



Leisure Marine Survey Report

September 2016

Executive Summary

The boat-owning community is an important part of Guernsey's way of life and economy. In order to ensure that service providers, such as Guernsey Harbours and Guernsey's marine trade industry, are able to understand more about their needs and seek to make improvements to services offered to boat owners it is important to have robust empirical evidence to support developments.

For this reason Guernsey Harbours and the Guernsey Marine Traders Association have worked with the Guernsey Boatowners Association to survey local boat owners. The survey, completed during the summer of 2016, investigates demographics, boat usage, servicing and maintenance, impact on the economy and harbour facilities. The survey was well supported with more than 600 local people, the majority of them boat owners providing a response. More than 70% of respondents are members of the GBA.

Based on the survey responses the boat-owning community (Guernsey Harbours has records for 4,500 Bailiwick registered boats) generates a spend of £13.9 million to local servicing, maintenance and marine supply businesses every year.

This survey assumes that this does not include money that is spent by boat owners with other local businesses such as brokers, insurance providers, fuel suppliers and other fees such as mooring fees and laying up fees – all which provide a benefit to the local economy.

Boat owners themselves are predominately male and over the age of 40, with the majority owning smaller boats moored in one of Guernsey's marinas.

In general, customer ratings for Guernsey Harbours and Guernsey's marine traders were positive; however the survey has also provided strong opinions on areas for improvement.

A desire for improvements to harbour facilities, customer service, car parking and security have been noted in the survey. Most respondents also noted that they had been inconvenienced by the removal of hosepipes from pontoons in Guernsey's marinas.

The majority of respondents responded positively to the survey, with 78% saying they thought Guernsey was well served by marine traders and 83% saying they had no plans to give up boating.

The most impactful issue raised by respondents is the cost of boat owning and this is given as the most likely factor to cause an individual to give up boat owning.

The survey response in general was positive in tone and in ratings; however some boat owners did raise concerns about the potential for increases to mooring fees.

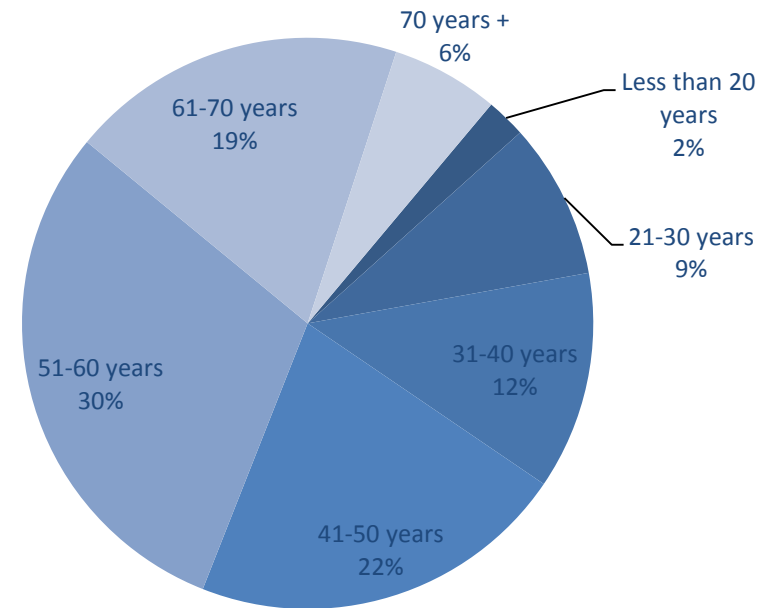
Section 1: Demographics

Guernsey Harbours estimate that there are 4,500 boat owners in the Bailiwick, out of a total population (over the age of 16) of 52,396 people (2015 Electronic Census). Given that boat ownership is often a family activity it would also be relevant to compare with the number of households - 26,861 properties (2015 Annual Housing Stock Bulletin). It is possible therefore to view nearly 17% of Guernsey households as having access, or an interest, in boat owning.

The survey itself was completed by 624 individuals, the majority of which (52%) were between 41-60 years old, with 77% being over the age of 41. This supports the commonly held perception that boat owning is generally entered into later in life.

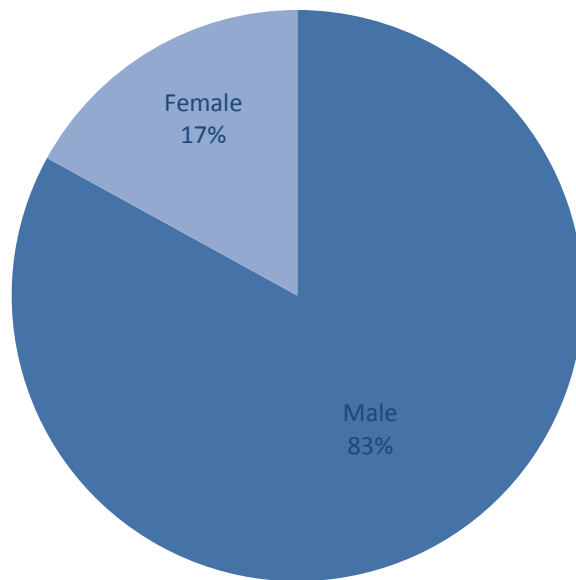
70% of responses were received from GBA members.

Age of survey respondents



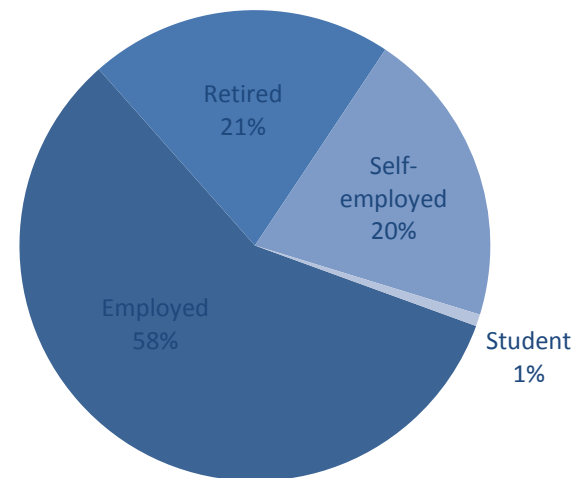
Of the 624 respondents only 17% were female. This reinforces the perception that boat owning (not necessarily boating/sailing) is predominately a male activity.

Gender of respondents



The majority of boat owners are employed, with 21% noting that they are retired. Perhaps not surprisingly only 1% of boat owners are students. This can in all likelihood be attributed to the financial commitment involved in owning and maintaining a boat.

