

# Background and methods

- **Background:** 3 main areas for focus identified by British Waterways - awareness, demand and customer satisfaction.
- **Objective:** to undertake research into the demand and usage of the canal network in Scotland amongst various user groups in different geographical regions.

## Methods:

- Omnibus surveys regarding awareness and usage of canals amongst general population (2,010 respondents)
- Survey of Long Term Moorers (110 respondents)
- Survey of Transit Users (603 respondents)
- Survey of European boaters (1,505 respondents across 9 countries - UK, France, Germany, Netherlands, Belgium, Norway, Denmark, Sweden, Ireland)



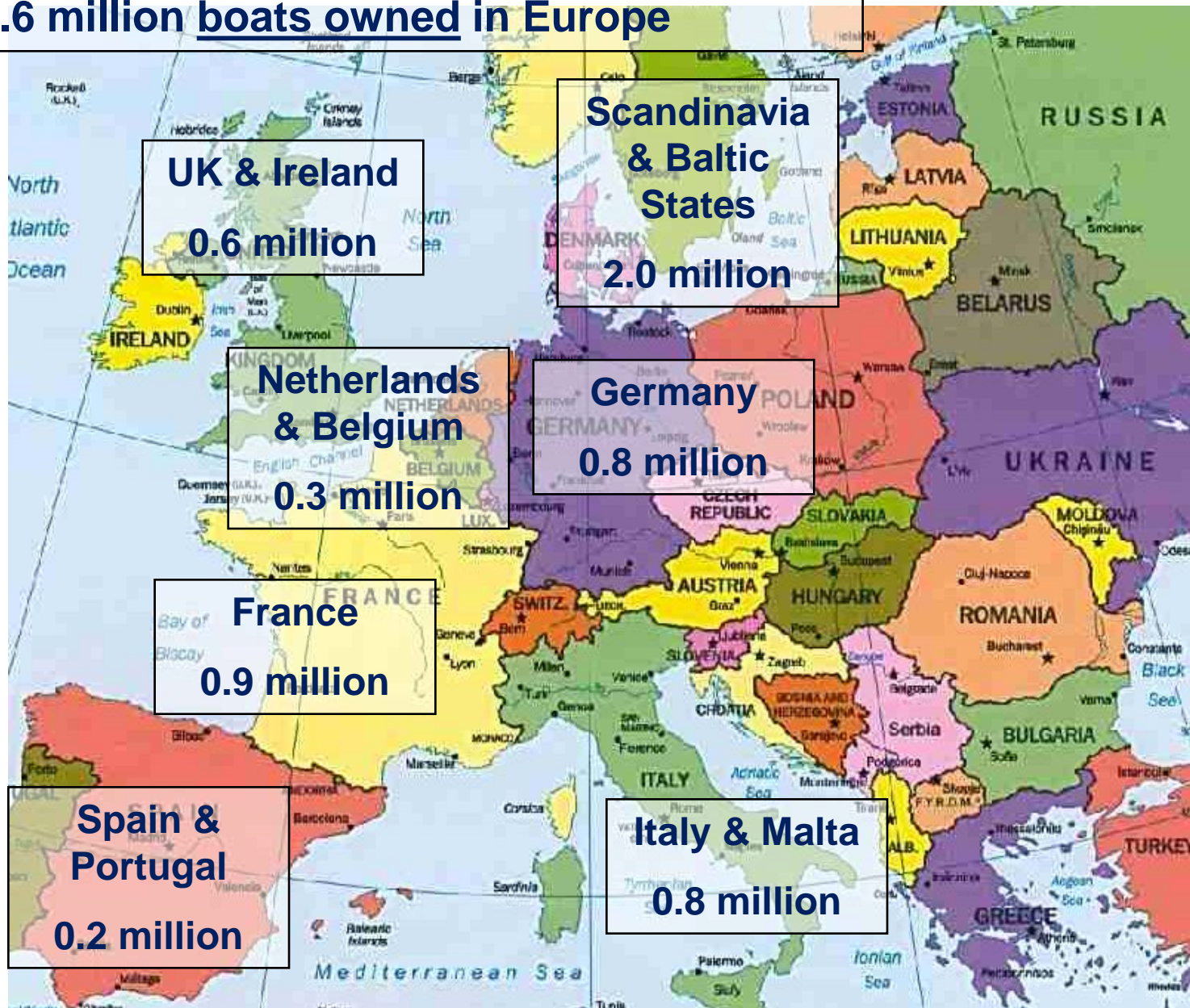
British  
Waterways  
Scotland

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# Recreational boating in Europe

