchangeably and refers to a place where a vessel (yacht or boat) can be tied up or made fast. This includes pontoon berths, pile and swinging moorings, as well as places where boats can be tied up alongside a harbour wall).

1.5 PRESENTATION OF KEY FINDINGS

Key findings are presented under the following sub-headings:

2 Profile & origin of visiting yacht crews
3 Yachting tourism experience
4 Visitors' opinions on facilities and services
5 Visitor party expenditure
6 Volume and value of yachting tourism
7 Summary of findings
8 Study outputs and action plan

The first set of results **Profile & origin of visiting yacht crews** present data on the size and age composition of visiting parties and their normal place of residence. It also includes details of the size and type of craft sailed in.

Data on the frequency of trips, the ports, harbours and marinas visited, and the factors most important when deciding of a place to visit are presented under the next sub-heading **Yachting tourism experience**.

The third sub-heading **Visitors' opinions on facilities and services**, focuses on performance issues and examines levels of satisfaction on facilities and services experienced among the visiting parities.

Data on the amount spent at the visited marina/harbour is presented under the forth sub-heading **Visitor party expenditure**.

Expenditure data, supplemented by data on visitor nights statistics supplied by marinas and harbours across the South East provide the basis for estimating the overall number of leisure yachting based trips, and the spend associated with those trips. Economic impact figures are presented under the sub-heading **Volume and value of yachting tourism in the South East**.

Following feedback from participating marinas/harbours and wider consultation with the region's marine industry, the final section **Draft study outputs and action plan** presents the key outputs emanating from the study and recommendations for future action. Please note that these are to be reviewed and extended by partners.

All results are based on the sample responding to each question and exclude 'no replies'/missing cases.

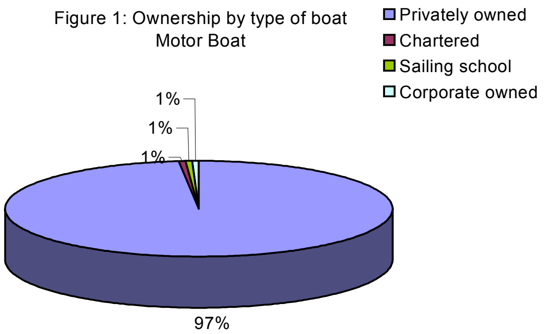
Commercially sensitive benchmarking data relating to individual marinas has been removed from this report.

2. PROFILE & ORIGIN OF CRUISING YACHTS & THEIR CREWS

2.1 VESSEL TYPE & SIZE

Table 1: Boat ownership

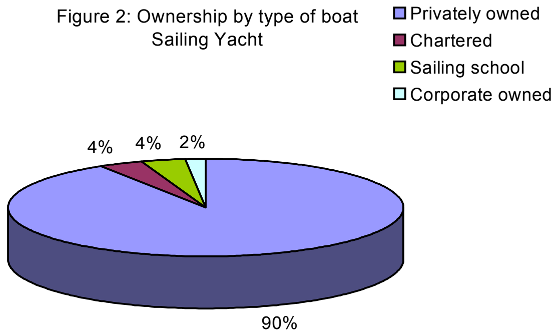
Base	1436	
Privately owned	1306	91.0%
Chartered	54	3.8%
Sailing school	44	3.1%
Corporate owned	31	2.2%



The vast majority of visiting parties arrived in boats that were privately owned (around 91%). Very few visitors used chartered boats (only 3.8%).

Table 2: Type (power/sail)

Base:	1436	
Motor boat	369	25.7%
Sailing yacht	1067	74.3%



Sailing yachts were by far the most popular type of craft; some three-quarters (74.3%) of those surveyed were in sailing yachts rather than motor boats. Most boats were between 24 feet to 45 feet in size. A significant proportion of boats (26.6%) were between 32 feet to 36 feet in size, providing an average boat size of 33.9 feet.

Table 3: Size (LOA) in feet

Base	1425	
Less than 24ft	76	5.4%
24-28ft	179	12.6%
28-32ft	253	17.8%
32-36ft	379	26.6%
36-40ft	280	19.6%
40-45 ft	183	12.9%
45-50ft	45	3.1%
50-60ft	24	1.7%
More than 60ft	5	0.4%

2.2 ORIGIN OF VISITING VESSELS & THEIR CREWS

83% (n = 1,192) of visiting parties contained UK residents, with over half (57%) of domestic visitors originating from locations in the South East. 43% were from elsewhere in the UK. Relatively more visiting parties lived in Hampshire than other counties (nearly a fifth). Hampshire was also the most common home port of the boat.

Overseas visiting parties made up the remaining 17% (n = 245) of the survey sample. Most were from the Netherlands (10.3% of the overall sample), followed by Germany (2.1% of the overall sample), Belgium (1.8% of the overall sample) and France (1.1% of the overall sample).

Table 4: Domestic & overseas crew

Base	1436	
Domestic resident	1191	83.0%
Overseas resident	245	17.0%

Table 5a: UK residence of the owner/skipper

Base	1,192	%
Hampshire	274	19.1%
Surrey	120	8.4%
Greater London	103	7.1%
West Sussex	85	5.9%
Dorset	73	5.1%
Kent	64	4.4%
Essex	55	3.8%
Hertfordshire	38	2.6%
East Sussex	35	2.4%
Berkshire	31	2.2%
Somerset (including Bristol)	25	1.7%
Isle of Wight	21	1.4%
Suffolk	20	1.4%
Wiltshire	20	1.4%
Buckinghamshire	19	1.4%
Northamptonshire	19	1.3%
Oxfordshire	15	1.0%
Warwickshire	15	1.0%
Channel Islands	14	0.9%
Leicestershire	13	0.9%
Norfolk	13	0.9%
Worcestershire	12	0.8%
Bedfordshire	11	0.8%
West Midlands	11	0.8%
'Others[2]' mentioned by less than 10 respondents	86	6.1%
Sub-total UK residents	***1192***	***83.0%***

[2] The following 'other' locations were mentioned by fewer than 10 people representing less than 1% of the total: Cheshire, Gloucestershire, Derbyshire, Devon, Yorkshire, Scotland, Lincolnshire, S. Wales, Shropshire, Cambridgeshire, Nottinghamshire, N.Ireland, Greater Manchester, Staffordshire, Lancashire, Cornwall (and Scilly Isles), Cumbria, Isle of Man, Merseyside, Cleveland (Tees Valley).

Table 5b: Overseas residence of the owner/skipper		
Base	245	%%
Netherlands	148	10.3%
Germany	30	2.1%
Belgium	25	1.8%
France	15	1.1%
Sweden	6	0.5%
U.S.A.	5	0.4%
Finland	4	0.3%
Norway	2	0.1%
Denmark	1	0.1%
Luxembourg	1	0.1%
Spain	1	0.1%
Switzerland	1	0.1%
Czech Rep.	1	0.1%
Honduras	1	0.1%
British Virgin Islands	1	0.1%
Singapore/Indonesia	1	0.0%
Rep. Of Ireland	1	0.0%
S. Africa	1	0.0%
Sub-total overseas residents	***245***	***17.0%***

Table 5c: Proportion of domestic visitors originating from South East		
Base	1192	%
South East locations	675	57.0%
Elsewhere in UK	517	43.0%

Table 6a: UK home port of the vessel	Base	%
Gosport, Hampshire	146	10.2%
Hamble, Hampshire	115	8.0%
Chichester, West Sussex	87	6.1%
Poole, Dorset	78	5.5%
Southampton, Hampshire	66	4.7%
Port Solent, Hampshire	55	3.8%
Portsmouth, Hampshire	53	3.7%
Lymington, Hampshire	49	3.5%
Swanwick/ Bursledon, Hampshire	30	2.1%
London (non-specific) & inland River Thames	22	1.6%
Beaulieu River/Bucklers Hard, Hampshire	22	1.6%
Hythe/Marchwood, Hampshire	21	1.5%
Hayling Island & Langstone Harbour	20	1.4%
Brighton, East Sussex	20	1.4%
Southsea, Hampshire	18	1.2%
Ipswich, Suffolk	14	1.0%
Christchurch, Dorset	13	0.9%
Emsworth, Hampshire	13	0.9%
Eastbourne (Sovereign), East Sussex	12	0.9%
Ramsgate, Kent	12	0.8%
Bosham, West Sussex	12	0.8%
Cowes, IoW	12	0.8%
Burnham on Crouch, Essex	11	0.8%
'Others' mentioned by less than 10 respondents	245	20.2%
Sub-total UK home ports	***1189***	***83.0%***

Table 6b: Overseas home port of the vessel	Base	%
Hindeloopen, NL	11	0.80%
Ijmuiden, NL	9	0.60%
Lemmer, NL	8	0.60%
Enkhuizen, NL	8	0.50%
Scheveningen, NL	8	0.50%
Lelystad, NL	7	0.50%
Medemblik, NL	7	0.50%
Oostende, BEL	7	0.50%
Bruimisse, NL	7	0.50%
Netherlands (other ports)	7	0.50%
USA (various ports)	6	0.40%
Vlissingen, NL	6	0.40%
Muiderland, NL	5	0.40%
Makkum, NL	5	0.40%
Breskens, NL	5	0.40%
Blankenberge, BEL	5	0.30%
Herkingen, NL	5	0.30%
Helsinki, Finland	4	0.30%
Hellevoetslius, NL	4	0.30%
Numansdorp, NL	4	0.30%
Zierikzee, NL	4	0.30%
Hamburg, GER	4	0.30%
Berlin, GER	4	0.30%
'Other'non-UK home ports	105	7.8%
Sub-total overseas home ports	***247***	***17.0%***

2.3 AGE PROFILE & COMPOSITION OF THE CREW

Table 7a: Average crew size – all visiting boats

	Base	Average size
Total children (under 16)	1437	0.291
Total Adults	1437	2.784
Total People onboard	1437	3.075

Table 7b: Average crew size – all domestic visiting boats

	Base	Average size
Total Adults	1191	2.80
People 0-15 yrs	1191	0.28
Total People onboard	1191	3.08

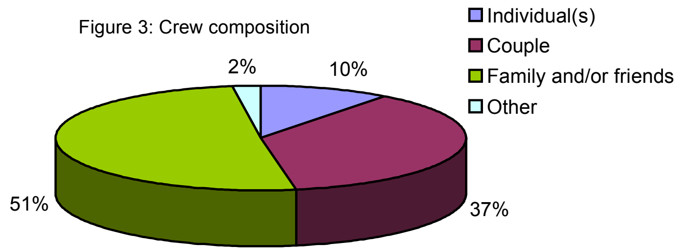
Table 7c: Average crew size – all overseas visiting boats

	Base	Average size
Total Adults	245	2.70
People 0-15 yrs	245	0.35
Total People onboard	245	3.05

Table 8: Description of crew or group

Base	1436	
Individual(s)	146	10.2%
Couple	534	37.2%
Family and/or friends	725	50.5%
Other	31	2.1%

Figure 3: Crew composition



Sailing is a social activity. On average, visiting domestic parties contained 3.07 individuals, whereas overseas parties contained on average 3.05 individuals. In general, around half of all visiting parties were families and groups of friends (50.5%). A further third (37.2%) were couples.

Table 9: Age profile of visiting crews

	Base	Percentage
People 0-15 yrs	420	9.5%
People 16-24 yrs	257	5.8%
People 25-34 yrs	507	11.5%
People 35-44 yrs	813	18.4%
People 45-54 yrs	1154	26.1%
People 55-64 yrs	909	20.6%
People 65+ yrs	358	8.1%
Total	4418	

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%).

3. YACHTING TOURISM EXPERIENCE

3.1 REPEAT VISITATION

Table 10: Whether visited that location before

	Total		Domestic		Overseas	
All locations	1433		1188		245	
First ever visit to this location	394	27.5%	289	24.4%	104	42.6%
Repeat visitor	1039	72.5%	899	75.6%	140	57.4%

Repeat visitation was high among the visitors; some 72.5% had visited the harbour/marina before. As might be expected, repeat visitation was higher among the domestic visitors than overseas visitors (75.6% compared to 57.4% among the overseas visitors).

3.2 AVERAGE DAYS PER YEAR THE BOAT IS USED & AVERAGE NUMBER OF CRUISING TRIPS

Table 11a: Average number of days per year the boat is used

	Base	Ave number of days
All locations	1416	77.04
Domestic visitors	1175	72.38
Overseas visitors	241	99.76

Table 11b: Average number of days per year the boat is used

	Total		Domestic		Overseas	
All locations	1416		1175		241	
Less than 15 days per year	37	2.6%	36	3.1%	1	0.4%
15-30 days per year	244	17.3%	231	19.7%	13	5.3%
31-60 days per year	545	38.5%	458	39.0%	87	36.2%
61-100 days per year	356	25.2%	269	22.9%	87	36.1%
101-180 days per year	150	10.6%	123	10.4%	27	11.4%
181-240 days per year	31	2.2%	27	2.2%	4	1.7%
241-360 days per year	33	2.3%	21	1.8%	12	5.0%
More than 360 days per year or live-aboard	20	1.4%	10	0.9%	10	3.9%

Boats are frequently sailed each year; 38.8% of all visitors used their boats between 31 to 60 days a year, and a further 25.2% used their boats for 61-100 days per year, providing an average of 77 sailing days per year.