Employment status of respondents

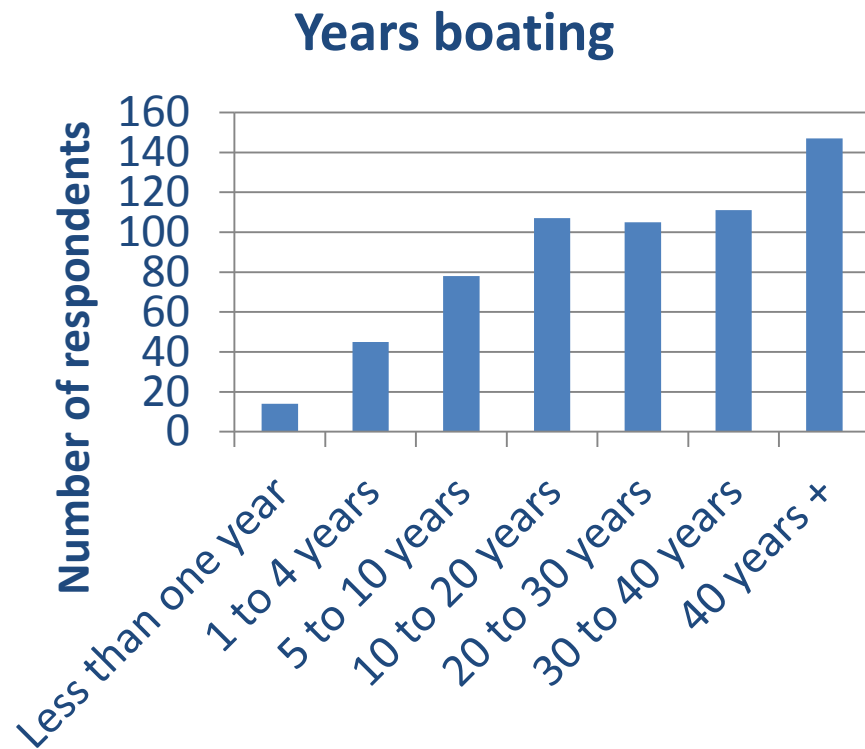


In general the demographics suggest that boat owning in Guernsey is currently an activity mainly undertaken by men over the age of 40 who are securely employed, self-employed or retired. This reflects their ability to manage the financial commitment that is necessary to buy and maintain a boat. Factors that may come in to play are property/mortgage commitments, the age of any children the boat owner may have and the amount of leisure time available to them.

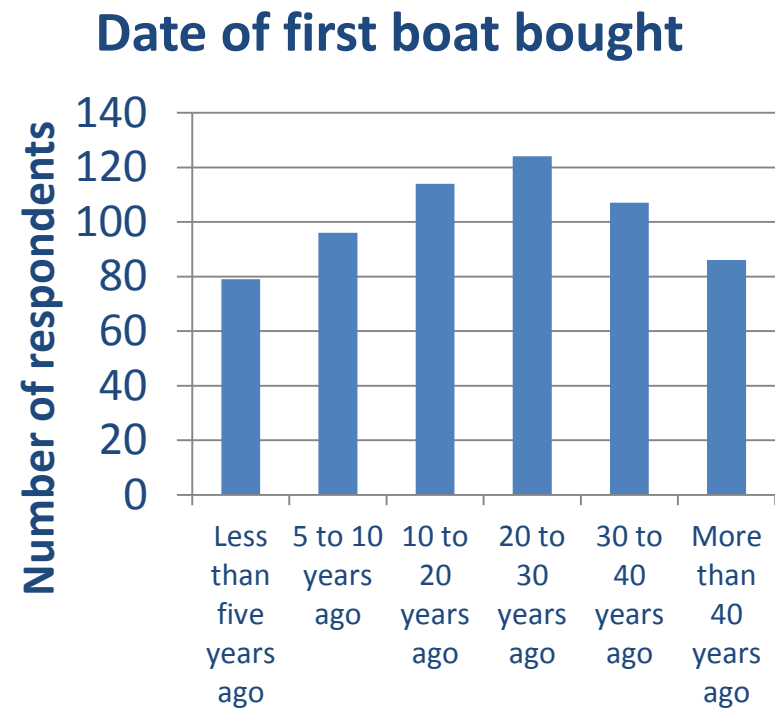
This demographic information is similar in Jersey where a recent survey of boat owners had similar results: 97% of the boat owners who responded were men (162) and 88% of the total respondents were aged over 45 (149), with the largest proportion being in the 55-64 age group at 32% (55). (Jersey Marinas Survey June 2016)

Section 2: Boat owning

90% of the survey respondents currently own a boat. Of those the majority have been involved in boating for a considerable time, with 77% having been boating for more than 10 years.

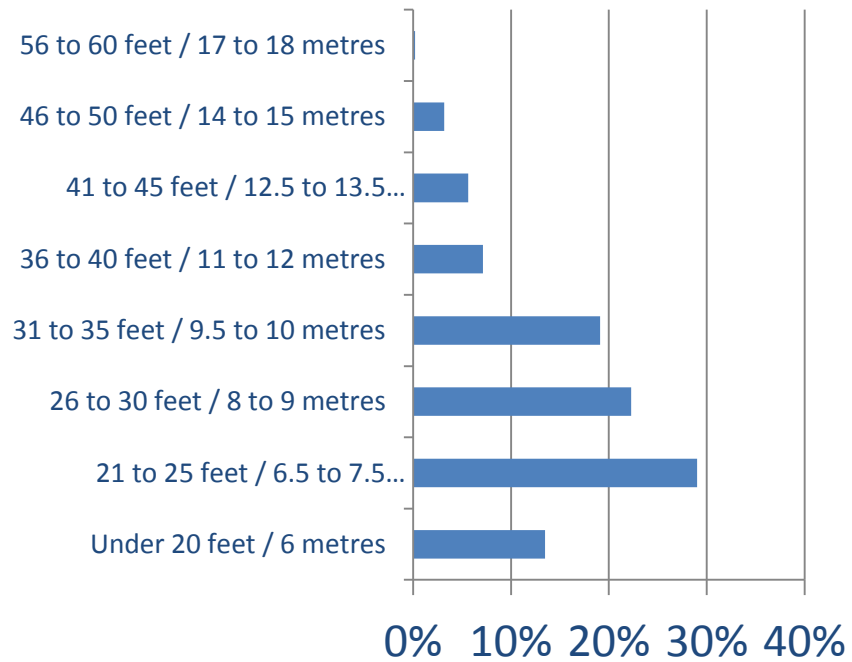


More than 22% of respondents have taken up boating in the last 10 years. This is a higher proportion than those who started in previous 10 year periods, however it is not known what percentage of those periods will subsequently have stopped boating in the intervening years. It is still a positive sign that in the last 10 years, 5 years and in the last year, that people are taking up boating in Guernsey. 29% of survey respondents said that they had bought their first boat within the last 10 years.



