

Welcome to Scotland's Marine Tourism and Recreation Business Survey

The way Scotland's seas and coasts are managed is changing.

Marine Scotland, the Scottish Government body with responsibility for managing Scotland's waters, needs more information about how people use the sea for recreation and tourism. We also need to know how it supports the Scottish economy. This survey aims to gather that information.

As part of a wider information gathering project we want to find out more about the businesses involved in marine recreation and tourism. This will help ensure that future management of our seas and coastline takes full account of their importance.

By completing the questionnaire you will make a real difference - helping ensure that the importance of different marine businesses and their impact on the Scottish economy is properly recognised.

Please feel free to forward the survey to others who you think might like to take part.

The survey will run for three months, from 1 August to 31 October 2015.

We would also be delighted if you were able to complete the parallel survey, gathering views of those who take part in marine or coastal recreation.

Thank you very much for taking part.

Sarah

Sarah Brown
Project Manager
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Information you provide will only be used for the purposes of this study and not passed to third parties. Business details will be made anonymous for the purpose of analysis and reporting.

About your business

To start the survey, please could you tell us a bit about your business.

1. What is the name of your business (leave blank if you like to remain completely anonymous)?

2. What is the postcode of your business? (please provide the first part of your postcode as a minimum)

Your recreation and tourism offer

3. Please indicate which of the following are provided by your business

- Organised or led excursions on the coast or at sea
- Instruction or training in coastal or marine recreation
- Provision of facilities providing coastal or marine recreation (e.g. marinas, moorings or pontoons)
- Hire or charter of equipment or boats
- Operation of museums, visitor centres, historic buildings or nature reserves in coastal locations
- Operation of a cafe, pub or restaurant in a coastal location
- Operation of accommodation in a coastal location

Other (please specify)

4. To which of the following marine and coastal activities does your business relate (please tick as many as are applicable)?

- General marine and coastal recreation (beachgames, beach combing, rock pooling, painting, kite flying, sunbathing, naturism, picnicking, yoga, paddling, walking less than 2 miles, sightseeing general, fossil hunting, beach team sports, body boarding, general swimming and snorkelling, coastal cycling, horseriding, dog walking)
- General marine and coastal tourism activities such as scenic drives or bus tours
- Visits to historic sites or to attractions such as museums or aquariums on the coast
- Walking at the coast (more than two miles)
- Long distance swimming in the sea
- Bird and wildlife watching
- Climbing, bouldering and coasteering at the coast
- Land yachting, power kiting, and kite buggying at the coast
- SCUBA diving in the sea
- Surfing, surf kayaking or paddleboarding in the sea
- Windsurfing and kite surfing at the coast
- Canoeing or kayaking in the sea
- Rowing and sculling in the sea
- Water skiing and wakeboarding in the sea
- Dinghy racing at sea
- Yacht racing at sea
- Sailing cruising including dinghy cruising at sea
- Motor cruising at sea
- Power boating at sea
- Personal watercraft (jet skis) at sea
- Sea angling - from the shore
- Sea angling - from a private or chartered boat

Other (please specify)

5. Approximately what proportion of your business activities involve the coastal and marine environment? For example if you run short boat trips and a village shop then it might only be 50% of your business that relies on the sea.

- less than 25%
- 25 to 50%
- 50% to 75%
- more than 75%

6. Which months do you operate?

- All year
- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

Coastal trips and excursions

7. Does your business run coastal or marine trips and excursions?

Yes

No

8. What factors influence your choice of where to take clients when you are planning an organised trip to the coast?

- My knowledge of the Scottish coastline
- The abilities of the clients in question
- Client requirements
- Prevailing weather conditions, tides or seasonal factors
- Quality of opportunities for coastal or marine recreation
- Scenic qualities
- Wildlife
- Historic and cultural heritage
- Range of other things to do
- Availability of suitable accommodation
- Other facilities such as shops, cafes or pubs
- Distance from your business base
- Not applicable

Other (please specify)

9. Where do your clients come from?

	less than 10%	10-25%	26 - 50%	51 - 75%	more than 75%
within 10 miles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
the rest of Scotland	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
the rest of the UK	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
the rest of Europe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
the rest of the world	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Don't know

10. Are you aware of any marine protection measures in the area(s) where you take your clients? E.g. Sites of Special Scientific Interest, Marine Protected Areas

- Yes
- Some awareness, but not detailed knowledge
- No

11. Codes of Conduct apply to some recreational activities undertaken on the Scottish coast. Please could you indicate which of the following you are aware of.

	To a large extent	Somewhat	Very little	Not at all
Scottish Marine Wildlife Watching Code	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scottish Sub Aqua Club Guidance for Divers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
British Kite Surfing Association Code of Conduct	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scottish Outdoor Access Code	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wild Scotland - Sea Kayaking Best Practice Guidelines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The GreenBlue Codes of Conduct Guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Personal Watercraft Guidelines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fossil Collecting Code	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please list any others you are aware of

12. Are you a member of a national or regional organisation which supports and promotes standards within the activity you provide (e.g. RYA Scotland or RSPB)?

- Yes
- No

If yes, please list

Jobs and turnover

13. How many staff does your business employ?

Full time (all year)	<input type="text"/>
Full time (seasonal)	<input type="text"/>
Part time (all year)	<input type="text"/>
Part time (seasonal)	<input type="text"/>
Volunteers	<input type="text"/>

14. How easy or difficult is it to find staff with the skills necessary to support your business?

	Easy	Fairly easy	Quite difficult	Very difficult	Not applicable
Technical skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing and PR	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

(please specify other)

15. What are your biggest challenges in recruitment, and how have you resolved them?

16. What is the approximate turnover of your business?

Annual turnover BANDED

17. Do you expect your business to grow over the next five years?

- Significant growth (> 25%)
- Some growth (5 to 25%)
- Little change (+/- 5%)
- Some decrease (5 to 25%)
- Significant decrease (> 25%)
- Don't know

Why do you think your business will grow or shrink?

Other coastal or marine businesses

Please tell us about other local businesses which your clients typically use when using services provided by your organisation

18. Do your customers tend to use any other local businesses as part of their activity?

	Always	Frequently	Occasionally	Rarely	Never	Don't know
Accommodation (hotels, B+B's, self-catering)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accommodation (hostels, bunkhouses, campsites, on board a boat)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cafes, pubs and restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local shops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visitor centres and museums	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Specialist shops or suppliers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Harbour, mooring, marina or slipway operators	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

Thank you

Thank you for completing the questionnaire.

The information you've provided will help improve the way we plan for tourism and recreation around the Scottish coastline.

If you also take part in coastal and marine recreation we would encourage you to complete the activity questionnaire:
www.marinerecreationandtourism.scot