



Moray Firth Partnership

Briefing Paper - Recreational Boating in Moray Firth

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Re Members Motion S3M-02472# Stuart McMillan (West of Scotland) (Scottish National Party): for discussion Wed 26 November 2008

“Sailing and Boating Continues to Expand and Contribute to the Scottish Economy — That the Parliament acknowledges that sailing and boating continues to expand as an industry bringing substantial benefits to the economy and offering people jobs; notes that there are some 250,000 yachts in the United Kingdom, of which 15,000 are currently resident in Scotland and that, of these, approximately 5,000 are based on the River Clyde, with 3,000 in marinas and 2,000 on moorings in the Clyde; further notes that the leisure marine industry turnover in Scotland is £98.9 million per annum, that the industry employs 1,816 full-time equivalents in Scotland and supports 7,900 jobs and that the economic benefit of recreational boating in Scotland is estimated to be in excess of £250million; acknowledges that further marina development is scheduled throughout Scotland with proposals for marinas in Greenock that would further enhance the reputation of sailing on the west coast; congratulates everyone connected with recreational sailing and boating for this economic success, and looks forward to even more economic delivery in the future. “

Reason for Briefing Paper

The Moray Firth Partnership was recently alerted to this member’s motion, and has pulled together some very brief statistics, using the best data available to us, regarding recreational boating in the Moray Firth area that may be of interest / use to local members present when this motion is discussed.

Background re Moray Firth Partnership (MFP)

The MFP is the local coastal partnership for Scotland’s largest firth, covering around 850km of coastline from John O’Groats to Fraserburgh, including the inner firths at Beaully, Cromarty and Dornoch. We have been involved in promoting Integrated Coastal Zone Management for over 10 years. We provide a neutral forum to help bring together the wide range of stakeholders with an interest in the Firth, so that problems and opportunities can be reviewed. We provide and share information, and promote joined up thinking, as well as practical projects and developments, starting at community level upwards, and reaching across area boundaries. The MFP is a not for profit organisation and has over 640 members representing businesses, local government, schools, communities and individuals.

Current data / planned studies re Recreational Boating

There is little current data readily available on activity levels or the economic benefits of recreational boating in the Moray Firth area, but this is a very important and growing sector for the local economy, and one whose direct and indirect economic benefits are not fully recognised.

The Moray Firth Partnership (MFP) is about to start a **year long study in 2009 looking at marine recreation and tourism in the Moray Firth**. This will pull together useful data re different marine and coastal based recreation activities, locations, economic value, etc, as well as looking at marine planning issues such as sensitivities and pressures from increased usage, disturbance to wildlife etc. As part of this project, we will review all current marine traffic movements within the MF area, both commercial and recreational. This will help inform the debate over “sustainable” future traffic levels that will not cause unacceptable disturbance to the Moray Firth Bottlenose Dolphin population (protected species and qualifying feature of the Moray Firth Special Area of Conservation).

The Moray Firth Partnership is also about to commission a separate study of the direct and indirect **economic value of the bottlenose dolphins, both for the MF area, and extending**

south to the Tay / Forth areas, covering their known range. This will tie in with, and add information to the planned government funded economic survey in 2009 looking at wildlife tourism in general.

Confusing Statistics - Need for New Data and Consistent Categorisation

The Motion quotes an estimated 250,000 “yachts” in the UK, but the term yacht needs further definition e.g. by size and type. There are a variety of statistics in use, such as numbers of boats, numbers of yachts, etc., which can lead to confusion when the terms are not clearly defined, especially for those not familiar with boating.

We feel there is a clear need for up to date and accurate statistics, spilt into understandable sectors – e.g. sailing boats, motor boats, sailing dinghies, canoes/ rowing boats etc. Again, these could be split between boats that (generally) use moorings and marinas (say over 7.5m) and those that don't. In economic and environmental impact terms the various types of vessel can have very different potential effects and this can have an impact on the acceptability of new schemes.

Sources of Data

One of the presumed sources of data for the Motion on number of yachts is the “Sailing in the Clyde Estuary” report on behalf of the Scottish Enterprise. A breakdown on number of boats in Scotland is also within that report. Please see Appendix 1 for information provided by the British Marine Federation on the number of craft, economic value etc.