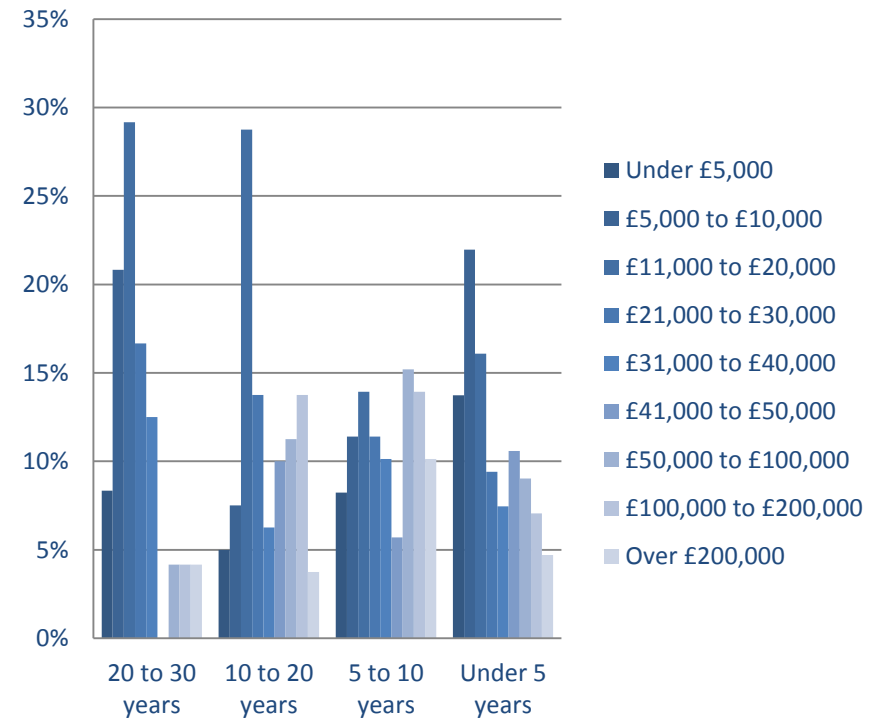
The majority of boats in Guernsey are small with 65% being 30ft/9m or less in length.

Length of current boat



In terms of cost over half (56%) of boats cost less than £30,000. A significant percentage (16%) of boats cost more than £100,000 and that figure increases to 27% for boats costing more than £50,000.

Cost of boat purchases in last 30 years



In the last 30 years this spread has remained relatively consistent with boats changing hands for a wide range of prices, but with the majority less than £30,000. If a trend can be discerned it is that between 5 and 10 years ago people in Guernsey were spending more on their boats, while in the last 5 years the number of boats costing less than £10,000 has increased as a proportion of total sales. (NB figures have not been adjusted for inflation.) There may be a variety of factors at play here including changing economic conditions resulting in more modest purchases, or it may be that smaller, less expensive boats are changed more often and boat owners are sticking with larger boats for longer rather than being able to 'trade up' as they may have in the past.

21% of boat owners told the survey that they took out a loan or financing option to help pay for their boat. With the majority of boat owners being over the age of 40, and with boat sales under £30,000 being the most common it is possible to view this in context of using disposable income, savings or other financial windfalls as well as reflecting the general level of financial prosperity in Guernsey.

Section 3: Future of boat owning

83% of boat owners indicated in the survey that they had no intention of giving up boating as a pastime. Of the 17% that did indicate that they were considering giving up, cost was the factor highlighted by more than half.

The cost of mooring fees, or the potential for an increase in mooring fees was cited by 25% of those respondents. More than 75% respondents who were considering giving up boating noted financial factors as the basis for their decision making.

"Mooring fees are too high. Weather. Tides. And no hose pipe on pontoon! "

"Very expensive. Marina costs and servicing costs are very high for many people."

"If I do it will be because of increasing costs involved, especially with what I anticipate will be a massive increase in years to come for mooring fees."

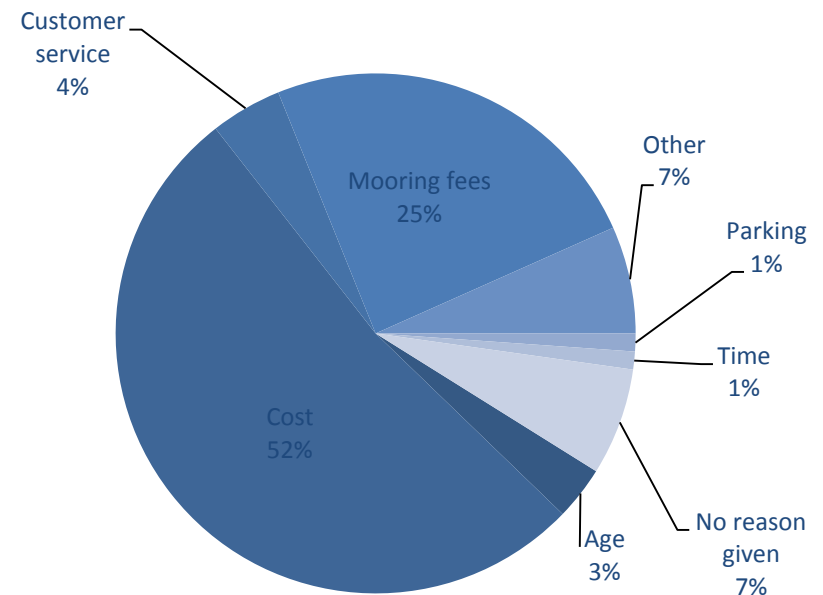
"Getting old and not same interest in cruising and cost too high for time actually used."

"Lack of use for the cost involved."

"Lack of services and price of mooring"

"Too expensive - especially since retirement."

Reason for considering giving up boating (17% of responses)



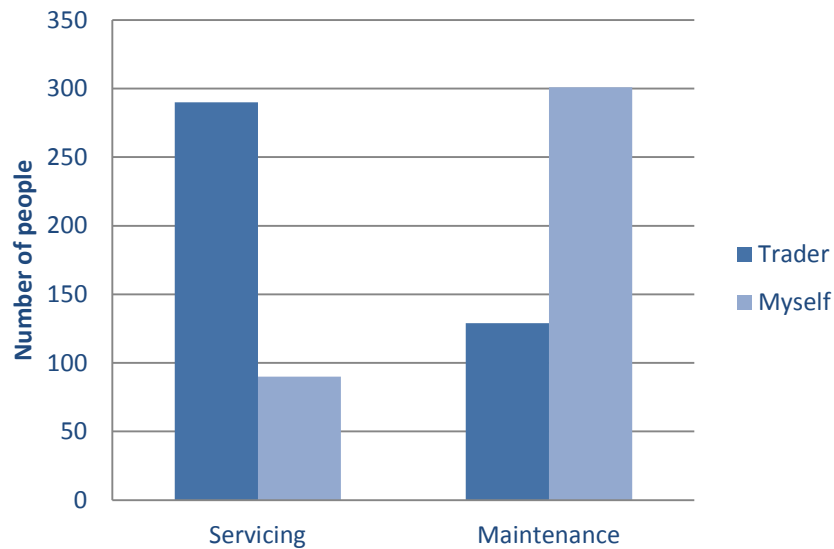
Section 4: Boat Maintenance

A key part of boat owning is boat maintenance and servicing. Many boat owners undertake basic repairs and maintenance themselves. But there is also an important network of marine traders and chandleries that service boats and provide supplies and equipment to boat owners.