Results split by domestic and overseas visitors suggest that the latter tend to sail their boats more often; on average, overseas visitors used their boats over 99.7 days sailing days per year compared with 72.4 for domestic visitors. However, it is likely that the survey by its very nature captured the more adventurous overseas visitors, while the domestic visitor sample would have included a more typical user profile with a more even mix between those who day sail to local harbours and those who venture further afield on longer trips.

Table 12a: Average number of cruising trips per year – all boats

	Base	Ave. number of trips
All locations	1384	17.02
Domestic visitors	1151	16.85
Overseas visitors	233	17.81

Table 12b : Average number of cruising trips per year – by origin

All locations	Total		Domestic		Overseas	
Less than 10 trips per year	480	34.7%	404	35.1%	76	32.6%
10-19 trips per year	387	27.9%	325	28.3%	62	26.3%
20-29 trips per year	277	20.0%	228	19.8%	49	21.3%
30-49 trips per year	169	12.2%	133	11.5%	37	15.8%
50-99 trips per year	60	4.4%	53	4.6%	7	3.0%
100-149 trips per year	9	0.7%	8	0.7%	1	0.5%
150-199 trips per year	1	0.0%	1	0.0%	-	-
More than 200 trips per year	1	0.1%	-	-	1	0.6%

On average, visitors took 17 cruising trips per year (including day trips, weekends and longer trips). The number of cruising trips taken by domestic and overseas visitors was found to be relatively comparable.

3.3 AVERAGE VISITOR NIGHTS SPENT IN THE UK AND OVERSEAS

Table 13a: Average nights spent as a visitor in UK and overseas ports & harbours – all locations

Domestic visiting crews	Descriptive Statistics				
	Base	Average	Minimum	Maximum	
Nights per year as visitor in UK marinas or harbours	1073	33.06	0	352	72.60%
Nights per year as visitor in OVERSEAS marinas or harbours	1073	12.5	0	365	27.40%
Total nights per year away from home berth	1073	45.56	1	365	
Overseas visiting crews					
	Base	AVERAGE	Minimum	Maximum	
Nights per year as visitor in UK marinas or harbours	193	14.79	0	70	23.50%
Nights per year as visitor in OVERSEAS marinas or harbours	193	48.05	0	365	73.50%
Total nights per year away from home berth	193	62.85	10	365	

For domestic visiting parties, cruising trips tended to involve an average of 45.5 nights away from the home berth 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. However, fewer nights away, just under a quarter (23.5%) tend to be spent at UK marinas and harbours.

In general, for domestic visitors the average duration of a cruising trip tends to be around 2.7 visitor berth nights, and for overseas visitors the average trip duration tends to be 3.5 visitor berth nights.

The survey found that the average length of stay at the marina/harbour surveyed at was a little shorter, around 2 nights for both domestic and overseas visiting crews.

Table 13b: Average number of nights staying at that location

	Base	Average
All locations	1397	2.09
Domestic visitors	1162	2.03
Overseas visitors	235	2.34

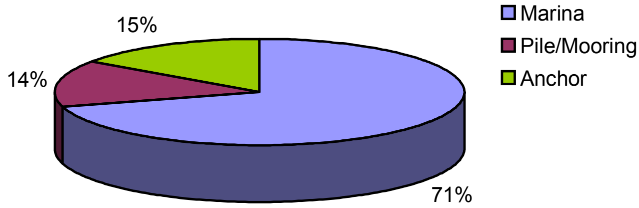
3.4 AVERAGE NIGHTS SPENT AS A VISITOR USING DIFFERENT TYPES OF MOORINGS

Overall the most popular mooring facility used by visitors during a cruising trip is a marina (70.7%), with an average duration of 31.6 nights spent as a visitor at other marinas per year.

Table 14: Average nights spent as a visitor using different types of mooring facilities

All locations		
Base	1317	%
IN MARINA	31.61	70.7%
ON A PILE/MOORING	6.33	14.2%
AT ANCHOR	6.78	15.2%
Total visitor nights per yea	44.72	

Figure 3: Nights spent on different types of mooring



3.5 PORTS, HARBOURS & MARINAS VISITED MOST FREQUENTLY OVER THE PREVIOUS YEAR

A large number of different ports, harbours and marinas frequented over the previous year were cited and listed in Table 15a overleaf. Respondents were invited to name the three most frequented ports, harbours or/and marinas in the previous year.

Among domestic visitors, Cowes on the Isle of Wight was the most frequented location. Overall, 16.9% mentioned Cowes. Results split by first, second and third most frequented location indicated that around 22.6% named Cowes as their first most frequented location, 14.9% named Cowes as their second most frequented location and 12.8% named Cowes as their third most frequented location. The next two most frequented location by domestic visitors was Yarmouth, also on the Isle of Wight and Lymington in Hampshire[3].

[3] Many respondents did not provide details of the actual marina/harbour in Cowes or Lymington. Therefore the results have been aggregated.

Table 15a : Ports & Harbours visited most frequently over the previous year – all DOMESTIC visiting yachts

	Overall		First most frequented	Second most frequented	Third most frequented
		3353	1161	1127	1065
Cowes, IoW	567	16.9%	22.6%	14.9%	12.8%
Yarmouth, IoW	393	11.7%	16.2%	9.9%	8.8%
Lymington, Hampshire	330	9.8%	8.8%	11.7%	8.9%
Poole, Dorset	162	4.9%	5.4%	4.2%	5.0%
Cherbourg, France	117	3.5%	3.3%	3.4%	3.9%
Hamble, Hampshire	106	3.2%	2.7%	3.3%	3.7%
Gosport, Hampshire	95	2.8%	2.4%	2.2%	3.9%
Beaulieu River/Bucklers Hard, Hampshire	83	2.5%	1.0%	3.9%	2.6%
Ramsgate, Kent	83	2.5%	4.3%	1.3%	1.8%
Bembridge, IoW	80	2.4%	2.4%	2.2%	2.5%
Weymouth, Dorset	79	2.4%	0.8%	2.8%	3.6%
Port Solent, Hampshire	65	1.9%	2.0%	2.0%	1.8%
Guernsey, Channel Islands	64	1.9%	0.9%	1.9%	3.0%
Chichester, West Sussex	61	1.8%	0.6%	2.4%	2.5%
Dartmouth, Devon	55	1.6%	1.3%	2.4%	1.2%
Brighton, East Sussex	54	1.6%	1.9%	1.0%	2.0%
Portsmouth, Hampshire	51	1.5%	1.4%	1.9%	1.2%
Newtown River, IoW	50	1.5%	0.6%	2.1%	1.9%
Medina River/ Folly Inn/ Newport, IoW	48	1.4%	0.9%	1.9%	1.5%
Southampton (Ocean Village), Hampshire	40	1.2%	0.5%	1.4%	1.8%
Eastbourne (Sovereign), East Sussex	37	1.1%	0.7%	1.8%	0.8%
Dover, Kent	34	1.0%	1.1%	0.8%	1.2%
Ipswich, Suffolk	27	0.8%	1.3%	0.6%	0.5%
Calais, France	27	0.8%	1.0%	1.0%	0.4%
Plymouth, Devon	26	0.8%	0.8%	1.0%	0.5%
St Vaast, France	26	0.8%	0.9%	0.2%	1.2%
Burnham on Crouch, Essex	23	0.7%	1.0%	0.7%	0.3%
Brightlingsea, Essex	19	0.6%	0.6%	0.5%	0.6%
Falmouth, Cornwall	19	0.6%	0.6%	0.4%	0.7%
Braye, Alderney	19	0.6%	0.1%	0.2%	1.5%
Salcombe, Devon	19	0.6%	0.2%	0.6%	0.9%
St Katherines Dock, London	16	0.5%	0.5%	0.6%	0.3%
Jersey, Channel Islands	16	0.5%	0.4%	0.3%	0.8%
Fecamp, France	16	0.5%	0.5%	0.6%	0.4%
Woolverstone, Essex	15	0.5%	0.3%	0.6%	0.5%
French ports (not specified)	15	0.5%	0.3%	0.7%	0.4%
Swanwick/ Bursledon/ Moody's, Hampshire	14	0.4%	0.3%	0.6%	0.4%
Hayling Island/Langstone Harbour	13	0.4%	0.6%	0.3%	0.3%
Harwich, Essex	12	0.4%	0.2%	0.3%	0.5%
Shotley Point, Essex	12	0.4%	0.2%	0.7%	0.1%
Torquay, Devon	12	0.4%	0.1%	0.7%	0.2%
St Malo, France	12	0.4%	0.3%	0.4%	0.3%
Boulogne, France	12	0.4%	0.1%	0.8%	0.2%
London (including inland River Thames)	11	0.3%	0.7%	0.1%	0.2%
Ryde/Fishbourne, IoW	10	0.3%	0.1%	0.3%	0.7%
Chatham, Kent	10	0.3%	0.2%	0.2%	0.5%
OTHER DESTINATIONS (mentioned by less than 10 respondents)	299	9.3%	2.7%	2.7%	3.9%

The overseas visitors' experience was rather different. Coastal harbours and marinas in Dover in Kent, Brighton in East Sussex and Oostende in Belgium were by far the most frequented locations by boat. Table 15c to 15n presents result cross-tabulated with home ports.

Table 15b : Ports & Harbours visited most frequently over the previous year – all OVERSEAS visiting yachts

	Overall		First most frequented	Second most frequented	Third most frequented
		636	222	214	199
Dover, Kent	59	9.3%	12.6%	6.9%	8.1%
Brighton, East Sussex	41	6.5%	3.5%	9.3%	6.8%
Oostende, Belgium	33	5.1%	5.8%	4.0%	5.6%
Cowes, IoW	28	4.3%	4.4%	2.0%	6.9%
Ramsgate, Kent	27	4.3%	6.9%	3.7%	2.0%
Enkhuizen, Netherlands	26	4.0%	7.6%	1.1%	3.2%
Scheveningen, Netherlands	24	3.7%	2.3%	7.7%	1.0%
Netherlands ports (not specified)	23	3.7%	2.4%	5.1%	3.5%
Eastbourne (Sovereign), East Sussex	21	3.3%	1.1%	4.7%	4.4%
Swedish & Finnish ports (various)	13	2.1%	4.0%	1.5%	0.6%
Nieuwpoort, Belgium	13	2.1%	2.6%	1.4%	2.3%
Danish ports (various)	12	1.9%	0.9%	2.4%	2.5%
London (non-specific, inc. inland Thames)	11	1.7%	1.5%	2.4%	1.1%
Caribbean Islands (various)	11	1.7%	1.7%	1.8%	1.9%
Zierikzee, Netherlands	10	1.6%	2.3%	1.5%	1.1%
Texel, Netherlands	10	1.6%	0.8%	0.5%	3.5%
Guernsey, Channel Islands	9	1.5%	1.1%	2.7%	0.5%
Dunkerque, France	9	1.5%	0.6%	1.4%	2.4%
Blankenberge, Belgium	9	1.5%	1.5%	1.1%	1.6%
Hoorn, Netherlands	9	1.5%	1.5%	1.9%	1.0%
Breskens, Netherlands	9	1.4%	1.8%	1.4%	0.9%
Stavoren, Netherlands	9	1.4%	0.4%	3.0%	0.8%
Medemblik, Netherlands	8	1.3%	1.9%	0.9%	1.1%
Hindeloopen, Netherlands	8	1.3%	0.4%	2.8%	0.5%
German ports (various)	8	1.3%	3.2%	-	0.5%
Ijmuiden, Netherlands	8	1.3%	1.0%	1.5%	1.2%
Yarmouth, IoW	7	1.1%	-	0.5%	3.1%
Ipswich, Suffolk	6	1.0%	0.5%	1.0%	1.2%
Cherbourg, France	6	1.0%	-	1.1%	2.0%
Gosport, Hampshire	5	0.8%	0.2%	1.5%	0.7%
Lowestoft, Suffolk	5	0.8%	1.5%	0.2%	0.5%
Roompot, Netherlands	5	0.8%	1.7%	0.2%	0.5%
Zeebrugge, Belgium	5	0.8%	1.1%	1.2%	0.1%
St Malo, France	5	0.8%	-	-	2.5%
Portsmouth, Hampshire	4	0.6%	0.2%	0.9%	0.8%
Falmouth, Cornwall	4	0.6%	0.7%	-	1.1%
Amsterdam, Netherlands	4	0.6%	0.4%	1.3%	-
Vlissingen, Netherlands	4	0.6%	0.5%	0.2%	1.2%
Antwerp, Belgium	4	0.6%	0.5%	0.7%	0.5%
Norwegian Ports	4	0.6%	0.7%	0.5%	0.5%
IoW/Solent (non-specific)	4	0.6%	-	-	1.9%
Hellevoetslius, Netherlands	3	0.5%	1.4%	-	0.2%
Goes, Netherlands	3	0.5%	0.5%	0.8%	0.3%
Lemmer, Netherlands	3	0.5%	0.6%	-	1.0%
Beaulieu River/Bucklers Hard, Hampshire	3	0.5%	0.7%	0.4%	0.5%
Dieppe, France	3	0.5%	0.5%	-	0.8%
Deauville, France	3	0.5%	1.5%	-	-
Makkum, Netherlands	3	0.5%	-	0.9%	0.5%
Colynsplaat, Netherlands	3	0.5%	-	1.3%	-
Azores ports (port not specified)	3	0.5%	-	1.0%	0.5%
OTHER DESTINATIONS (mentioned by less than 3 respondents)	83	14.0%	13.4%	14.0%	14.9%

