**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)
Recreational boating in Europe

5.6 million boats owned in Europe

Scandinavia & Baltic States
2.0 million

UK & Ireland
0.6 million

Netherlands & Belgium
0.3 million

France
0.9 million

Spain & Portugal
0.2 million

Italy & Malta
0.8 million

Source: BMF 2004
In the UK

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

- 0.7m motor boating/cruising
- 0.5m canal boating
- 0.4m yacht cruising

UK or overseas
Av. 4-5 times a year
often much more

UK
Av. 1 or 2 times a year

UK
Av. 6 times a year often much more

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

Source: Watersports and Leisure Participation Survey 2006, Arkenford for BMF, MCA, RNLI and RYA
## Transit Users: Boating in the last year

**Places visited**

- **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**

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own/previous experience</td>
<td>87%</td>
</tr>
<tr>
<td>Navigation/pilot books and guides</td>
<td>85%</td>
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<tr>
<td>Navigation charts</td>
<td>74%</td>
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<tr>
<td>BW Skippers guide</td>
<td>61%</td>
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<tr>
<td>Advice from friends/relatives</td>
<td>43%</td>
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<tr>
<td>Boating/yachting magazines</td>
<td>43%</td>
</tr>
<tr>
<td>scottishcanals.co.uk</td>
<td>30%</td>
</tr>
<tr>
<td>britishwaterways.co.uk</td>
<td>24%</td>
</tr>
<tr>
<td>Sail Scotland</td>
<td>19%</td>
</tr>
<tr>
<td>Tourist board brochures</td>
<td>14%</td>
</tr>
</tbody>
</table>
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

- New Air Routes
- Changing Social Structure
- Increased Affluence
- Convenience Culture
- Fragmentation of Demand
- Environmental Concerns
- Wellbeing & Connecting with Nature
- Risk Averse Society
- Increasing Availability of Information
- Social Inclusion - Entitlement

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?
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
Scottish Canals > Friends

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