**5.6 million boats owned in Europe**





# In the UK

**3.8 million boating participants (8% of population)**  
(including small boats & personal water craft)

**0.7m motor  
boating/cruising**

**UK or overseas**

**Av. 4- 5 times a year  
often much more**

**0.5m canal boating**

**UK**

**Av. 1 or 2 times a year**

**0.4m yacht cruising**

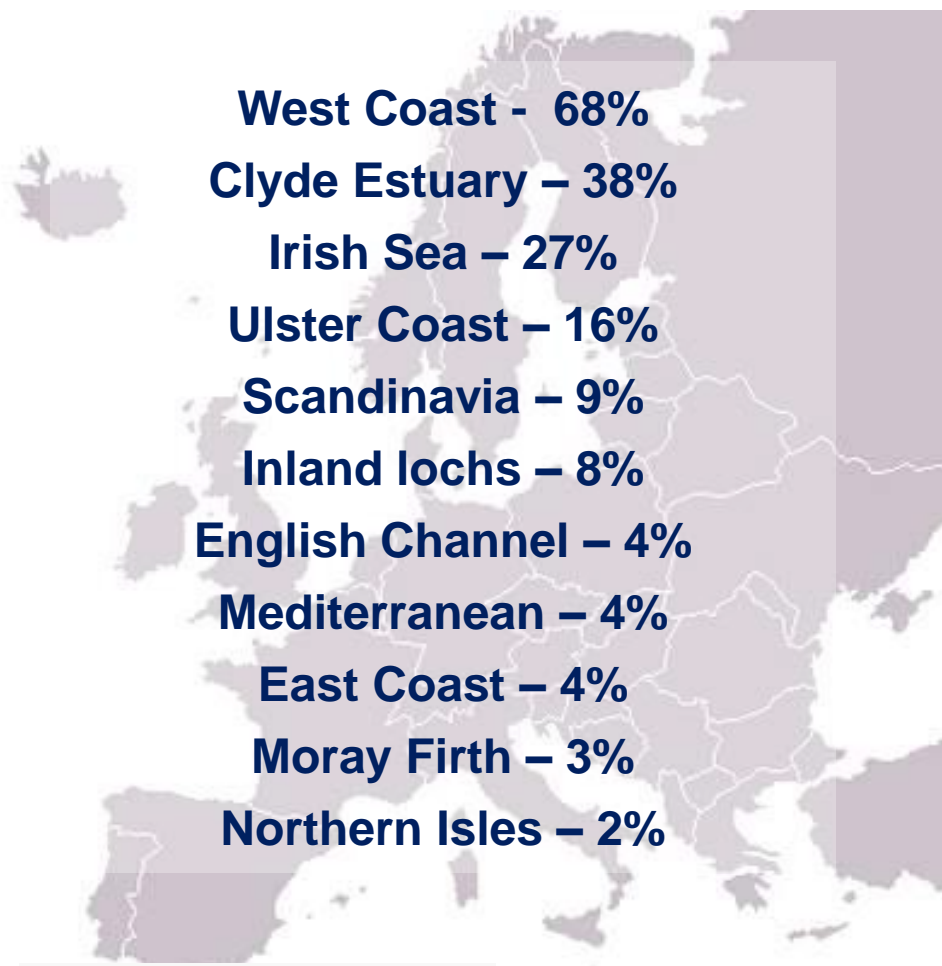
**UK**

**Av. 6 times a year often  
much more**

**22% of boating undertaken by boat owners – 78% by others**  
(holiday hire, friends boats, etc.)

# Transit Users: Boating in the last year

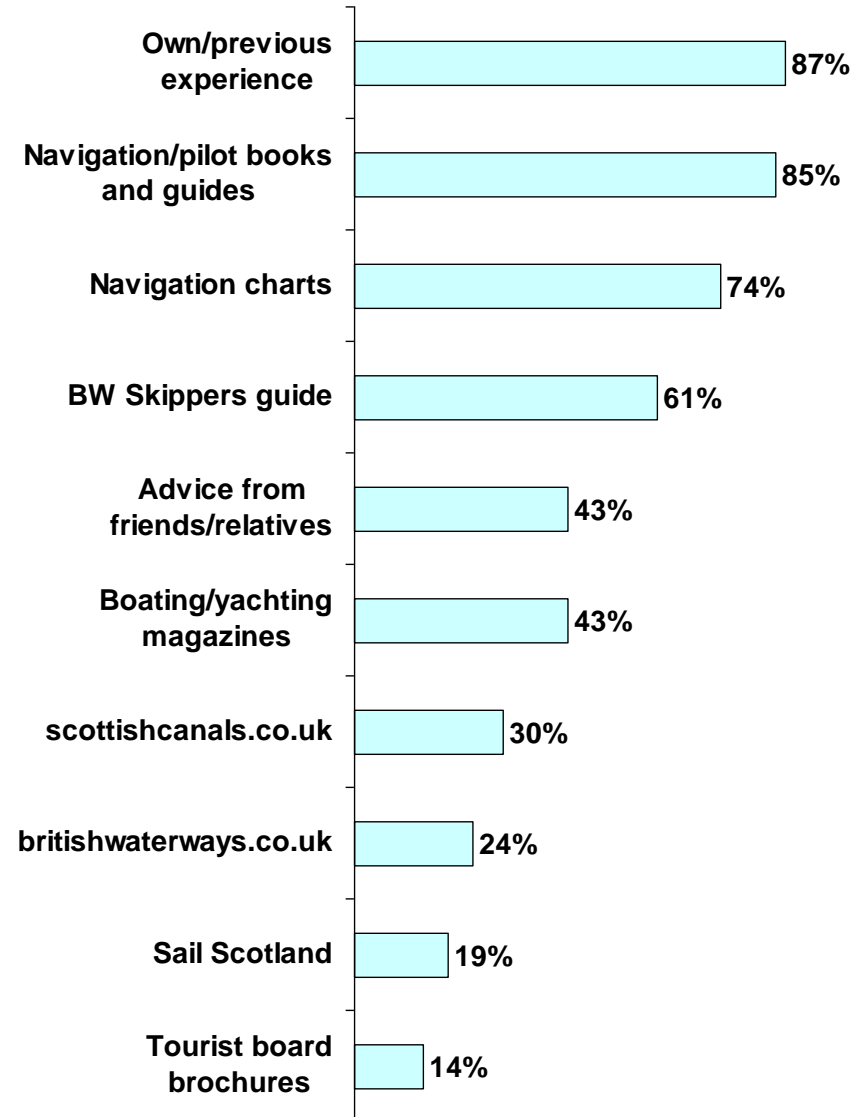
## Places visited



A map of Scotland with various regions highlighted in shades of purple and blue to indicate boating hotspots. The highlighted areas include the West Coast, Clyde Estuary, Irish Sea, Ulster Coast, Scandinavia, Inland lochs, English Channel, Mediterranean, East Coast, Moray Firth, and Northern Isles.

**West Coast - 68%**  
**Clyde Estuary – 38%**  
**Irish Sea – 27%**  
**Ulster Coast – 16%**  
**Scandinavia – 9%**  
**Inland lochs – 8%**  
**English Channel – 4%**  
**Mediterranean – 4%**  
**East Coast – 4%**  
**Moray Firth – 3%**  
**Northern Isles – 2%**