Table 15c: Ports & harbours visited most frequently by East Coast boats (home ports north of Thames Estuary)

	Overall	First most frequented	Second most frequented	Third most frequented
	318	108	108	102
Ramsgate, Kent	10.7%	17.6%	6.5%	7.8%
Ipswich, Suffolk	6.6%	11.1%	5.6%	2.9%
Brighton, East Sussex	4.4%	4.6%	5.6%	2.9%
St Katherines Dock, London	3.5%	1.9%	6.5%	2.0%
Dover, Kent	3.5%	4.6%	1.9%	3.9%
Woolverstone, Essex	3.5%	3.7%	4.6%	2.0%
Burnham on Crouch, Essex	3.1%	7.4%	1.9%	-
Brightlingsea, Essex	3.1%	3.7%	1.9%	3.9%
Calais, FR	3.1%	2.8%	1.9%	4.9%
Cowes, IoW	2.5%	0.9%	0.9%	5.9%
Harwich, Essex	2.5%	3.7%	1.9%	2.0%
Levington, River Orwell, Suffolk	2.5%	2.8%	2.8%	2.0%
Lowestoft, Suffolk	2.5%	2.8%	2.8%	2.0%
Shotley Point, Essex	2.5%	2.8%	3.7%	1.0%
Bradwell, Essex	2.5%	3.7%	2.8%	1.0%
Titchmarsh, Essex	1.9%	0.9%	3.7%	1.0%
Chatham, Kent	1.9%	1.9%	2.8%	1.0%
Gosport, Hampshire	1.6%	-	2.8%	2.0%
Eastbourne (Sovereign), East Sussex	1.6%	-	2.8%	2.0%
Falmouth, Cornwall	1.6%	1.9%	0.9%	2.0%
Boulogne, FR	1.6%	-	3.7%	1.0%
Dartmouth, Devon	1.3%	-	3.7%	-
Cherbourg, FR	1.3%	-	0.9%	2.9%
Dieppe, FR	1.3%	-	0.9%	2.9%
Oostende, BEL	1.3%	-	2.8%	1.0%
Lymington, Hampshire	0.9%	0.9%	-	2.0%
Poole, Dorset	0.9%	1.9%	0.9%	-
Yarmouth, IoW	0.9%	-	0.9%	2.0%
Gillingham, Kent	0.9%	1.9%	-	1.0%
Weymouth, Dorset	0.9%	-	2.8%	-
Hull, Humberside	0.9%	1.9%	0.9%	-
Nieuwpoort, BEL	0.9%	-	-	2.9%
Cork/ Crosshaven, Eire	0.9%	0.9%	1.9%	-
Hamble, Hampshire	0.6%	0.9%	-	1.0%
Hayling Island/Langstone Harbour	0.6%	-	0.9%	1.0%
London (non-specific, including inland River Thames)	0.6%	0.9%	0.9%	-
Plymouth, Devon	0.6%	0.9%	-	1.0%
Tollesbury, Essex	0.6%	-	-	2.0%
Jersey, CI	0.6%	-	-	2.0%
Guernsey, CI	0.6%	-	0.9%	1.0%
Ijmuiden, NL	0.6%	1.9%	-	-
Netherlands (port not specified)	0.6%	0.9%	0.9%	-
Braye, Alderney	0.6%	0.9%	-	1.0%
Fambridge, Essex (R.Crouch)	0.6%	-	0.9%	1.0%
Woodbridge/Waldringfield/Ramsholt, Suffolk	0.6%	0.9%	-	1.0%
Scottish ports (other various)	0.6%	-	0.9%	1.0%
Swanwick/ Bursledon/ Moody's, Hampshire	0.3%	-	-	1.0%
Southampton (Ocean Village), Hampshire	0.3%	-	-	1.0%
Port Solent, Hampshire	0.3%	-	0.9%	-
OTHER DESTINATIONS (mentioned by less than 3 respondents)	11.1%	6.3%	9.9%	19.0%

Table 15d: Ports & harbours visited most frequently by boats from home ports between Dover and the Thames Estuary

	Overall	First most frequented	Second most frequented	Third most frequented
	198	70	68	60
Ramsgate, Kent	19.2%	32.9%	10.3%	13.3%
Calais, FR	7.6%	10.0%	10.3%	1.7%
Dover, Kent	7.1%	5.7%	7.4%	8.3%
Brighton, East Sussex	6.6%	2.9%	2.9%	15.0%
Eastbourne (Sovereign), East Sussex	5.1%	-	13.2%	1.7%
Boulogne, FR	4.0%	-	8.8%	3.3%
Burnham on Crouch, Essex	3.0%	-	5.9%	3.3%
Cowes, IoW	2.5%	1.4%	2.9%	3.3%
Brightlingsea, Essex	2.5%	2.9%	1.5%	3.3%
Portsmouth, Hampshire	2.0%	1.4%	2.9%	1.7%
Hamble, Hampshire	2.0%	5.7%	-	-
St Katherines Dock, London	2.0%	2.9%	1.5%	1.7%
London (non-specific, including inland River Thames)	2.0%	2.9%	-	3.3%
Chatham, Kent	2.0%	1.4%	1.5%	3.3%
Dartmouth, Devon	2.0%	4.3%	-	1.7%
Queenborough, Kent	2.0%	2.9%	1.5%	1.7%
Southampton (Ocean Village), Hampshire	1.5%	-	2.9%	1.7%
Yarmouth, IoW	1.5%	1.4%	-	3.3%
Oostende, BEL	1.5%	-	2.9%	1.7%
Lymington, Hampshire	1.0%	1.4%	-	1.7%
Poole, Dorset	1.0%	2.9%	-	-
Port Solent, Hampshire	1.0%	1.4%	1.5%	-
Hayling Island/Langstone Harbour	1.0%	2.9%	-	-
Chichester, West Sussex	1.0%	-	2.9%	-
Felixstowe, Essex	1.0%	-	1.5%	1.7%
Guernsey, CI	1.0%	1.4%	1.5%	-
Cherbourg, FR	1.0%	1.4%	1.5%	-
Dieppe, FR	1.0%	1.4%	-	1.7%
Nieuwpoort, BEL	1.0%	-	1.5%	1.7%
Southsea, Hampshire	0.5%	-	-	1.7%
Gosport, Hampshire	0.5%	-	1.5%	-
Hythe Marina, Hampshire	0.5%	1.4%	-	-
Bembridge, IoW	0.5%	-	-	1.7%
Littlehampton, West Sussex	0.5%	-	1.5%	-
Harwich, Essex	0.5%	-	-	1.7%
Lowestoft, Suffolk	0.5%	1.4%	-	-
Bray Marine, River Thames	0.5%	-	-	1.7%
Torquay, Devon	0.5%	-	1.5%	-
Hoo, River Medway, Kent	0.5%	-	1.5%	-
Tollesbury, Essex	0.5%	-	-	1.7%
USA PORTS	0.5%	1.4%	-	-
Dunkerque, FR	0.5%	1.4%	-	-
Nieuwpoort, NL	0.5%	1.4%	-	-
Ghent, BEL	0.5%	-	-	1.7%
Middelburg, NL	0.5%	-	-	1.7%
Netherlands (port not specified)	0.5%	-	-	1.7%
AZORES PORTS (port not specified)	0.5%	-	1.5%	-
Deauville, FR	0.5%	-	-	1.7%
Brest, FR	0.5%	1.4%	-	-
OTHER DESTINATIONS (mentioned by less than 3 respondents)	3.9%	0.1%	5.7%	4.6%

Table 15e: Ports & harbours visited most frequently by boats from Eastern Channel home ports (Worthing to Dover)

	Overall	First most frequented	Second most frequented	Third most frequented
	131	47	45	39
Eastbourne (Sovereign), East Sussex	13.0%	14.9%	8.9%	15.4%
Brighton, East Sussex	12.2%	25.5%	6.7%	2.6%
Cowes, IoW	9.9%	4.3%	11.1%	15.4%
Fecamp, FR	9.2%	6.4%	8.9%	12.8%
Gosport, Hampshire	6.9%	6.4%	6.7%	7.7%
Chichester, West Sussex	6.1%	4.3%	8.9%	5.1%
Lymington, Hampshire	4.6%	4.3%	4.4%	5.1%
Port Solent, Hampshire	4.6%	6.4%	4.4%	2.6%
Dieppe, FR	3.8%	2.1%	8.9%	-
Portsmouth, Hampshire	2.3%	2.1%	2.2%	2.6%
Bembridge, IoW	2.3%	4.3%	-	2.6%
Hayling Island/Langstone Harbour	2.3%	-	6.7%	-
Southsea, Hampshire	1.5%	-	-	5.1%
Poole, Dorset	1.5%	2.1%	2.2%	-
Hamble, Hampshire	1.5%	2.1%	2.2%	-
Littlehampton, West Sussex	1.5%	-	-	5.1%
Plymouth, Devon	1.5%	-	4.4%	-
Falmouth, Cornwall	1.5%	4.3%	-	-
Cherbourg, FR	1.5%	2.1%	2.2%	-
Boulogne, FR	1.5%	4.3%	-	-
Shoreham, W.Sussex	1.5%	2.1%	2.2%	-
Medina River/ Folly Inn/ Newport, IoW	0.8%	-	2.2%	-
Newhaven, East Sussex	0.8%	-	-	2.6%
Dover, Kent	0.8%	-	2.2%	-
Chatham, Kent	0.8%	-	-	2.6%
Weymouth, Dorset	0.8%	-	2.2%	-
Brixham, Devon	0.8%	-	-	2.6%
Guernsey, CI	0.8%	-	-	2.6%
Le Havre, FR	0.8%	-	2.2%	-
St Vaast, FR	0.8%	2.1%	-	-
Fowey, Cornwall	0.8%	-	-	2.6%
Scilly Islands	0.8%	-	-	2.6%
Rye, E.Sussex	0.8%	-	-	2.6%

Table 15f: Ports & harbours visited most frequently by boats from home ports between Littlehampton & Langstone Harbour