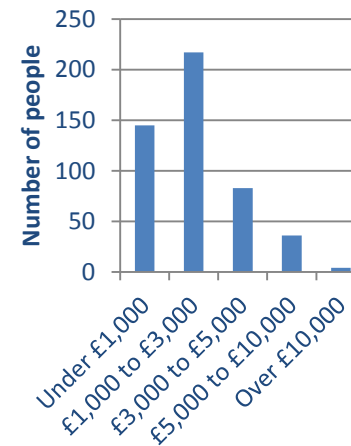
Servicing and more complicated repairs are often referred to a trader with 76% of responses to this question stating that their boats are serviced by traders.

Boat owners, according to the survey, spend on average £2,389 on servicing and maintenance each year, plus £822 on equipment.

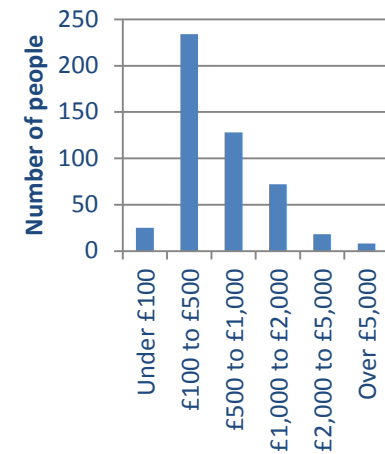
Service and maintenance undertaken



How much is spent on serv/main



How much is spent on equipment

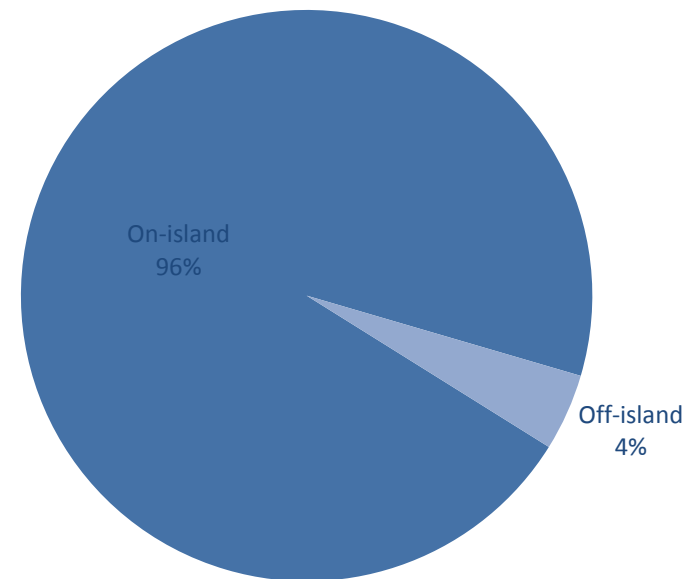


There are 4,500 boat owners (Guernsey Harbours records show there are 4,500 registered boats) in the Bailiwick and the vast majority of respondents indicated that they use local traders for servicing.

If 4,500 boatowners spend on average £3210 per year on servicing and maintenance, with 96% of that on-island, there is a potential spend of £13,868,090.72 per year in this area. This money goes into and provides benefit for the Guernsey economy attributable to boat owning as an activity.

This survey assumes that this does not include money that is spent by boat owners with other local businesses such as brokers, insurance providers, fuel suppliers and other fees such as mooring fees and laying up fees – all which provide further benefit to the local economy.

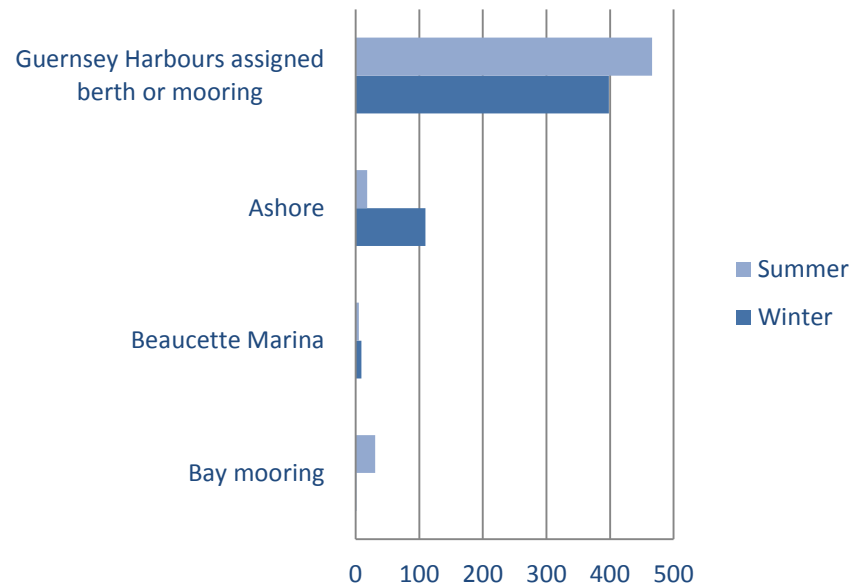
Servicing undertaken



Section 5: Boat mooring and storage

90% of local boat owners keep their boat in an assigned berth or mooring within Guernsey Harbours.