Numbers of Recreational Craft in Moray Firth - 2008

Recent surveys¹ have identified over 1,100 recreational craft of 5 metres or over, registered / moored at main harbours and marinas around the Moray Firth. (Some small harbours not yet surveyed.) Of these, approximately 700 are sailing vessels and 400 are motorised.

Current and Planned Pontoon Developments

The Moray based company “Varis Engineering” has been awarded contracts for new MF pontoon / marina developments in the last 18 months, valued at around £2 million,² including:-

Harbour area	No of berths	Approx costs##	Timetable
Wick	70 additional	£500,000	By Easter 2009
Inverness	100 + additional (new marina dev't)	£1.2m	Nearing completion – to be opened Spring 2009
Nairn	Refurbishment of existing berths	£100,000 in two phases	due 2009/10
Lossiemouth	40 additional	£140,000	complete
Hopeman	40 new	£120,000	complete
Total (installed by Varis)	250 + berths**	£2.06 million	

Note 1: ## the above are approximate main contract costs and do not include all ancillary works.

Note 2: These additional/new facilities should not be viewed as competitive locations but as an opportunity to support the creation of an east coast ‘cruising ground’. A range of alternates will generate the demand for additional facilities and services in surrounding local areas and create greater economic benefit as boats find more destinations to visit.

Note 3: **Banff Marina (developed by another contractor for Aberdeenshire Council) opened in 2007 with 76 pontoon berths. All taken up apart from seven berths allocated for visiting boats /refuelling. **Total for all recent / ongoing MF pontoon developments in excess of 320 berths.**

¹ A harbour survey carried out by Whiteness Property Company in Feb.2008, as part of their planning application for a 500 berth marina at Whiteness, identified a total of 1048 recreational type vessels over 5 metres, berthed/moored at main harbours from Wick to MacDuff. 134 of these were canal boats that don't go out to sea. 686 were sailing vessels and 362 motorised vessels.

² Data provided by Varis Engineering.

Note 4: Inverness Harbour's new quay and marina development will enable the port to maintain its recent growth and strongly benefit the city's economy. As well as the 100 + new berths and facilities, there will be extra berthing facilities for small cruise ships, capitalising on the opportunity for Inverness to host maritime events and on the booming cruise market.

Note 5: Inverness is likely to be at the centre of longer term expansion and aims to be developed as a 'Hub' for visiting boats and transit sailing – serving the marine tourism markets of the West Highlands, the sea canals, the Northern Isles, Scandinavia, the Moray Firth and the east coast marinas to the south of Peterhead.

Inverness Marina³ Development

The new Inverness Marina development provides a capacity for visiting yachts to stay and the resultant visitor spend in Inverness and the wider area is expected to total more than £750k per annum. The Marina is already getting advance bookings for vessels from France, Norway, Holland, Denmark and Sweden who previously would have sailed past the area as there was no place for them to stop. This visitor spend is additional as these customers come with their own accommodation, i.e. in peak months when hotels/guest houses are full these visitors can still come and spend money in shops, restaurants etc.

Inverness Marina's stated aims and objectives include to:-

- market Inverness as a cruising centre of excellence, in conjunction with VisitScotland
- encourage the development of cruising tourist facilities throughout north east Scotland
- provide safe berthing to local leisure boat users and marina facilities to visiting yachts
- provide facilities for local sailing schools
- provide facilities and access to the water for disabled sailors
- re-invest surpluses into more and better marina facilities

Other Planned Marina Developments

Whiteness Properties have applied for planning consent for a new 500 berth marina at Whiteness Head, between Ardersier and Nairn.

Caledonian Canal

British Waterways, the body responsible for maintaining and operating the Caledonian and Crinan Canals, and the organisation that re-opened the Millennium Link, has over 1500 boats (commercial and recreational) travelling on passage through its waterways each year. Around 20% of boats transiting the Caledonian Canal are from Northern Europe with an additional 2% coming from North America.⁴

Recent Boating Events in Moray Firth

Scottish Traditional Boat Festival at Portsoy (June /July) (Annual)

There have been five visitor surveys in recent years – the latest is "Plain Sailing 2007". Visitor numbers went up from 7,000 in 2001 to 16,500 in 2007. Visitors from beyond Aberdeenshire and Moray went up from 7% in 2001 to 34% in 2007. Estimated visitor spend has gone up from £330,000 in 2001 to £1,717,694 in 2007.