	Overall	First most frequented	Second most frequented	Third most frequented
	540	184	182	174
Cowes, IoW	22.4%	26.6%	27.5%	12.6%
Yarmouth, IoW	10.6%	9.8%	9.3%	12.6%
Lymington, Hampshire	10.4%	13.0%	10.4%	7.5%
Bembridge, IoW	6.7%	10.3%	4.9%	4.6%
Gosport, Hampshire	4.3%	4.9%	5.5%	2.3%
Hamble, Hampshire	4.1%	2.7%	3.3%	6.3%
Poole, Dorset	3.9%	1.1%	6.0%	4.6%
Portsmouth, Hampshire	3.5%	3.8%	3.3%	3.4%
Beaulieu River/Bucklers Hard, Hampshire	3.5%	-	5.5%	5.2%
Port Solent, Hampshire	3.1%	4.3%	1.1%	4.0%
Cherbourg, FR	3.1%	2.7%	3.3%	3.4%
Weymouth, Dorset	2.8%	0.5%	2.2%	5.7%
Newtown River, IoW	2.2%	2.2%	1.6%	2.9%
Medina River/ Folly Inn/ Newport, IoW	2.2%	1.6%	2.7%	2.3%
Chichester, West Sussex	2.2%	1.6%	2.2%	2.9%
Guernsey, CI	1.5%	0.5%	1.6%	2.3%
Dartmouth, Devon	1.3%	-	1.6%	2.3%
Brighton, East Sussex	1.1%	1.1%	0.5%	1.7%
St Vaast, FR	1.1%	1.6%	0.5%	1.1%
Southsea, Hampshire	0.9%	1.6%	-	1.1%
Southampton (Ocean Village), Hampshire	0.6%	-	-	1.7%
Ryde/Fishbourne, IoW	0.6%	0.5%	1.1%	-
Hayling Island/Langstone Harbour	0.6%	1.6%	-	-
Plymouth, Devon	0.6%	-	0.5%	1.1%
Bosham, West Sussex	0.4%	-	0.5%	0.6%
Eastbourne (Sovereign), East Sussex	0.4%	-	0.5%	0.6%
Ramsgate, Kent	0.4%	0.5%	0.5%	-
Dover, Kent	0.4%	0.5%	-	0.6%
Mylor Yacht Harbour, Cornwall	0.4%	-	-	1.1%
Jersey, CI	0.4%	1.1%	-	-
St Malo, FR	0.4%	-	0.5%	0.6%
Braye, Alderney	0.4%	-	-	1.1%
Christchurch, Dorset	0.2%	-	-	0.6%
Swanwick/ Bursledon/ Moody's, Hampshire	0.2%	-	0.5%	-
Itchenor, West Sussex	0.2%	0.5%	-	-
Brightlingsea, Essex	0.2%	0.5%	-	-
St Katherines Dock, London	0.2%	0.5%	-	-
Gillingham, Kent	0.2%	0.5%	-	-
Swanage/ Studland/ Lulworth, Dorset	0.2%	-	-	0.6%
Le Havre, FR	0.2%	-	-	0.6%
Vlissingen, NL	0.2%	-	0.5%	-
Oostende, BEL	0.2%	0.5%	-	-
Nieuwpoort, BEL	0.2%	-	0.5%	-
Netherlands (port not specified)	0.2%	0.5%	-	-
Morlaix, FR	0.2%	-	0.5%	-
Dordrecht, NL	0.2%	-	-	0.6%
Salcombe, Devon	0.2%	-	-	0.6%
Fowey, Cornwall	0.2%	-	0.5%	-
Darthaven, Devon	0.2%	0.5%	-	-
OTHER DESTINATIONS (mentioned by less than 3 respondents)	0.4%	0.5	-	0.6%

Table 15g: Ports & harbours visited most frequently by boats from Solent & Isle of Wight home ports (Forts to the Needles)

	Overall	First most frequented	Second most frequented	Third most frequented
	1729	598	584	547
Cowes, IoW	19.6%	29.6%	17.0%	11.5%
Yarmouth, IoW	14.6%	17.1%	14.9%	11.7%
Lymington, Hampshire	13.1%	12.0%	15.1%	12.1%
Poole, Dorset	6.9%	7.2%	6.0%	7.5%
Cherbourg, FR	3.9%	3.8%	3.1%	4.9%
Hamble, Hampshire	3.6%	2.7%	3.8%	4.6%
Beaulieu River/Bucklers Hard, Hampshire	3.4%	1.7%	5.0%	3.5%
Port Solent, Hampshire	2.8%	4.2%	2.2%	2.0%
Weymouth, Dorset	2.5%	1.5%	2.2%	4.0%
Chichester, West Sussex	2.4%	0.8%	2.7%	3.8%
Gosport, Hampshire	2.4%	2.0%	1.7%	3.5%
Bembridge, IoW	2.1%	1.2%	2.2%	2.9%
Medina River/ Folly Inn/ Newport, IoW	2.0%	2.2%	1.7%	2.0%
Newtown River, IoW	1.8%	1.0%	2.2%	2.2%
Dartmouth, Devon	1.7%	0.7%	2.1%	2.4%
Guernsey, CI	1.7%	0.8%	1.7%	2.6%
Portsmouth, Hampshire	1.7%	1.7%	1.9%	1.6%
Southampton (Ocean Village), Hampshire	1.2%	0.7%	1.5%	1.5%
Braye, Alderney	0.8%	0.3%	0.3%	1.6%
Plymouth, Devon	0.8%	0.8%	0.7%	0.9%
St Vaast, FR	0.8%	0.7%	0.5%	1.3%
Swanwick/ Bursledon/ Moody's, Hampshire	0.8%	0.7%	1.0%	0.7%
Brighton, East Sussex	0.6%	1.0%	0.3%	0.5%
Jersey, CI	0.6%	0.3%	0.9%	0.5%
Ryde/Fishbourne, IoW	0.6%	0.2%	0.7%	1.1%
Falmouth, Cornwall	0.5%	0.2%	0.5%	0.7%
Torquay, Devon	0.5%	0.2%	1.0%	0.4%
Hayling Island/Langstone Harbour	0.4%	0.3%	0.5%	0.4%
Hythe Marina, Hampshire	0.3%	0.5%	0.3%	0.2%
Salcombe, Devon	0.3%	0.2%	-	0.9%
Brixham, Devon	0.2%	-	0.3%	0.2%
Eastbourne (Sovereign), East Sussex	0.2%	-	0.2%	0.5%
Fowey, Cornwall	0.2%	-	0.7%	-
GERMAN PORTS (various)	0.2%	0.2%	0.2%	0.4%
Lezardrieux, FR	0.2%	-	-	0.5%
Netherlands (port not specified)	0.2%	0.3%	-	0.2%
Newton Ferrers, Devon	0.2%	-	0.5%	-
Ramsgate, Kent	0.2%	0.3%	0.2%	0.2%
Southsea, Hampshire	0.2%	0.3%	-	0.2%
SPANISH PORTS (various/ port not specified)	0.2%	-	0.2%	0.4%
St Malo, FR	0.2%	-	0.3%	0.2%
Swanage/ Studland/ Lulworth, Dorset	0.2%	0.2%	0.3%	-
SWEDISH & FINNISH PORTS (various)	0.2%	0.5%	0.2%	-
Birdham Pool, West Sussex	0.1%	-	0.2%	-
Burnham on Crouch, Essex	0.1%	-	0.2%	-
Calais, FR	0.1%	-	-	0.2%
Calshot/ Ashlett Creek	0.1%	0.2%	-	-
Carentan, FR	0.1%	-	-	0.2%
CARIBBEAN ISLANDS (various)	0.1%	-	0.2%	-
OTHER DESTINATIONS (mentioned by less than 3 respondents)	2.6%	1.7%	2.6%	3.3%

Table 15h: Ports & harbours visited most frequently by boats from home ports between Poole & Weymouth

	Overall	First most frequented	Second most frequented	Third most frequented
	315	113	103	99
Yarmouth, IoW	17.1%	30.1%	13.6%	6.1%
Cowes, IoW	14.3%	11.5%	17.5%	14.1%
Lymington, Hampshire	14.0%	13.3%	15.5%	13.1%
Poole, Dorset	12.7%	22.1%	8.7%	6.1%
Weymouth, Dorset	8.3%	4.4%	11.7%	9.1%
Cherbourg, FR	3.2%	3.5%	2.9%	3.0%
Port Solent, Hampshire	2.9%	1.8%	-	7.1%
Beaulieu River/Bucklers Hard, Hampshire	2.5%	2.7%	1.9%	3.0%
Guernsey, CI	2.5%	0.9%	2.9%	4.0%
Hamble, Hampshire	2.2%	-	2.9%	4.0%
Newtown River, IoW	2.2%	0.9%	2.9%	3.0%
Southampton (Ocean Village), Hampshire	1.9%	-	2.9%	3.0%
Chichester, West Sussex	1.9%	1.8%	1.9%	2.0%
Dartmouth, Devon	1.9%	1.8%	2.9%	1.0%
Bembridge, IoW	1.6%	-	-	5.1%
Swanage/ Studland/ Lulworth, Dorset	1.3%	0.9%	1.0%	2.0%
Gosport, Hampshire	1.0%	-	1.9%	1.0%
Medina River/ Folly Inn/ Newport, IoW	1.0%	-	1.9%	1.0%
Falmouth, Cornwall	1.0%	0.9%	-	2.0%
Salcombe, Devon	1.0%	-	1.0%	2.0%
Southsea, Hampshire	0.6%	-	1.0%	1.0%
Portsmouth, Hampshire	0.6%	-	-	2.0%
Hythe Marina, Hampshire	0.6%	1.8%	-	-
St Malo, FR	0.6%	-	-	2.0%
Christchurch, Dorset	0.3%	0.9%	-	-
Bosham, West Sussex	0.3%	-	1.0%	-
Wareham, Dorset	0.3%	-	1.0%	-
Plymouth, Devon	0.3%	-	1.0%	-
Torquay, Devon	0.3%	-	-	1.0%
Brixham, Devon	0.3%	-	1.0%	-
Stromness	0.3%	0.9%	-	-
Fowey, Cornwall	0.3%	-	-	1.0%
IoW/Solent (non-specific)	0.3%	-	1.0%	-
French ports (not specified)	0.3%	-	-	1.0%

Table 15i: Ports & harbours visited most frequently by boats from Western Channel home ports (including Channel Islands & West Country)

	Overall	First most frequented	Second most frequented	Third most frequented
	91	32	30	29
Guernsey, CI	13.2%	18.8%	16.7%	3.4%
Dartmouth, Devon	9.9%	15.6%	13.3%	-
Salcombe, Devon	6.6%	3.1%	10.0%	6.9%
Cherbourg, FR	5.5%	-	10.0%	6.9%
Poole, Dorset	4.4%	9.4%	-	3.4%
Plymouth, Devon	4.4%	6.3%	3.3%	3.4%
Falmouth, Cornwall	4.4%	3.1%	3.3%	6.9%
French ports (not specified)	4.4%	3.1%	6.7%	3.4%
Hamble, Hampshire	3.3%	9.4%	-	-
Cowes, IoW	3.3%	6.3%	-	3.4%
Weymouth, Dorset	3.3%	-	10.0%	-
Brixham, Devon	3.3%	3.1%	3.3%	3.4%
Braye, Alderney	3.3%	-	3.3%	6.9%
St Quay Portrieux, FR	3.3%	3.1%	3.3%	3.4%
Swanwick/ Bursledon/ Moody's, Hampshire	2.2%	3.1%	3.3%	-
Hayling Island/Langstone Harbour	2.2%	-	-	6.9%
Brighton, East Sussex	2.2%	-	-	6.9%
Jersey, CI	2.2%	-	-	6.9%
St Malo, FR	2.2%	3.1%	3.3%	-
Fowey, Cornwall	2.2%	6.3%	-	-
Fareham Quay/Wicormarine, Hampshire	1.1%	-	-	3.4%
Beaulieu River/Bucklers Hard, Hampshire	1.1%	-	3.3%	-
Chichester, West Sussex	1.1%	-	-	3.4%
Harwich, Essex	1.1%	-	-	3.4%
Totnes, Devon	1.1%	3.1%	-	-
Torquay, Devon	1.1%	-	3.3%	-
Le Havre, FR	1.1%	-	-	3.4%
Copenhagen, DEN	1.1%	3.1%	-	-
Monnickendam, NL	1.1%	-	-	3.4%
SOUTH BRITTANY PORTS, FR	1.1%	-	-	3.4%
Lyme Regis, Dorset	1.1%	-	-	3.4%
Dahouet, FR	1.1%	-	-	3.4%
Lezardrieux, FR	1.1%	-	3.3%	-

Table 15j: Ports & harbours visited most frequently by boats from home ports in Wales, NW England, Ireland & Scotland

	Overall	First most frequented	Second most frequented	Third most frequented
	43	15	14	14
SCOTTISH PORTS (other various)	14.0%	13.3%	14.3%	14.3%
Cowes, IoW	7.0%	13.3%	-	7.1%
Bangor, NI	7.0%	6.7%	7.1%	7.1%
Douglas, IoM	4.7%	13.3%	-	-
Falmouth, Cornwall	4.7%	-	-	14.3%
Glenarm, NI	4.7%	-	14.3%	-
Beaulieu River/Bucklers Hard, Hampshire	2.3%	-	7.1%	-
Lymington, Hampshire	2.3%	-	-	7.1%
Poole, Dorset	2.3%	-	7.1%	-
Yarmouth, IoW	2.3%	-	-	7.1%
Port Solent, Hampshire	2.3%	-	7.1%	-
Levington, River Orwell, Suffolk	2.3%	-	7.1%	-
Dover, Kent	2.3%	-	-	7.1%
Weymouth, Dorset	2.3%	-	7.1%	-
Barrow, Cumbria	2.3%	-	-	7.1%
Strangford Lough, NI	2.3%	-	-	7.1%
Dunkerque, FR	2.3%	-	7.1%	-
Fleetwood, Lancs	2.3%	-	7.1%	-
Breskens, NL	2.3%	6.7%	-	-
Carrickfergus, NI	2.3%	6.7%	-	-
Caernarvon, N Wales	2.3%	6.7%	-	-
Inchcolm, Scotland	2.3%	6.7%	-	-
Ballycastle, NI	2.3%	-	-	7.1%
Aardglass, Scotland	2.3%	6.7%	-	-
Kip, Scotland	2.3%	6.7%	-	-
Rhu, Scotland	2.3%	-	7.1%	-
Largs, Scotland	2.3%	-	-	7.1%
Padstow, Cornwall	2.3%	-	7.1%	-
Watchet, Somerset	2.3%	6.7%	-	-
Cork/ Crosshaven, Eire	2.3%	6.7%	-	-
Southern Irish ports	2.3%	-	-	7.1%