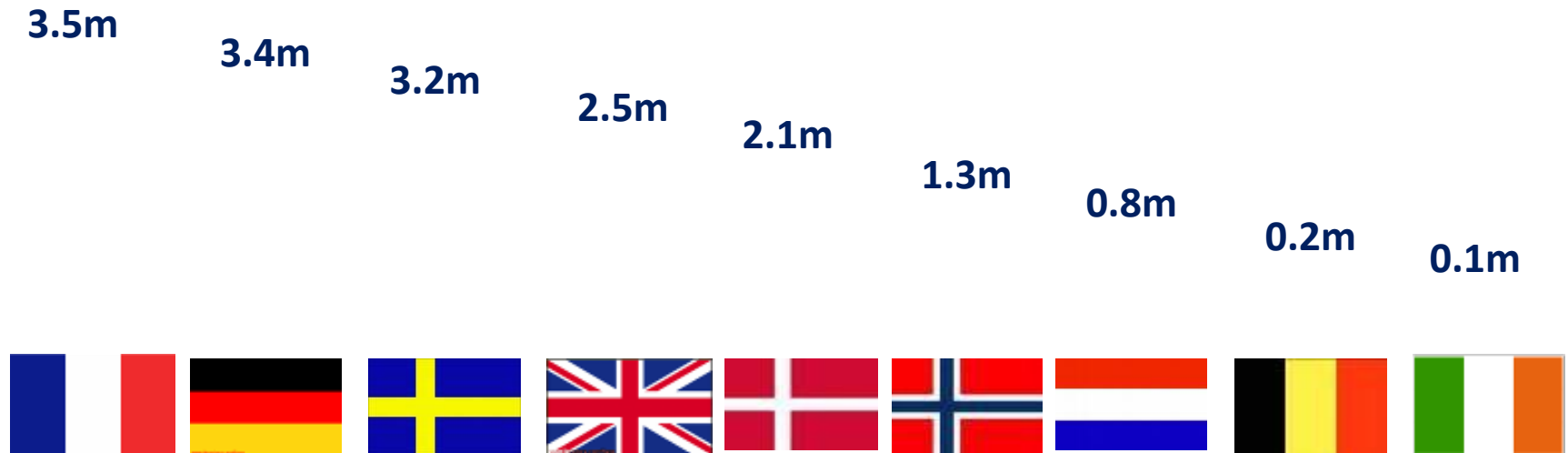
## Sources used for planning



# Boating demand: European boating participation

Of the total 17m participants in the 9 countries:

- 24% Own a boat
- 30% Don't own but have regular access to a boat



# Boating demand: Potential hire market

**17m boating participants**

**4.5m regularly hire  
a boat for a holiday**

**1m very interested in boating in Scotland**

## **More likely than other boaters to:**

- Live in the UK, Belgium, Ireland, Germany or France
  - Previously hired motor cruisers or yachts
- Interested in sailing on inland lakes or lochs, the open sea, island hopping and/or sea estuaries.
- Demographics - Empty Nester and family lifestages, fairly affluent
  - 17% visited Scotland in last 12 months

## **May be influenced to visit by:**

- More information on boating on sea and inland
  - Short break packages, special offers
- On shore 'tourist' facilities (e.g. attractions, eating out), surroundings, uniqueness, interest value.
  - Emphasis of ease of accessibility

# Boating demand: Target market for 'private' boaters

**17m boating participants**

**9.7m access to a boat**

**6.3m sailed on sea**

**0.6m capable of sailing to Scotland**

## **More likely than other boaters to:**

- Live in the UK, Denmark, Sweden, France, Germany
  - Own a yacht
- Sail in sea estuaries, open sea and canals for transit purposes
- Demographics - male, older age groups/Empty Nester, affluent
  - 17% visited Scotland in last 12 months
  - 33% very interested in visiting in future

## **May be influenced to visit by:**

- More information on opportunities for sailing on the sea
- Better provision/promotion of on-shore boating facilities and yacht hire
  - Emphasis of ease of accessibility and potential for short breaks
  - Scotland's USPs - surroundings, islands, interest value.



# Influences on tourism and recreation demand



Sources: Supply of places for outdoor recreation, Henley Centre 2005/ What is the future of domestic tourism to 2015?, VisitBritain 2005.

# Benchmarking & cross promotion

- Simple benchmarking – web statistics and visitor profiles
- Audit of existing practices – Who's already doing what?
- Creation of vehicle for cross promoting European Waterways
- Link building campaign
- Maximising social networks
- Measurement – what difference can we make?

# Scottish canals

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Our canals : Caledonian Canal : Boating

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Caledonian Canal

## Boating on the Caledonian Canal

Explore the Caledonian Canal by boat. Bring your own boat, hire a cruiser or charter a yacht for a canal holiday, take a day-trip on Loch Ness, or stay on a hotel boat or holiday barge. Take in the spectacular

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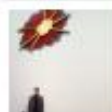
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