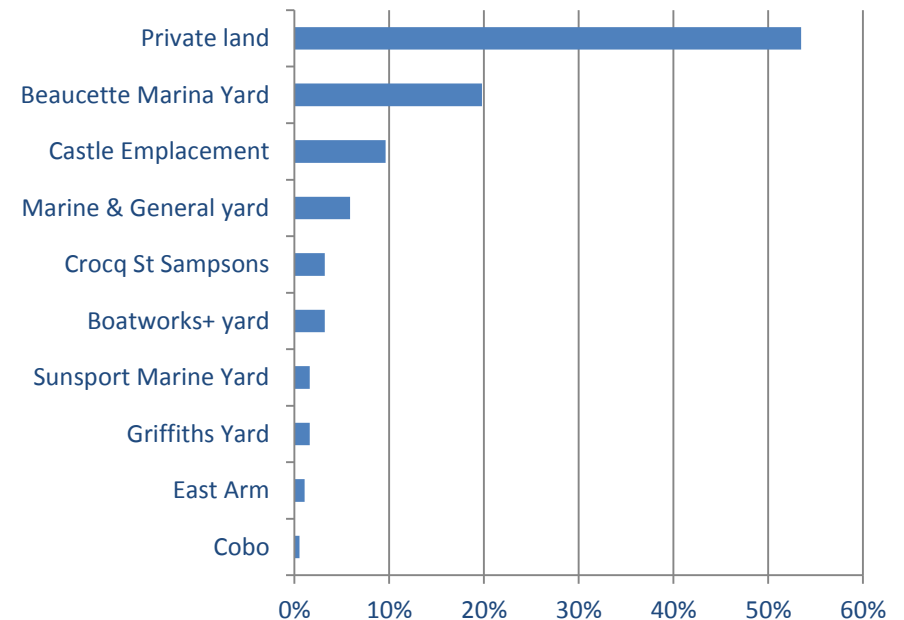
Where do you keep your boat?



During the winter 21% of boatowners keep their boats ashore with over half kept on private land.

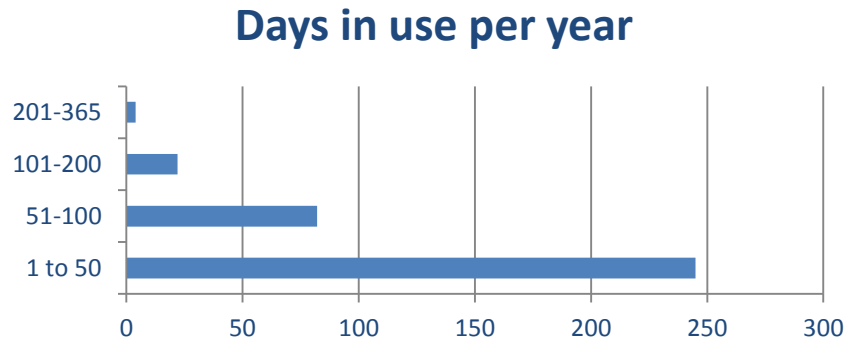
Only 2% of respondents keep a boat off island.

Where do you keep your boat when it is ashore?



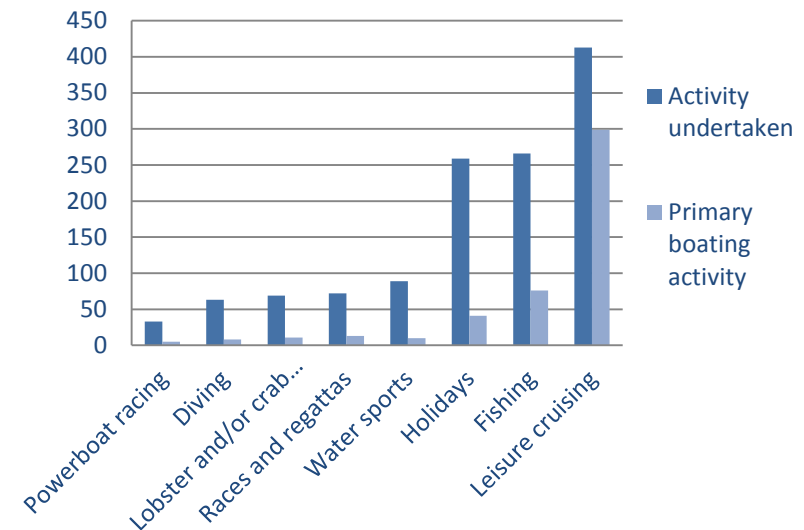
Section 6: Boat usage

The majority of respondents use their boat between 1 and 50 days per year.



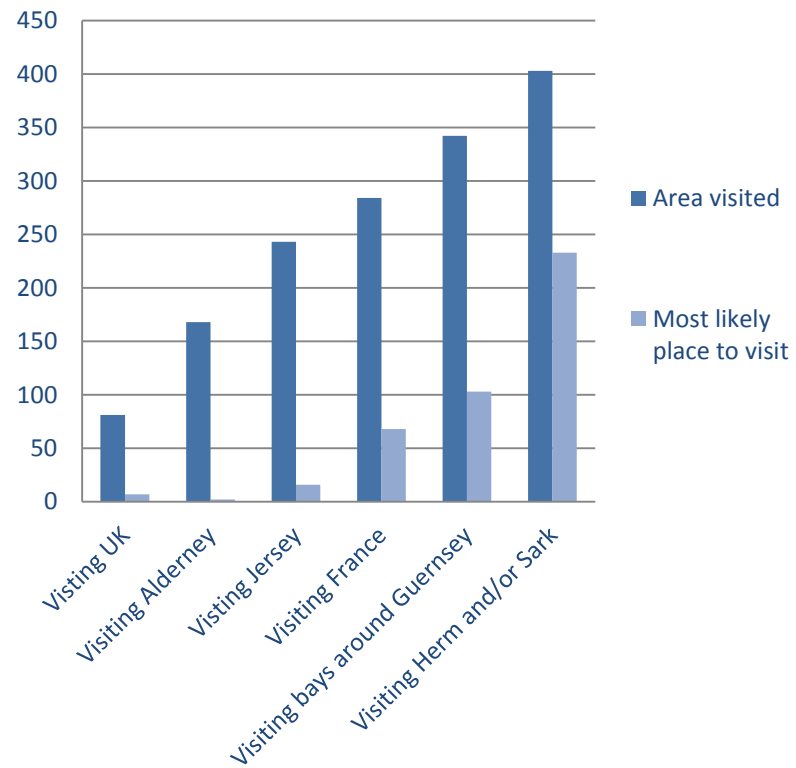
Some respondents noted that they use their boat several times a week all year round. Respondents to this question noted that the amount they use their boats relies on a number of factors, particularly the weather.

Boats in Guernsey are used for a wide variety of activities. Respondents to the survey noted that leisure cruising was the most frequently undertaken activity.



Leisure cruising, holidays and fishing are the three main activities linked to boat owning in Guernsey. Other more specific activities include racing (both motor and sail), diving and other water sports.

When leisure cruising, most respondents indicated that they visit Herm and Sark most frequently, followed by France, Jersey, Alderney and the UK. Visiting other bays around Guernsey is also popular with local boat owners.



Section 7: Refuelling

Use of fuel is split roughly in half with just over 50% of boat owners using petrol, with slightly more using diesel. It should be noted that in terms of volume, this means more diesel is used as petrol will be used for smaller boats and outboard motors, while diesel will be used for large on-board fuel tanks.