Table 15k: Ports & harbours visited most frequently by boats from home ports in France

	Overall	First most frequented	Second most frequented	Third most frequented
	47	17	16	14
Brighton, East Sussex	12.8%	11.8%	25.0%	-
Cowes, IoW	8.5%	5.9%	6.3%	14.3%
Ramsgate, Kent	8.5%	5.9%	6.3%	14.3%
Eastbourne (Sovereign), East Sussex	6.4%	-	6.3%	14.3%
Dover, Kent	6.4%	11.8%	-	7.1%
Guernsey, CI	6.4%	11.8%	6.3%	-
Nieuwpoort, BEL	6.4%	17.6%	-	-
Portsmouth, Hampshire	4.3%	-	-	14.3%
Gosport, Hampshire	4.3%	-	6.3%	7.1%
Dieppe, FR	4.3%	5.9%	-	7.1%
Oostende, BEL	4.3%	-	6.3%	7.1%
Hamble, Hampshire	2.1%	-	6.3%	-
Jersey, CI	2.1%	5.9%	-	-
Cherbourg, FR	2.1%	-	6.3%	-
Le Havre, FR	2.1%	5.9%	-	-
Trebeurden, Brittany, FR	2.1%	-	6.3%	-
Breskens, NL	2.1%	-	6.3%	-
Netherlands (port not specified)	2.1%	5.9%	-	-
Morlaix, FR	2.1%	-	-	7.1%
Fecamp, FR	2.1%	-	6.3%	-
St Malo, FR	2.1%	-	-	7.1%
St Valery sur Somme, FR	2.1%	5.9%	-	-
Brest, FR	2.1%	5.9%	-	-
Braye, Alderney	2.1%	-	6.3%	-

Table 15l: Ports & harbours visited most frequently by boats from home ports in the Netherlands & Belgium

	Overall	First most frequented	Second most frequented	Third most frequented
	436	152	145	139
Dover, Kent	9.9%	13.2%	8.3%	7.9%
Brighton, East Sussex	6.7%	4.6%	9.7%	5.8%
Oostende, BEL	6.0%	7.9%	3.4%	6.5%
Ramsgate, Kent	4.6%	7.9%	2.8%	2.9%
Netherlands (port not specified)	4.1%	3.9%	4.1%	4.3%
Enkhuizen, NL	3.9%	5.9%	1.4%	4.3%
Eastbourne (Sovereign), East Sussex	3.9%	2.0%	4.8%	5.0%
Cowes, IoW	3.7%	3.9%	2.1%	5.0%
Nieuwpoort, BEL	3.0%	2.6%	2.8%	3.6%
Scheveningen, NL	2.3%	2.0%	4.1%	0.7%
Ijmuiden, NL	2.3%	2.0%	2.8%	2.2%
Zierikzee, NL	2.1%	2.0%	2.8%	1.4%
Dunkerque, FR	2.1%	1.3%	2.1%	2.9%
Roompot, NL	1.8%	3.9%	0.7%	0.7%
Hoorn, NL	1.8%	2.6%	1.4%	1.4%
Breskens, NL	1.8%	2.6%	1.4%	1.4%
Blankenberge, BEL	1.8%	1.3%	2.1%	2.2%
Stavoren, NL	1.6%	0.7%	2.8%	1.4%
London (non-specific, including inland River Thames)	1.6%	1.3%	2.1%	1.4%
Hindeloopen, NL	1.6%	0.7%	3.4%	0.7%
Zeebrugge, BEL	1.4%	2.0%	1.4%	0.7%
Yarmouth, IoW	1.4%	-	0.7%	3.6%
Lowestoft, Suffolk	1.4%	2.6%	0.7%	0.7%
Guernsey, CI	1.4%	0.7%	2.8%	0.7%
Vlissingen, NL	1.1%	0.7%	0.7%	2.2%
Medemblik, NL	1.1%	1.3%	1.4%	0.7%
Hellevoetslius, NL	1.1%	2.6%	-	0.7%
Woolverstone, Essex	0.9%	-	1.4%	1.4%
Ipswich, Suffolk	0.9%	0.7%	1.4%	0.7%
Goes, NL	0.9%	0.7%	1.4%	0.7%
Yerseke, NL	0.7%	0.7%	0.7%	0.7%
Texel, NL	0.7%	0.7%	-	1.4%
SWEDISH & FINNISH PORTS (various)	0.7%	0.7%	0.7%	0.7%
Makkum, NL	0.7%	-	1.4%	0.7%
Lymington, Hampshire	0.7%	-	2.1%	-
Gosport, Hampshire	0.7%	0.7%	0.7%	0.7%
Deauville, FR	0.7%	2.0%	-	-
Bruimisse, NL	0.7%	-	2.1%	-
Beaulieu River/Bucklers Hard, Hampshire	0.7%	0.7%	0.7%	0.7%
Antwerp, BEL	0.7%	0.7%	0.7%	0.7%
Willenstad, NL	0.5%	-	-	1.4%
Weymouth, Dorset	0.5%	-	0.7%	0.7%
Portsmouth, Hampshire	0.5%	-	1.4%	-
Newhaven, East Sussex	0.5%	0.7%	-	0.7%
Lemmer, NL	0.5%	0.7%	-	0.7%
Herkingen, NL	0.5%	-	1.4%	-
Dartmouth, Devon	0.5%	-	-	1.4%
Colynsplaat, NL	0.5%	-	1.4%	-
Cherbourg, FR	0.5%	-	-	1.4%
OTHER DESTINATIONS	8.2%	9.1%	8.4%	11.2%
(mentioned by less than 3 respondents)	2.1%	-	-	3.1%

Table 15m: Ports & harbours visited most frequently by boats from home ports in Germany & Scandinavia

	Overall	First most frequented	Second most frequented	Third most frequented
	62	22	21	19
GERMAN PORTS (various)	12.9%	36.4%	-	-
Dover, Kent	8.1%	9.1%	9.5%	5.3%
SWEDISH & FINNISH PORTS (various)	8.1%	9.1%	9.5%	5.3%
Amsterdam, NL	6.5%	4.5%	14.3%	-
DANISH PORTS (various)	6.5%	4.5%	4.8%	10.5%
Netherlands (port not specified)	4.8%	-	-	15.8%
Norwegian Ports	4.8%	4.5%	4.8%	5.3%
Yarmouth, IoW	3.2%	-	-	10.5%
Falmouth, Cornwall	3.2%	4.5%	-	5.3%
Enkhuizen, NL	3.2%	4.5%	4.8%	-
Texel, NL	3.2%	4.5%	4.8%	-
Oostende, BEL	3.2%	-	4.8%	5.3%
Scheveningen, NL	3.2%	-	4.8%	5.3%
AZORES PORTS (port not specified)	3.2%	-	4.8%	5.3%
Helgoland, GER	3.2%	-	4.8%	5.3%
Eastbourne (Sovereign), East Sussex	1.6%	-	4.8%	-
Lemmer, NL	1.6%	4.5%	-	-
Medemblik, NL	1.6%	-	-	5.3%
Den Haag, NL	1.6%	4.5%	-	-
Blankenberge, BEL	1.6%	-	-	5.3%
Ondeschild, NL	1.6%	-	-	5.3%
Hoorn, NL	1.6%	-	4.8%	-
Vlieland, NL	1.6%	-	4.8%	-
Nieuwpoort, BEL	1.6%	-	4.8%	-
PORTUGESE PORTS (various/ port not specified)	1.6%	-	4.8%	-
SPANISH PORTS (various/ port not specified)	1.6%	4.5%	-	-
Stavoren, NL	1.6%	-	4.8%	-
Guatemala	1.6%	4.5%	-	-
ORKNEY ISLAND PORTS (Kirkwall, Stromness)	1.6%	-	-	5.3%

Table 15n: Ports & harbours visited most frequently by boats from home ports in any other overseas locations

	Overall	First most frequented	Second most frequented	Third most frequented
	41	16	14	11
Poole, Dorset	7.3%	12.5%	7.1%	-
Cowes, IoW	7.3%	12.5%	7.1%	-
Lymington, Hampshire	4.9%	-	14.3%	-
Hamble, Hampshire	4.9%	12.5%	-	-
Southampton (Ocean Village), Hampshire	4.9%	-	7.1%	9.1%
Yarmouth, IoW	4.9%	6.3%	-	9.1%
SWEDISH & FINNISH PORTS (various)	4.9%	6.3%	7.1%	-
DANISH PORTS (various)	4.9%	-	14.3%	-
Italian Ports	4.9%	6.3%	7.1%	-
Gosport, Hampshire	2.4%	-	-	9.1%
Beaulieu River/Bucklers Hard, Hampshire	2.4%	6.3%	-	-
Christchurch, Dorset	2.4%	-	-	9.1%
Hythe Marina, Hampshire	2.4%	-	-	9.1%
Newtown River, IoW	2.4%	-	-	9.1%
Chichester, West Sussex	2.4%	-	7.1%	-
Brighton, East Sussex	2.4%	-	-	9.1%
Ramsgate, Kent	2.4%	-	7.1%	-
St Katherines Dock, London	2.4%	6.3%	-	-
Dover, Kent	2.4%	-	7.1%	-
Falmouth, Cornwall	2.4%	-	7.1%	-
Enkhuizen, NL	2.4%	6.3%	-	-
GERMAN PORTS (various)	2.4%	6.3%	-	-
SPANISH PORTS (various/ port not specified)	2.4%	-	-	9.1%
Netherlands (port not specified)	2.4%	-	-	9.1%
Kiel, GER	2.4%	-	7.1%	-
Gothenburg, SWE	2.4%	-	-	9.1%
Fowey, Cornwall	2.4%	6.3%	-	-
Skagen, DEN	2.4%	6.3%	-	-
Norwegian Ports	2.4%	6.3%	-	-
IoW/Solent (non-specific)	2.4%	-	-	9.1%

3.6 WHAT FACTORS MOST IMPORTANT WHEN DECIDING ON A PLACE TO VISIT

Apart from tidal or weather considerations, the single most important factor when deciding on a marina or harbour to visit are facilities such as public showers and toilets (21.5%). This was followed by the location (7.8%), and having good restaurants/pubs nearby (7.4%). On the scale of importance, 26.6% indicated that facilities were the first most important aspect, 24.7% indicated it was the second most important aspect and 18.2% indicated it was the third most important aspect.

Table 16: Factors most important when deciding on a place to visit – crews visiting ALL SURVEY LOCATIONS

	Overall	First most important	Second most important	Third most important
Base	3894	1405	1322	1166
Facilities (i.e. showers and toilets)	21.5%	26.6%	24.7%	18.2%
Location	7.8%	13.1%	5.9%	3.6%
Good restaurants/pubs nearby	7.4%	3.1%	8.5%	11.4%
Price/ value for money	6.7%	5.5%	6.6%	8.3%
Accessibility/ ease of access	5.0%	6.2%	4.1%	4.6%
Local shops and amenities	4.5%	2.1%	5.1%	6.9%
Availability of water, fuel, electricity etc.	4.4%	2.5%	6.3%	4.6%
Helpful/efficient harbourmaster/staff	3.2%	2.1%	2.3%	5.6%
Friendliness/welcome (staff etc.)	2.8%	1.6%	2.2%	4.8%
Ambience/atmosphere	2.7%	3.0%	1.9%	3.1%
Cleanliness	2.4%	2.2%	3.5%	1.3%
Availability of suitable berths/moorings	2.1%	2.3%	1.8%	2.3%
Distance/convenience from the last port/home port/destination	2.1%	3.5%	0.9%	1.7%
Local entertainment/nightlife/ things to do	2.0%	1.0%	2.6%	2.6%
Town/city location - proximity to town/city	1.9%	1.7%	1.6%	2.6%
Peace & quiet/ tranquillity	1.9%	1.7%	2.3%	1.8%
Pleasant town/locality/environment	1.8%	2.1%	1.3%	2.1%
Walk ashore access from pontoons	1.8%	1.9%	1.1%	2.4%
Shelter from the wind/waves	1.7%	1.4%	1.7%	1.9%
Access at all states of the tide/ sufficient draught	1.5%	2.4%	1.1%	0.9%
Attractiveness/beauty of the location/ scenery	1.5%	1.8%	1.4%	1.2%
Security/ boat can be safely left	1.5%	1.5%	1.4%	1.5%
Walks/places to walk the dog	1.0%	0.6%	0.7%	1.8%
Good shops/ shopping facilities	1.0%	0.3%	1.7%	0.9%
Quality of the marina & its facilities	0.8%	0.7%	0.5%	1.3%
Ease of mooring	0.8%	1.1%	0.6%	0.7%
Interesting place/port	0.6%	0.3%	0.1%	1.5%
Convenience (generally)	0.5%	0.6%	0.5%	0.5%
Comfort	0.5%	0.6%	0.2%	0.6%
Safety	0.4%	0.9%	0.1%	0.3%
Time available	0.4%	0.5%	0.6%	0.0%
Uncrowded/feeling of space	0.4%	0.4%	0.4%	0.4%
Natural surroundings	0.4%	0.3%	0.2%	0.6%
Chandlery/marine supplies nearby	0.4%	0.1%	0.5%	0.5%
Beaches nearby	0.4%	0.5%	0.3%	0.3%
Pontoons well maintained/ good quality/ good size	0.3%	0.3%	0.2%	0.4%
Meeting other people/ club rally destination	0.3%	0.3%	0.0%	0.7%
Quiet at night	0.3%	0.3%	0.1%	0.5%
Room for easy maneuvering	0.3%	0.2%	0.3%	0.5%
Transport links for crew to join/depart	0.3%	0.1%	0.1%	0.7%
Able to book a berth in advance	0.3%	0.3%	0.4%	0.1%
Old world charm/ character	0.2%	0.3%	0.1%	0.3%
Friendly locals	0.2%	0.0%	0.1%	0.6%