Moray Firth Flotilla 2007 (one off event)

Organised by Moray Firth Partnership as part of Highland 2007 – over thirty traditional boats took part in a sail around the coast calling at Wick, Lybster, Helmsdale, Cromarty/Invergordon and Buckie with community activities at each port, ending at Portsoy to start Boat Festival. Costs of staging event approx £103,000, plus the cost of local community events. Research carried out during the event showed that of the estimated 34,000 visitors to the Flotilla, approximately 13,000 (39%) were from the Highlands and Islands, 12,000 (34%) from elsewhere in Scotland, 4,000 (12%) from elsewhere in the UK and 5,000 (15%) from outside the UK.

Moray Firth leg of 2008 Round Britain Power Boat race

Significant concerns raised re disturbance and potential of collisions re dolphins / other cetaceans.

³ Information provided by Inverness Marina Ltd.

⁴ Source: Extract of report to Inverness Harbour Trust, 2007, by McKenzie Wilson Partnership

Economic study on the viability of proposed Banff Marina –Nov. 2004

This economic viability study carried out by Aberdeenshire Council found that:-

- there was a lack of marina berths
- around 100 vessels were thought to be on the waiting list for marina berths in the North of Scotland alone (2004)

The Banff study report into the viability of the development estimated that the Marina could generate a net additional on-site expenditure of £28,000 per annum to the local economy which would almost support one full time equivalent job. It also estimated that the project would generate a further £237,000 of net off-site expenditure which could support a further 6 jobs. This off-site income would arise from improved business in the boat service sector, eating out and accommodation and services for visitors.

The Banff Marina development opened in 2007 with 76 pontoon berths. Six berths have been allocated for visiting boats, 1 for refuelling, and the remainder already occupied.

Demand for the Banff Marina has exceeded expectations and it is clear that a good facility encourages visitors to the area and helps stimulate the local economy.

Indications of increasing Boat Club membership / interest in boating.

There are clear indications of growing interest and enthusiasm across all age groups for yachting and recreational boating in the Moray Firth. As an example, the (Fortrose) Chanonry⁵ sailing club has attracted 116 new members in the last two years including 24 families and 21 juniors. A week long sail training event they held for young people aged 8 – 12 in 2008 attracted 18 participants, with another 3 on the waiting list. Adult training at the club in 2008 covered an age span of 29 - 61 and in the last 2 years the club has had French, Hungarian and Polish members. The club has hosted 6 North of Scotland Sailing Squad training weekends in the last 12 months attracting young sailors from as far north as Shetland and as far west as Plockton. At the same club the number of yachts kept on moorings has increased from 28 to 34 in 2008 and the club's visitors' moorings have had a healthy usage including foreign flagged yachts and boats on passage from the south of England.

Cruise Ships in Cromarty Firth

In 2008, 51 cruise ships docked at Invergordon, bringing around 42,000 passengers to the area. A passenger spend survey, carried out by the Cromarty Firth Port Authority, estimated that around £7 million was spent by these passengers in the Moray Firth area.⁶

For More information, contact:-

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⁵ Information provided by the Rear Commodore of Chanonry Sailing Club

⁶ Data provided by Cromarty Firth Port Authority

Appendix 1

Further Data Available from British Marine Federation

The following data, provided by BMF⁷, is from a combination of BMF's Key Performance Indicators report and BMF's Economic Benefits of UK Boating. Scottish Enterprise and Scottish Parliament have received all of BMF's data. The economic assessments we conducted in the latter report is for all boating, including canoeing, from which the £250 m economic benefit for Scotland comes from (min £250m - max £300m).

BOAT PARK (private and commercial ownership in the UK)	Sailboats	Inboard/ sterndrive motor boats	Other rigid incl outboard motor boats	Inflatable boats 2.5m+ and 20kg+	Total
2.5m (8ft) up to 7.5m	172,285	30,730	150,865	76,000	429,880
7.5m (26ft) up to 12m	33,300	51,930	4,985	2,600	92,815
12m (40ft) up to 24m (80ft)	6,585	12,075	N/K	0	18,660
above 24m	135	70	0	0	205
Totals	212,305	94,805	155,850	78,600	541,560
PWCs (Personal Watercraft)	15,000-20,000				

For marina information – the BMF's latest Economic Benefits reports state there are:

- 4,450 berths in Scottish coastal marinas
- 570 berths in Scottish inland marinas

⁷ Info provided via Karen Boss, Researcher British Marine Federation 01784 223615