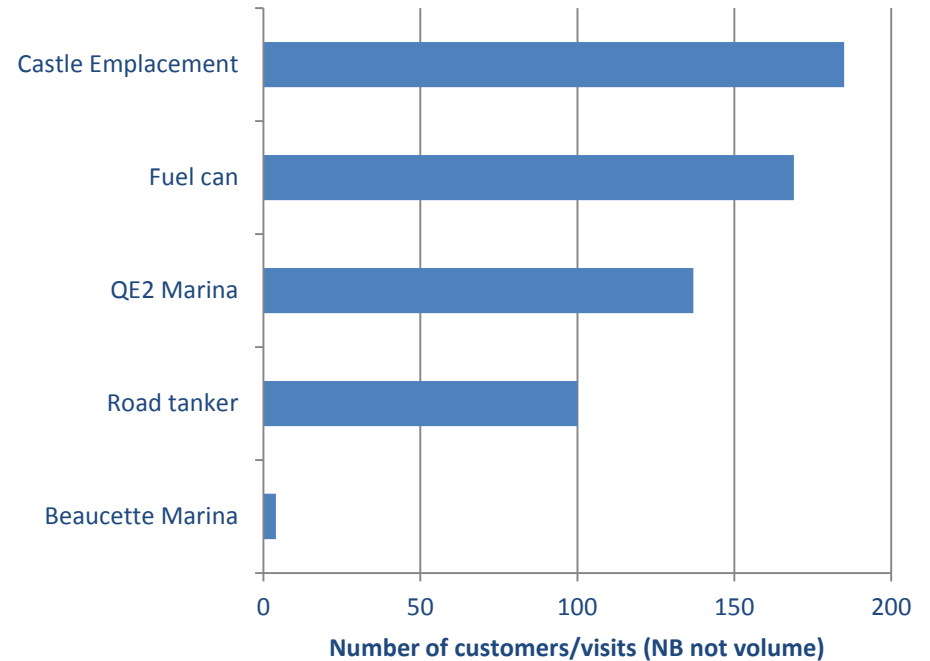
The overlap of use is most likely explained by boat owners having more than 1 boat, or more than 1 engine in their boat (such as an outboard motor), meaning they use more than 1 type of fuel.

Castle emplacement is the most frequently-used refuelling station, with many boat owners also using fuel cans and the QE2 marina station.

The use of fuel cans is not likely to be many boat owners main source of fuel – this method is most often associated with small boats and outboard motors where large quantities (more than 5 litres) are not required.

100 respondents (17%) said they also booked a road tanker to deliver their fuel. Given that this method is for bulk deliveries only this represents a very significant proportion of the volume of fuel sales in Guernsey.

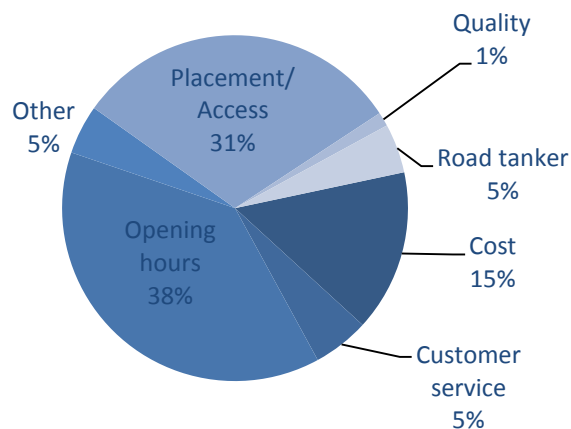
Where do you refuel?



The majority of respondents (49%) said that refuelling in Guernsey was convenient. 18% rated it as very convenient. 33% of respondents said that refuelling was inconvenient or very inconvenient.

The survey asked for comments on why one third of respondents found refuelling inconvenient. Of those that replied, the biggest proportion (38%) indicated that they felt opening times were not ideal, particularly with regard to the QE2 marina. The placement of the refuelling stations was also noted, with 31% citing difficulties using pontoons, queuing and with the sea conditions in the harbour. This is primarily related to the refuelling station at Castle Emplacement. Cost was a main factor for 15% of respondents with 5% citing customer service as the biggest issue. 5% also noted that they would like to see more provision for road tanker refuelling.

Reasons why refuelling is inconvenient



"QEII station closed for much of the winter."

"Generally Ok but very congested in high summer - could do with a bigger fuelling asset in the main harbour."

"Fuel suppliers should be encouraged to extend opening hours to coincide with the tides at times of high boat use (e.g. summer week-ends) so that users can refuel on returning from trips."

"The fuelling station in the QE2 Marina could be open more hours earlier in the season especially weekends"

"Refuelling at castle emplacement gets too busy in the summer. Need a longer mooring and hoses for the pumps. The petrol pumps are often blocked by larger craft waiting on diesel."

"Working full time requires forward planning. More flexible fuel options would be a benefit."

"Fuelling berth subject to heavy swells at times."

"The QE2 Marina opening times are far from customer friendly. The Castle Emplacement facilities are tiresome and can be quite nerve racking with visitors finding their way through the fairway and being unfamiliar with the fuelling system."

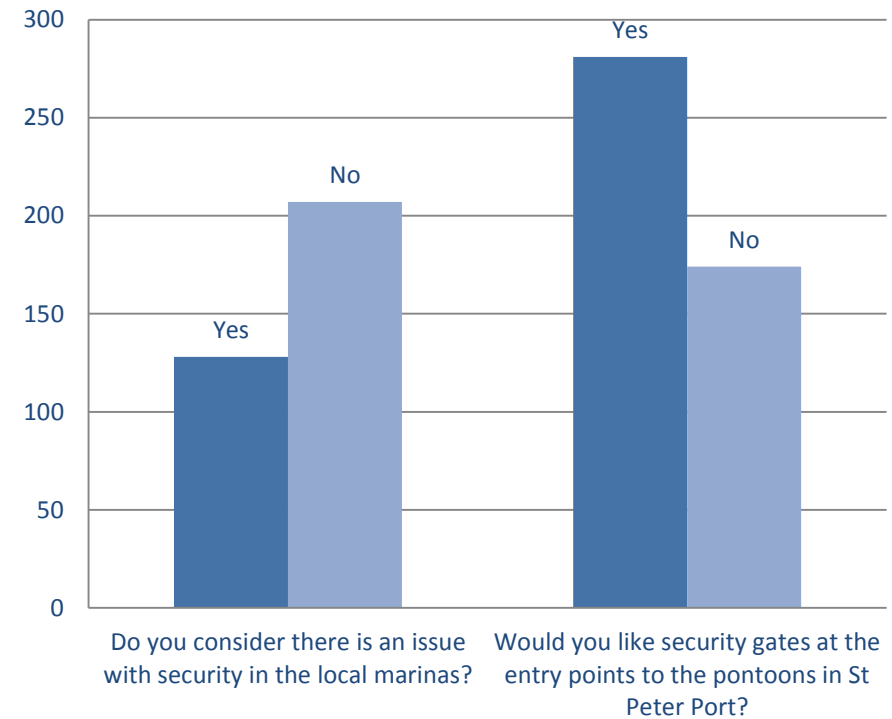
Section 8: Security

Overall more respondents were satisfied with security arrangements at the marina, with 43% answering that they did not feel there was an issue with security. 27% said they did have an issue with security arrangements and 30% offered a comment.