Continued overleaf

	Overall	First most important	Second most important	Third most important
24 hr port/staff assistance	0.2%	-	0.3%	0.4%
Space for children to play	0.2%	0.2%	0.1%	0.3%
New destinations	0.2%	0.2%	0.3%	0.1%
Spouse/partners/own preference	0.2%	0.1%	0.2%	0.2%
Friends/family	0.2%	0.1%	0.1%	0.4%
Local to good sailing area	0.2%	0.1%	0.4%	0.0%
Base for racing	0.2%	0.0%	0.4%	-
Accommodation	0.2%	0.4%	0.1%	-
No need for rafting	0.1%	0.2%	0.2%	-
Club house/ yacht club bar	0.1%	-	0.1%	0.4%
Child-friendly place/ safe for children	0.1%	0.2%	0.2%	-
Accessible in all weather conditions	0.1%	0.4%	-	-
Parking	0.1%	-	0.3%	0.0%
Decent/cheap food	0.1%	-	0.2%	0.1%
Facilities for families with children	0.1%	0.1%	0.2%	-
Slipway/ launching site	0.1%	0.1%	-	0.2%
Who is on board - age/ability of crew	0.1%	0.0%	0.2%	0.0%
Dog-friendly/ able to cope with pets	0.1%	0.0%	0.1%	0.2%
Weather information available	0.1%	0.1%	-	0.1%
Able to book a berth via VHF radio	0.1%	0.0%	0.1%	0.0%
Ease of approach at night	0.1%	0.0%	-	0.2%

4. OPINIONS ON FACILITIES & SERVICES

For the following section on visitor opinions, the results for all 16 participating harbours and marinas have been aggregated to provide general benchmarks. Each participating harbour and marina were supplied with their own performance results along with the regional averages shown below.

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.

Table 17a: Helpfulness of marina/harbour staff & feeling of safety & security

	Helpfulness of staff		**Feeling of safety & security**	
	All locations		All locations	
Base	1399		1389	
Poor	4	0.3%	25	1.8%
Average	45	3.2%	93	6.7%
Good	459	32.8%	665	47.9%
Excellent	890	63.7%	606	43.6%

Table 17b: Availability of marine & local visitor information

	Marine-related information on site		**Local visitor information**	
	All locations		All locations	
Base	1314		1265	
Poor	17	1.3%	23	1.8%
Average	148	11.3%	252	19.9%
Good	664	50.6%	656	51.9%
Excellent	485	36.9%	334	26.4%

Table 17c: Availability of fresh water & electricity (shore-power)

	Availability of fresh water		**Availability of electricity**	
	All locations		All locations	
Base	1354		1181	
Poor	51	3.7%	52	4.4%
Average	95	7.0%	76	6.4%
Good	536	39.6%	447	37.8%
Excellent	672	49.6%	607	51.4%

Table 17d: Availability of chandlery & specialist services (repairs etc.)

	Availability of chandlery		**Availability of specialist services**	
	All locations		All locations	
Base	1103		722	
Poor	109	9.9%	20	2.8%
Average	244	22.1%	167	23.1%
Good	468	42.4%	335	46.3%
Excellent	282	25.6%	201	27.8%

The areas that received more ‘average’ 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, and 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.

Table 17e: Availability & quality of toilet & shower facilities

	Availability of toilet & shower facilities		**Quality of toilet & shower facilities**	
	All locations		All locations	
Base	1328		1299	
Poor	62	4.7%	114	8.8%
Average	216	16.3%	235	18.1%
Good	607	45.7%	529	40.7%
Excellent	443	33.3%	422	32.5%

Table 17f: Range, quality & value for money of local places to eat & drink ashore

	Range		**Quality**		**Value for money**	
	All locations		All locations		All locations	
Base	1300		1249		1247	
Poor	71	5.5%	56	4.5%	103	8.3%
Average	215	16.5%	273	21.9%	441	35.4%
Good	627	48.2%	647	51.8%	533	42.8%
Excellent	387	29.8%	273	21.9%	170	13.6%

Table 17g: Range, quality & value for money of local shops

	Range		**Quality**		**Value for money**	
	All locations		All locations		All locations	
Base	1282		1245		1205	
Poor	129	10.1%	67	5.4%	70	5.8%
Average	314	24.5%	389	31.2%	508	42.2%
Good	608	47.4%	621	49.9%	499	41.4%
Excellent	232	18.1%	169	13.6%	128	10.6%

Table 17h: Value for money of the mooring fee (relative to other similar locations)

	Value for money					
		All locations		UK visitors		Overseas visitors
Base	1318		1107		212	
Poor	87	6.6%	67	6.1%	20	9.3%
Average	488	37.0%	401	36.2%	87	41.1%
Good	456	34.6%	372	33.6%	85	40.1%
Excellent	287	21.8%	267	24.1%	20	9.5%

5. VISITOR EXPENDITURE[4]

Respondents were asked to provide an estimation of their expenditure on a number of items during their stay at the harbour/marina.

To provide a measure of the expenditure benefiting tourism/leisure related businesses such as pubs as distinct from boat related expenditure such as fuel and chandlers, visiting crew were asked to provide an estimate of expenditure broken down into 6 areas:

Boat-related items
- ⇒ Marina/ancillary charges
- ⇒ Fuel
- ⇒ Boat equipment, chandlery or repairs
- ⇒ Boat provisions (inc. food & drink for journey)

Tourism/leisure related items
- ⇒ Eating out & drinking ashore
- ⇒ Outings, entertainment & other expenditure ashore

Overall average expenditure per visiting party over the duration of the visit was £239.48. Results split by domestic and overseas visiting parties indicate that overseas visitors spent on average around £185.29 per party per visit or %more than domestic visitors (£211.80 for domestic parties and £397.09 for overseas parties).

Table 18a: Average expenditure £ per crew/group per visit – all locations

	Base	Average
Estimated expenditure - marina/ancillary charges	1144	£53.05
Estimated expenditure – fuel	1034	£24.63
Estimated expenditure - boat equipment, chandlery or repairs	1004	£26.32
Estimated expenditure - boat provisions & shopping (inc. food & drink)	1181	£44.44
Estimated expenditure - eating out & drinking ashore	1205	£70.30
Estimated expenditure - outings, entertainment & other expenditure ashore	930	£20.74
Total:		**£239.48**

Table 18b: Average expenditure £ per crew/group per visit – all domestic visiting yachts

	Base	Average
Estimated expenditure - marina/ancillary charges	973	£44.91
Estimated expenditure – fuel	879	£22.96
Estimated expenditure - boat equipment, chandlery or repairs	868	£24.27
Estimated expenditure - boat provisions & shopping (inc. food & drink)	998	£34.99
Estimated expenditure - eating out & drinking ashore	1024	£67.07
Estimated expenditure - outings, entertainment & other expenditure ashore	793	£17.60
Total:		**£211.80**

Of the £211.80 spent on items ashore, approximately £127.13 (or 60%) went towards the cost of boat related items such as berthing charges as the purchase of fuel, and £84.67 (or 40%) went towards the cost of eating and drinking, outings such as visits to places of interest/visits to attractions, entertainment and other non-marine expenditure ashore such as purchase of stamps, top-up phone cards, clothes, souvenirs and so forth.

[4] All average expenditure figures include those who stated that they spent 'nothing' (zero) on any category of expenditure, but exclude 'don't knows' and 'no replies'.

Table 18c: Average expenditure £ per crew/group per visit – all overseas visiting yachts		
	Base	Average
Estimated expenditure - marina/ancillary charges	171	£99.59
Estimated expenditure – fuel	155	£34.08
Estimated expenditure - boat equipment, chandlery or repairs	136	£39.43
Estimated expenditure - boat provisions & shopping (inc. food & drink)	182	£96.23
Estimated expenditure - eating out & drinking ashore	181	£88.78
Estimated expenditure - outings, entertainment & other expenditure ashore	136	£38.98
Total:		**£397.09**

Of the £397 spent on items ashore, approximately £269.33 (or 68%) went towards the cost of boat related items such as berthing charges as the purchase of fuel, and £127.76 (or 32%) went towards the cost of eating and drinking, outings such as visits to places of interest/visits to attractions, entertainment and other non-marine expenditure ashore such as purchase of stamps, top-up phone cards, clothes, souvenirs and so forth.

To obtain daily expenditure figures, the results were split by the average number of nights spent at the marina/harbour.

Table 19a: Average expenditure £ per crew/group per day[5] - all locations		
	Base	Average
Estimated expenditure - marina/ancillary charges	1133	£25.44
Estimated expenditure – fuel	1020	£11.82
Estimated expenditure - boat equipment, chandlery or repairs	990	£12.41
Estimated expenditure - boat provisions & shopping (inc. food & drink)	1166	£20.52
Estimated expenditure - eating out & drinking ashore	1190	£33.90
Estimated expenditure - outings, entertainment & other expenditure ashore	917	£9.78
Total:		**£113.95**

Table 19b: Average expenditure £ per crew/group per day - all domestic visiting yachts		
	Base	Average
Estimated expenditure - marina/ancillary charges	964	£22.10
Estimated expenditure – fuel	867	£11.23
Estimated expenditure - boat equipment, chandlery or repairs	856	£11.57
Estimated expenditure - boat provisions & shopping (inc. food & drink)	985	£16.68
Estimated expenditure - eating out & drinking ashore	1011	£33.04
Estimated expenditure - outings, entertainment & other expenditure ashore	783	£8.41
Total:		**£103.03**

Table 19c: Average expenditure £ per crew/group per day - all overseas visiting yachts		
	Base	Average
Estimated expenditure - marina/ancillary charges	169	£43.03
Estimated expenditure – fuel	153	£14.94
Estimated expenditure - boat equipment, chandlery or repairs	134	£18.11
Estimated expenditure - boat provisions & shopping (inc. food & drink)	180	£39.62
Estimated expenditure - eating out & drinking ashore	179	£38.25
Estimated expenditure - outings, entertainment & other expenditure ashore	134	£17.09
Total:		**£171.04**

An average each domestic visiting party spent around £103 a night, whereas each overseas visiting party spent around £171 per night.

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[5] Average expenditure divided by length of stay in nights (where stated)

6. VOLUME AND VALUE OF YACHTING TOURISM

The primary data source for estimating overall volume are records obtained from marina managers and harbour authorities of the number of overnight and day visiting boats, and where possible an estimation of the percentage split between UK and overseas visiting boats. **The figures exclude berth nights during premier sailing events such as Cowes Week.**

An initial audit identified 99 berthing providers across the South East Region. Of these, 50 supplied visitor data broken down by month for the year 2003. The collection of data varied considerably between individual marinas/harbours. Some kept very detailed records, whilst others were only able to provide estimates or approximations. To the best of our knowledge we understand that many of the providers that were unable to supply data were mainly residential berth providers, or were relatively small and/or did not keep records[6].

Data on average crew size and average spend per crew member per day from the survey was used to approximate overall value and economic impact of yachting tourism to the regional economy. As the questionnaire survey only obtained data from overnight visiting boat crew, the value of the leisure day yachting visitor market has been estimated by applying a ‘proxy’ spend figure drawn from an earlier survey of visiting yachtsmen in Cowes[7]. The survey undertaken in 2000 found that on average each visiting party spent around £66 per visit. The largest proportion of this spend went towards the cost of food and beverages (see Table 22 below).

Table 21: Estimated overall expenditure by short-stay/day visiting crew

Mooring fees	£6.71
Marine goods/services	£6.85
Eating & drinking	£29.50
Shopping	£14.45
Other	£8.49
Total:	£66.01

It is important to note that in view of the gaps in data, the overall estimates we arrived at are likely to be an underestimation.

Drawing on data provided by marinas and harbours, it is estimated that some 187,518 berth nights were spent in the region. The domestic market accounted for 89% of all berth nights (166,805 visitor berth nights compared to 20,713 overseas visitor berth nights).

The monthly breakdowns indicate that the sector is 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 arrived over August.

[6] This is based on telephone calls made to all sailing ports that did not return berth night data.
[7] Cowes Visiting Yachtsmen Survey (2000). Southern Tourist Board Report.

Table 22: Estimated visitor berth nights by month			
Month	Number of domestic visitors berth nights	Number of overseas visitor berth nights	Total visitor berth nights
January	3,269	10	3,279
February	3,731	30	3,761
March	6,188	265	6,453
April	12,151	859	13,010
May	17,420	2,511	19,931
June	21,411	3,115	24,526
July	29,946	4,916	34,862
August	37,229	6,263	43,492
September	16,321	2,121	18,442
October	9,546	471	10,017
November	5,587	137	5,724
December	4,005	16	4,021
Total	166,805	20,713	187,518

Relatively more overseas boats arrived over July and August compared to other months of the year (around 14% of all visiting boats over these two months are estimated to be boats sailing from overseas).

Figure 4: Seasonality in visiting yacht nights

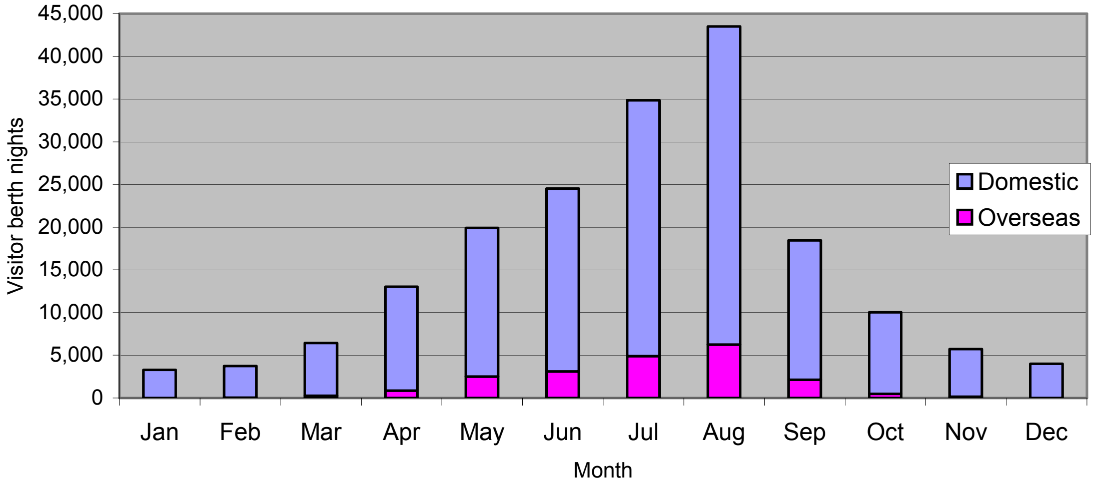


Table 23: Estimated number of actual overnight visitors			
Month	Estimated number of overseas crew (berth nights * 3.04)	Estimated number of domestic crew (berth nights * 3.07)	Total estimated visitors (all crew)
January	31	10,036	10,066
February	92	11,454	11,546
March	808	18,997	19,805
April	2,620	37,307	39,927
May	7,659	53,479	61,138
June	9,501	65,732	75,233
July	14,994	91,934	106,928
August	19,102	114,293	133,395
September	6,469	50,105	56,575
October	1,437	29,306	30,743
November	418	17,152	17,570
December	49	12,295	12,344
Total	63,178	512,091	575,269

Estimation of the actual number of visitors, that is the total sum of all crew, is based on multiplying berth nights by average crew size. This survey found that the average crew size for domestic visitors was 3.07 and average crew size for overseas visitors was roughly 3.05 people. Based in this estimation, nearly 600,000 visiting crew members stayed overnight at coastal marinas and harbours in the South East Region in 2003.

A small but significant number of berth nights are also spent each year at anchor. As these are not recorded, there is no available data apart from the findings of this survey to provide a baseline for quantification. The survey found that on average 6 nights per year was spent at anchor; some 15% of all berth nights (see Table 14). On this estimation, a further 28,127 berth nights and roughly 84,383 visiting crew members (based on multiplying berth nights by average crew size of 3[8]) need to be accounted for in the total volume figures. Boats at anchor will however have a negligible economic impact.

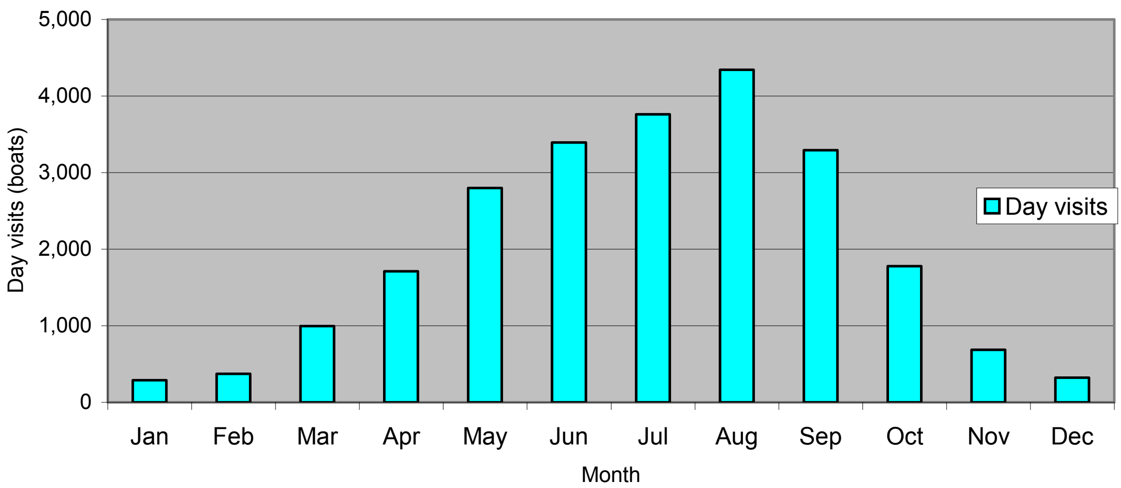
It is estimated that a further 23,744 boats visited for the day or a short-stay of a few hours (see table 25). As with overnight visitors, the leisure day market is highly seasonal, with most boats arriving between April to October, with August once again being the busiest month. Multiplying the figure with an average crew size of 3.05[9] provides a volume figure of nearly 72,500 day visitors.

[8] We have rounded crew size in this instance as origin of crew is unknown.
[9] To estimate average crew size for short-stay/day visiting boats we have applied the average group size of overnight domestic crew visits.

Table 24: Estimated number of day visitors

Month	Estimated number of visiting day boats	Estimated number of day visitors (all crew)
January	290	885
February	373	1,138
March	994	3,032
April	1,713	5,225
May	2,798	8,534
June	3,393	10,349
July	3,761	11,471
August	4,344	13,249
September	3,291	10,038
October	1,778	5,423
November	685	2,089
December	324	988
Total	23,744	72,419

Figure 5: Seasonality in day visits



Applying spend per visiting party per berth night/per day visit that has been drawn from this survey and the 2000 Cowes Yachting Survey, it is estimated that overseas staying visitors spent around £3.5 million at marinas and harbours in the region, domestic staying visitors spent £17.1 million, and day visitors spent around £1.5 million. In total some £22.2 million was spent by visiting cruising crew on goods and services at marinas, yacht harbours and the wider town quay in 2003.

With an economic multiplier of 1.3[10] this translates into an nearly £30 million in total.

[10] This is drawn from the *Scottish Tourism Multiplier Study* carried out in 1992. The multiplier 1.3 (i.e. every £1 spend generates a further 30p spend) is widely used to measure the impact of additional tourism expenditure introduced into the economy from an initial level of tourism expenditure.

Table 25: Estimated visitor expenditure – Direct expenditure				
Month	Total estimated overseas visitor spend	Total estimated domestic visitor spend	Total estimated day/short stay spend	All visiting cruising boat spend
January	£1,710	£336,805	£19,143	£357,658
February	£5,131	£384,405	£ 24,622	£414,158
March	£45,326	£ 637,550	£ 65,614	£748,490
April	£146,923	£1,252,021	£113,075	£1,512,019
May	£429,481	£1,794,783	£184,696	£2,408,960
June	£532,790	£2,205,975	£223,972	£2,962,737
July	£840,833	£3,085,336	£248,264	£4,174,433
August	£1,071,224	£3,835,704	£286,747	£5,193,675
September	£362,776	£1,681,553	£ 217,239	£2,261,568
October	£80,560	£983,524	£117,366	£1,181,450
November	£23,432	£ 575,629	£45,217	£644,278
December	£2,737	£412,635	£21,387	£436,759
Total	£3,542,923	£17,185,919	£1,567,341	£22,296,183.00

Table 26: Estimated value of yachting tourism and leisure day market with multiplier	
Total domestic staying visitor value	£22,341,695
Total overseas staying visitor value	£4,605,800
Total day market value	£2,037,543
Total value	£28,985,038

By averaging the proportion of the above expenditure on boat-related items (i.e. berthing fees, chandlers and purchase of food and drink for the journey) and that spent on leisure items ashore such as eating and drinking and on outings overnight and day visiting boats, it is estimated that approximately £11.8 million (or 41%) of the total expenditure benefits tourism/leisure related businesses ashore.

To establish the numbers of FTE jobs supported by visitor expenditure, the following turnover per job figures[11] have been use:

Domestic visitor expenditure required to support each FTE job	£40,000
Overseas visitor expenditure required to support each FTE job	£41,700
Day visitor expenditure required to support each FTE job	£39,200

Drawing on the above figures, it is estimated that domestic visitor expenditure supports 559 FTE jobs, overseas visitor expenditure supports 110 FTE jobs, and day visitor expenditure supports 52 FTE jobs.

In total, yachting tourism expenditure supports an estimated 721 FTE jobs.

[11] The turnover per job figures have been drawn the study *Employment generated by tourism* in Britain (2003), VisitBritain, London.

7. SUMMARY OF FINDINGS

Drawing on the available data, it is estimated that some 671,000 yachtspersons visited marina's 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.

Yachting tourism in the South East has a strong appeal for older families and couples, but has broad appeal across the age groups. Visitors tend to sail using their own boats and spend a large part of their leisure time on the water, using their boats over 77 days a year on average, and taking an average of 17 cruising trips per year.

Cruising trips within the region tend to be relatively short, approximately 2 to 3 nights in length, reflecting wider national trends towards short breaks.

Visiting yachtspersons are in general high spenders. On average, each visiting crew party spends around £239 during their stay. Overseas crew members spend somewhat more than their British counterparts.

The three main areas that generate the greatest spend are eating out and drinking ashore, marina/ancillary charges, and shopping (on boat provisions and food and drink). Expenditure on entertainment tends to be far lower. This may be a reflection of the tendency of yachtsmen to be highly independent and self-sufficient, viewing the sailing as the core activity – i.e. sailing is the entertainment.

The market is predominately a home market; some 83% of visiting boats contained UK residents. The main catchment area appears to be the South East itself, with Hampshire a prime residential location. This may be a reflection of the preference of visitors to choose sailing destinations that are within a comfortable, leisurely cruising distance from home ports and choose a cruising area that offers the opportunity to take a number of shorter hops or be within easy distance of shelter from adverse weather as a result of having a number of marinas and harbours within close proximity to one another.

Around three-quarters of domestic visitors had sailed to that marina/harbour before. This is also indicative of the attractiveness of the region for leisure day sailing. According to records supplied by marina and harbour staff, some 11% of visiting boats are day visitors. However, the percentage is likely to be considerably higher as many berthing providers do not record day visitors.

Overseas visitors accounted for between less than 1% of berth nights during the off-peak season to 14% berth nights during the peak season. The percentage of overseas visitors represented in the survey was 17% of the total sample. The majority of overseas yachtspersons to this region come from Europe, in the main from the Netherlands.

Facilities such as good quality showers, toilets and laundry facilities have a critical bearing on visitors' destination choices. Other highly important on-shore facilities include boatyard services, fuelling, chandlery, shops and restaurants.

The survey found that although visitor satisfaction was generally high, the range and quality of facilities such as chandlery and toilets/showers received relatively higher 'average' or 'poor' scores compared to other areas.

For many visitors high prices are a discouraging factor, particularly for overseas visitors. Comments from the questionnaires reflect the fact that the UK in general is perceived to be relatively expensive in terms of mooring costs and fuel compared with the continent.

8. DRAFT STUDY OUTPUTS AND ACTION PLAN

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.