The 145 comments about security were mostly negative (64%), with 23% highlighting issues with general security, 19% calling for security gates to be installed. Only 3% of comments mentioned security cameras while 8% of the comments chose to mention/report incidents of theft.

The majority of respondents (62%) stated that they would like to see security gates installed at entry points to the marinas.

This shows there is not a clear consensus, or evidence, to suggest that there is an issue with security in the marinas, nor is there a strong enough case to suggest that further attention in this area is not required.

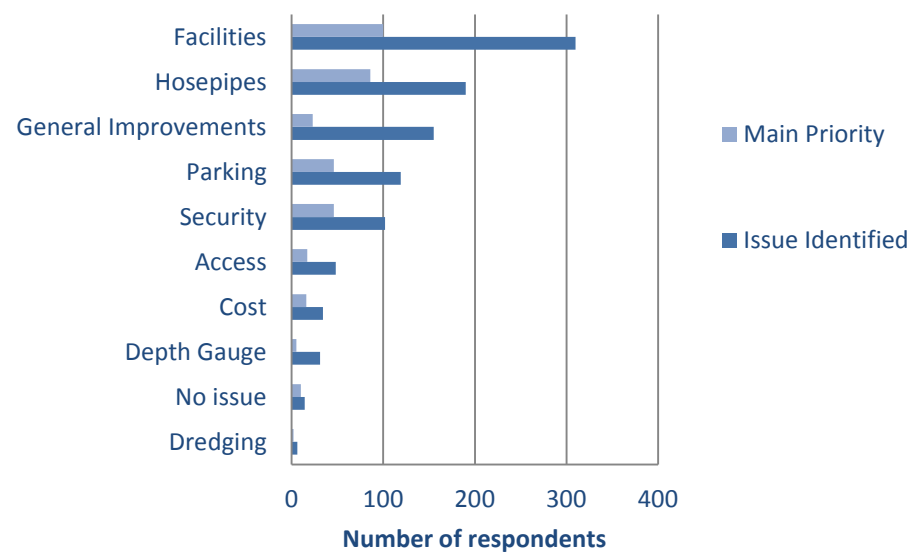


Section 9: Facilities

Respondents were asked about the recent removal of hosepipes on marina pontoons. 85% said they had been inconvenienced by the removal.

were asked to identify key issues for improving the harbours, with 24% of respondents rating it the most important issue for improving Guernsey harbours for berth or mooring holders.

Areas of the harbour where improvements would benefit boatowners



Improvements to facilities (such as toilets) were identified most frequently, with parking and security also important suggestions. The issue of hosepipes featured prominently when boat owners

"Better drying out and laying up facilities"

"Hose pipes returned"

"Ideally for the QE2 an all tide marina gate"

"Decent available laying up facilities rather than car parking"

"Parking at a reasonable rate"

"Parking long term"

"Showers and toilets"

"Hoses put back on pontoons"

"Better toilet facilities"

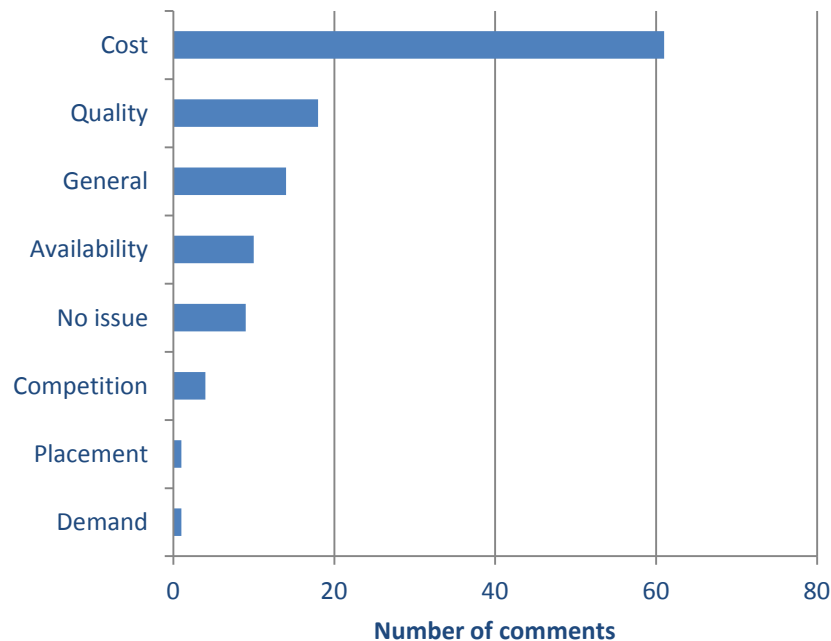
"Better maintenance of existing facilities"

Section 10: Marine trader ratings

Boatowners were asked to rate their experiences with the local marine trade industry and maintenance and repair companies.

The majority (78%) stated that local boatowners were well served by the local marine trade industry. Comments were invited to provide feedback on boatowners needs. 119 respondents out of 624 provided a comment – just over half of those comments were about cost (around 10% of total survey responses).

Comments on marine traders



"On the whole yes, price/response ratio could be improved"

"In general I think the local marine trade industry provides an acceptable service. However, in comparison with many centres on the south coast of the UK, or even Jersey, there is certain to be less demand for specialist services locally. This can lead to a lack of experience in certain areas. It can also result in inflated prices."

"Serviced well yes but they are inclined to be a bit on the expensive side"

"The smaller traders need more lay up areas."

"Good service but can be very expensive when compared with other areas."