8.1 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. Feedback from participants indicate that survey results are having a beneficial impact:

On service and product improvements/developments,

“The findings have led us to increase the regularity of the cleaning of the lavatory block. We have for some years been considering some major improvements and this survey has further heightened our awareness that the work should be carried out sooner rather than later” (harbourmaster).

“The section on visitor expenditure has made us look more closely at what we are providing as it would seem that our visitor spend is well below other marinas” (marina manager).

And future marketing,

"…majority of our visitors are coming from the West. The survey has alerted us to the need to encourage more visiting crew from the West" *(marina manager).*

The survey found that the availability of wide ranging and high quality facilities are often more important than the location itself. The lack of provision of quality on-shore facilities may well mean that the region loses visitors from home and overseas to neighbouring sailing destinations in the South West as well as across the Channel.

8.1.1 Draft Actions

- Marinas and yacht harbours to be encouraged to monitor performance through visitor surveys on a regular basis.

- TSE to work with key agencies, i.e. RYA, BMF, SEEDA, to encourage and guide improvements to berthing and supporting facilities that will further enhance visitor experience and encourage increased visitation.

8.2 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. Mintel and RYA 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.

8.2.1 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.

8.3 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 quay.

8.3.1 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.
- TSE to encourage more visiting crew expenditure in visiting towns by actions listed in 8.2.1

8.4 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.

8.4.1 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.

8.5 Marine Working Task Force Group

Following a workshop in October 2004 to discuss the draft action plans, a small working group was set up to focus in more detail four areas of action:

- Promotion of the South East region as a centre for cruise yachting
- Improving services for visiting yachtspersons
- Training for packages for marina operators specially designed to welcome visiting yachtspersons and cater to their needs
- Re-examine opportunities for increasing the number of visitors moorings/marina development

APPENDIX 1: SURVEY QUESTIONNAIRE & VISITOR NIGHT DATA FORM

Ref:

VISITING BOATS SURVEY

PLEASE TAKE PART IN OUR SURVEY & EARN A £5 DISCOUNT OFF YOUR OVERNIGHT MOORING FEE

Dear Visitor,
We would be very grateful if you could spare a few minutes to complete this short questionnaire about your leisure cruising activities in general and your visit to this marina or harbour today. Your answers will help us make improvements for future visits. Please indicate your chosen answer by ticking the appropriate box or writing in the space provided. We ask that only one questionnaire is completed per boat, and that the questionnaire is completed by the boat owner or skipper.
As a Thank You for taking the time to complete the questionnaire, you may claim a £5 discount on your berthing fee for this visit. Please hand the completed questionnaire in to the marina office (or to the harbourmaster) to claim your discount.

THANK YOU FOR YOUR TIME – WE HOPE YOU HAVE ENJOYED YOUR VISIT.

Today's Date ☐

Location ☐

ABOUT YOUR BOAT & CREW:

Q1 What is the home port of the yacht/boat?

☐

Q2 Where do you live (owner/skipper)?

Home town ☐

County/Country ☐

Q3 Is the boat:

Privately owned ❑1
Chartered ❑2
Sailing school ❑3
Corporate owned ❑4

Q4 Type of boat:

Motor boat ❑1 Sailing yacht ❑2

Q5 Size (LOA) of boat: ☐ Feet/metres

Q6 Is this your first visit to this location?

YES ❑1 NO ❑2

Q7 How would you describe the composition of your crew/group:

Individual(s) ❑1 Family &/or friends ❑3
Couple ❑2 Other ❑4

Q8 Please indicate how many people within your group fall into each of the following age categories:

0-15 yrs	☐	45-54 yrs	☐
16-24 yrs	☐	55-64 yrs	☐
25-34 yrs	☐	65+ yrs	☐
35-44 yrs	☐		

Total people onboard: ☐

ABOUT YOUR GENERAL CRUISING ACTIVITIES:

Q9 Approximately how many days per year do you use your boat?

☐ days

Q10 Approximately how many cruising trips *(days, weekends or longer trips)* do you make each year?

☐ trips

Q11 Approximately how many nights per year do you spend on your boat away from the home berth as a visitor in any marina, harbour or anchorage:

a) in the UK ☐ nights
b) overseas ☐ nights

Q12 Which three ports, harbours or marinas have you visited most frequently over the last year?

i) ☐
ii) ☐
iii) ☐

Q13 Approximately how many nights per year do you spend <u>as a visitor</u> (i.e. away from your home berth):

a) in a marina ☐ nights
(with pontoon or direct shore access)

b) on a pile or swinging mooring ☐ nights

c) at anchor ☐ nights

Q14 Apart from tidal or weather considerations, what factors are <u>most important</u> to you when deciding on a marina or harbour to visit?

i) ☐
ii) ☐
iii) ☐

Q15 Please state three (UK) marinas, ports or harbours preferred in terms of:

a) Ambience	i)	ii)	iii)
b) Quality of service	i)	ii)	iii)
c) Value for money	i)	ii)	iii)

ABOUT YOUR VISIT TO THIS LOCATION:

Q16 How many nights are you staying at this location? ☐ nights

Q17 Based on THIS VISIT to this harbour/marina, please could you give your opinion on the following?
(PLEASE TICK ONE BOX IN EACH ROW)

	Excellent	Good	Average	Poor	Not Applicable/ Can't Say
Helpfulness of marina/harbour staff	❑4	❑3	❑2	❑1	❑0
Feeling of safety & security	❑4	❑3	❑2	❑1	❑0
Availability of marine-related information on site *(tides/weather/safety/local navigation)*	❑4	❑3	❑2	❑1	❑0
Availability of local visitor information *(places of interest to visit, things to see and do)*	❑4	❑3	❑2	❑1	❑0
Availability of marine facilities and services					
- fresh water	❑4	❑3	❑2	❑1	❑0
- electricity	❑4	❑3	❑2	❑1	❑0
- chandlery	❑4	❑3	❑2	❑1	❑0
- specialist services (repairs etc.)	❑4	❑3	❑2	❑1	❑0
Toilets & shower facilities					
- availability (adequate in number)	❑4	❑3	❑2	❑1	❑0
- quality	❑4	❑3	❑2	❑1	❑0
Local places to eat and drink ashore					
- range	❑4	❑3	❑2	❑1	❑0
- quality	❑4	❑3	❑2	❑1	❑0
- value for money	❑4	❑3	❑2	❑1	❑0
Local shops					
- range	❑4	❑3	❑2	❑1	❑0
- quality	❑4	❑3	❑2	❑1	❑0
- value for money	❑4	❑3	❑2	❑1	❑0
Value for money of the berthing fee *(relative to other similar locations)*	❑4	❑3	❑2	❑1	❑0

One of the objectives of the survey is to establish the magnitude and importance of cruising visitor spend to the local economy across the South East Region. It would therefore be most helpful if you could assist us by giving some details of your spending in relation to THIS VISIT. Please include expenditure by all members of your group/crew where known.

Q18 Please can you provide an estimation of expenditure during the whole of THIS VISIT on the following:

a) marina & ancillary charges £ …………………… ❑ Not known
b) fuel £ …………………… ❑Not known
c) boat equipment, chandlery or repairs £ …………………… ❑Not known
d) boat provisions & shopping (inc. food & drink) £ …………………… ❑ Not known
e) eating out & drinking ashore £ …………………… ❑ Not known
f) outings, entertainment & any other expenditure ashore £ …………………… ❑ Not known

Please tick box if expenditure for any category is not known

How many people does this expenditure cover? ☐ people

THANK YOU FOR YOUR TIME
Your contribution to this study is very valuable & all the information provided on this questionnaire will be treated as confidential.
Please return the completed questionnaire to the marina office/harbourmaster to claim the £5 discount off your berthing fee.

Location: ………………………..

South East Region Leisure Yachting Survey 2003/4

2003	Total 'visitor nights'[12]	Total day or short-stay visitors	% UK visiting boats[13]	% overseas visiting boats
JANUARY				
FEBRUARY				
MARCH				
APRIL				
MAY				
JUNE				
JULY				
AUGUST				
SEPTEMBER				
OCTOBER				
NOVEMBER				
DECEMBER				
Total:				

[12] *'Visitor nights' by month, where 1 visitor night = 1 boat (& crew) staying overnight for 1 night. A boat staying for 3 nights would be counted as 3 visitor nights.*

If you do not keep exact records of the number of visiting boats staying overnight each night in your harbour/marina, we would be grateful if you were able to provide an estimate, even if fairly approximate, since this can be used as a basis for measuring the seasonality of demand for visitor berths.

[13] *Please provide an estimate of the % split between UK and overseas visiting boats if at all possible*

APPENDIX 2: LIST OF MARINAS & HARBOURS PROVIDING INFORMATION ON VISITING BOATS

Marinas & harbours providing data on visiting yachts

(Survey participants in **bold**, those providing information on visiting boat nights in normal font, those for whom we have no visiting boat data are shown in *italics*).

Weymouth to Poole Harbour	Weymouth Harbour
	Weymouth Marina
Poole Harbour to Christchurch	*Ridge Wharf Yachting Centre, Wareham*
	Poole Dolphin Haven
	Salterns Marina, Poole
	Cobbs Quay Marina, Poole
	CJ Evans International
	Davis's Boatyard
	Mitchell's Yacht Haven
	Quay West Marina
Christchurch to Southampton	Christchurch Harbour
	Christchurch Marine Ltd.
	Keyhaven River
	Lymington Yacht Haven
	Lymington (Berthon) Marina
	Lymington Harbour
	Beaulieu River & Bucklers Hard
	Hythe Marina
Southampton to River Hamble	Southampton Town Quay
	Ocean Village Marina, Southampton
	Kemps Quay, Southampton
	Saxon Wharf, Southampton
	Shamrock Quay, Southampton
River Hamble to Portsmouth Harbour	**Hamble Point Marina, Hamble**
	Port Hamble Marina, Hamble
	Hamble Yacht Services
	Mercury Yacht Harbour, Hamble
	Deacons Boatyard, Bursledon
	RK Marine
	Moodys Marina, Swanwick
	Universal Marina, Sarisbury
	Stone Pier Yard, Warsash
	River Hamble Harbour Authority
Isle of Wight	**Yarmouth Harbour Commissioners, IoW**
	Cowes Yacht Haven, IoW
	Cowes Harbour Commission, IoW
	East Cowes Marina, IoW
	The Folly Inn, IoW
	Island Harbour, IoW
	Newport Harbour, IoW
	UKSA, Cowes
	Fishbourne Quay, IoW
	Ryde Harbour, IoW
	Bembridge Harbour, IoW
Portsmouth Harbour to Bognor Regis	**Haslar Marina, Gosport**
	Gosport Marina (Camper & Nicholsons)
	Gosport Mooring Centre
	Fareham Marine
	Fareham Yacht Harbour
	Wicormarine, Portchester
	Port Solent Marina
	Gunwharf Quays, Portsmouth

	Southsea Marina
	Langstone Harbour Board
Portsmouth Harbour to Bognor Regis Cont.d.	Sparkes Yacht Harbour, Hayling Island
	The Hayling Yacht Co Ltd
	Northney Marina, Hayling Island
	Emsworth Yacht Harbour
	Tarquin Yacht Harbour, Emsworth
	Thornham Marina, Emsworth
	Bosham Quay, Chichester Harbour
	Chichester Marina
	Chichester Harbour Conservancy
	Birdham Pool Marina, Chichester
Bognor Regis to Eastbourne	*Littlehampton Marina Ltd, Littlehampton*
	Arun Yacht Club, Littlehampton
	Lady Bee Marina, Southwick
	Riverside Marine, Shoreham
	Sussex Yacht Club, Shoreham-by-Sea
	Brighton Marina
	Newhaven Marina Ltd.
	Meeching Boats, Newhaven
	Peter Leonard Marine, Newhaven
	Cantell & Sons Ltd, Newhaven
Eastbourne to Ramsgate	**Sovereign Harbour Marina Ltd, Eastbourne**
	Rye Harbour
	HJ Phillips Boatbuilders, Rye
	Rye Yacht Marina
	Folkestone Harbour
	Dover Harbour
Ramsgate to Greater London	**Ramsgate Royal Harbour**
	Ethel Alice Hollowshore Services, Faversham
	Youngboats, Faversham
	Iron Wharf Boatyard, Faversham
	Swale Marina, Sittingbourne
	Conyer Creek Marina, Sittingbourne
	Conyer Marina, Sittingbourne
	Queenborough Harbour
	Medway Pier Marina, Gillingham
	Gillingham Marina
	Chatham Maritime Marina, Chatham
	Hoo Marina, Nr Rochester
	Medway Bridge, Rochester
	Cuxton Marina, Rochester
	Gravesham Marina, Gravesend
	Gallions Point Marina, Woolwich
	St Katherines Haven, London
	South Dock Marina, Greenwich
	Limehouse Basin, Docklands, London