"Good service but expensive"

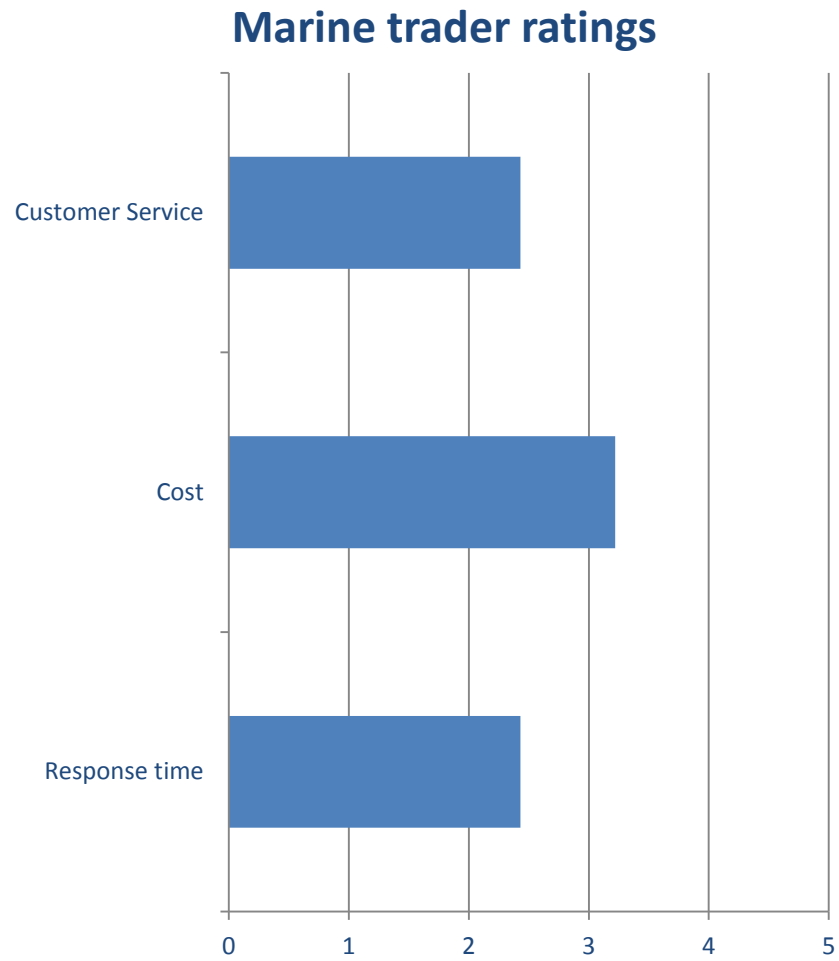
"Quality of work is poor and expensive - so I use traders in Jersey."

"The suppliers on the island generally look after us well. However, there is limited choice on where to go for items so unfortunately at times one is forced to look outside the island, particularly for technical items."

"Good for maintenance and service etc but limited for things like RYA training, charter boats, skippered charter etc."

"Very expensive, absence of rigging experts. Absence of Electronic experts for certain types of instrumentation."

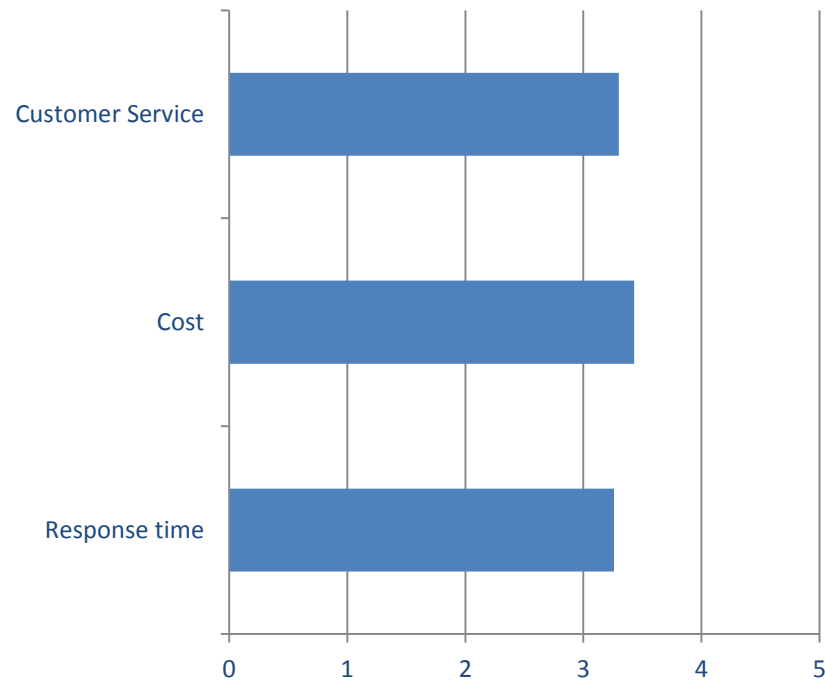
Respondents also rated the marine traders out of five on customer service, cost and response time, with 1 being poor and 5 being excellent.



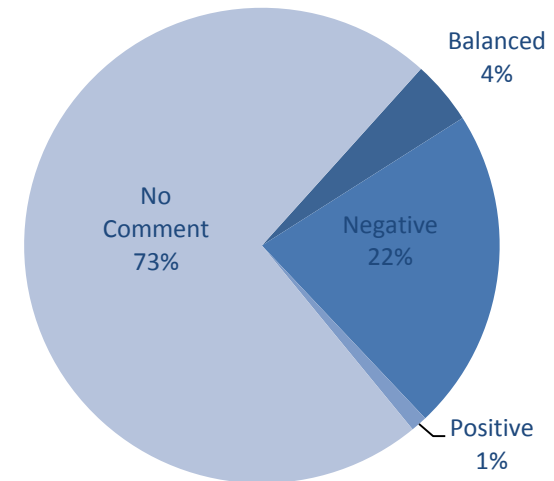
Section 11: Guernsey Harbours rating

Respondents rated Guernsey Harbours positively, with customer service, cost and response time all rated as higher than 3 out of 5.

Guernsey Harbour ratings



Respondents were also asked for general comments and it is here that several areas can be identified that boat owners believe could benefit from improvement.



171 comments were made, with 22% of survey respondents leaving a negative comment. The main areas mentioned in comments were customer service, mooring fees and general facilities.

"Re-instate hoses (most marinas have them) Monitor fishing pots in or near fairways Re-instate Guernsey Coastguard as before Examine the staff structure - particularly at the top."

"Guernsey harbours could be far more proactive dealing with issues/problems, promoting and protecting the interests of local boat owners"

"Happy to carry on boating providing the mooring fees don't get too much."

"Guernsey harbours are great but please keep costs as low as possible....it will attract more people to boating - and bring back some lapsed boaters."

"Any significant rise in marina berth fees would almost certainly force me to sell my boat and give up boating"

"Harbour changes in recent years frequently have been alarming and usually to the inconvenience of boat owners who have historically funded all the improvements."

"I think that most boat owners appreciate good facilities at a reasonable cost. This will ensure that the wonderful pastime of boating remains accessible to the greatest proportion of the Island's population including those who may not be earning the highest incomes."

"I am fairly satisfied provided marina fees do not increase and diesel remains tax free."

"The worst feature of local boating is inadequate facilities to wait across tides. The local only pontoon is far too small and constantly fully occupied by very small boats/ribs (who also have nowhere else to go) but who don't need deep draft. Please fix it."