A Tool for building an Observatory
of the Marine Leisure Sector in the Atlantic Area
NEA2 project action 3.2.2

Contents

1. Introduction and objectives of the observatory tool

The aim of the observatory tool is to produce an easily geographically compatible guide to the research and compilation of inventories which provide a snapshot of the current marine leisure sector offer, employment and training situation for a particular defined area, usually a region. Together, these statistically compatible inventories can then be compiled to create an Atlantic Area 'observatory' of the marine leisure sector. The observatory can be used to compare each region's position in relation to other similar Atlantic Area maritime regions, developments over time and the potential impact of the marine leisure sector in the Atlantic Area. The long term aim of the observatory is to provide comparable information that can be used to inform policy decisions on the sector.
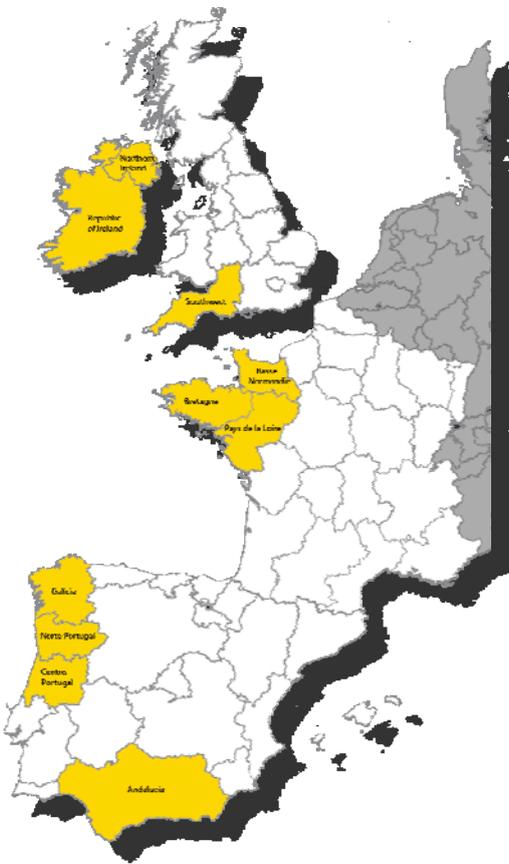
The partner regions of the NEA2 project.

A 'nautical' observatory has been operational in Brittany for 20 years and is used in that region as an important policy and funding influencing tool, resulting in strong public sector support for the watersports sector in the region.

Using the Brittany observatory as a reference point, the NEA2 partners agreed a set of 13 research questions for the new Atlantic Area Observatory*.*

As a trial, a group of partners agreed to research the marine leisure sector in their individual region or sub-region using the 13 criteria agreed for the year January to December 2009, and to return their findings for collation into an overall Observatory document for the Atlantic maritime regions taking part in the trial. The process and results of the trial have informed the development of the Atlantic Area Marine Sector Observatory Tool.

This document is a tool that describes what and how to gather the information needed and how to use and disseminate the information for best effect. The tool is designed to be a fixed set of criteria to be measured in a fixed timescale (January to December of the chosen year), but with a flexible methodology to suit a range of different situations in the regions.

Once approved by the partners in the NEA2 project, it will be produced in the four main languages of the Atlantic Area: English, French, Spanish, and Portuguese.

2. Glossary of terms and description of criteria

A - Glossary of terms

Marine sector: an economic grouping including 3 complementary and interdependent activities:
- Supervised marine leisure activities
- Marina operations
- Industry, trade and services for the marine leisure sector

Marine leisure: includes
- All watersports using craft or equipment in or on inland or coastal waters; practised for leisure, learning, sport or tourism.
- All associated economic activity.

Watersport activities: any activity in or on the water (sea or inland). The (inexhaustible) list could include: surfing, sailing, kite surfing, fishing/angling, jet skiing, canoeing, kayaking, sail kart, windsurfing, water skiing, wakeboarding, paddle boarding, stand up paddling, skim boarding, surf life saving, body boarding, gig rowing, snorkelling, rafting, fin swimming, etc.

Marine Leisure Inventory: a study of the local marine leisure sector in a defined region.

Marine Leisure Observatory: a collection of regional inventories of marine leisure sector, giving an accurate, extensive and comparable view of the sector in the Atlantic Area.

Surveyor: Someone who conducts a statistical survey.

Structures: This term is used specifically to describe any marine leisure organisation, business, club, centre, supplier, etc.

Criteria: the 13 criteria form the base of the information gathered by the observatory. Each partner region collecting data for the observatory must gather at least the information requested by these 13 criteria (all defined below).

Direct Jobs - FTE (Full Time Equivalent): a whole number or fraction applied to an employee's hours worked in order to arrive at a comparable figure for the number of full-time 'equivalent' employees in an organisation. E.g. An employee working full-time hours throughout a year is equal to 1 Full Time Equivalent Employee, or 1.0 FTE. An employee that works full-time hours for just half of the year (6 months) or that works half time throughout a year is equal to 0.5 FTE.

This should be coupled with the normal number of annual working hours for workers in a region. For example, in the UK, a normal working week is 37 hours (7.4 hours per day), Over 52 weeks in a year, there are 1,716.8 possible weekday working days (52 weeks x 5 working days per week = 260

working days. Minus 8 statutory 'Bank' holidays and an average of 20 annual leave days per year = 232 working days = 1,716.8 hours per year. Annual leave allocations do vary between companies so this is a rough estimate.

Managed: Under the control of a responsible individual or individuals answerable to those that own and/or use the facility being managed.

Supervised séance:
- Marine leisure activity supervised for a group or an individual.
- Happening continuously during 1 to 4 hours
- Led by an instructor or a coach accredited by a national authority
- Could be a lesson or simply supervised practice (when renting material for example)
Example:
- An outing on the water for 5 people (sailing initiation), for 3 hours, supervised by an accredited coach is 1 supervised séance.
- Rent of a sail kart, for 1 person for 1 hour = 1 supervised séance
- A (continuous) 2 day cruise = 5 supervised séances (3 séances for day 1 and including the night, + 2 séances for day 2)

Supervised session: total number of supervised séances
- Composed of one or several supervised séances
- Lesson or supervised practice (could be for example when renting equipment)
- Organised for a group or an individual taking part
- 1 coach = 1 session / 2 coaches = 2 sessions
- Can happen on an ad hoc basis (1 séance) or longer tem: 1 day (2 séances), 1 week (for example 5 séances), a month, a year etc.
- Led by an instructor or a coach accredited by a national authority
Example:
- A lesson of kite surfing for a group over 5 half days from Monday to Wednesday = 1 supervised session
- 10 one-to-one lessons of 1 hour = 1 supervised session

Participant: anybody participating in a supervised session (individual or group session). This is one of the 13 criteria of the observatory.
N.B. 1 person who participates in several supervised sessions will be counted several times (as many as the number of session they take part into).
Example:
- One person participating in 3 sessions a year (a lesson of kayak over a week, a 3 hours surf rental and a 15 day cruise in the Irish sea) = 3 participants.

Session per person: the 'séance/person' is the basic unity to measure the importance of a supervised practice. This is one of the 13 criteria of the observatory.
- This is the participation of 1 person to 1 supervised séance (continuous marine leisure activity of 1 to 4 hours)
- Lesson or supervised practice

- Can be a group or individual lesson or during a session with rented material
- Led by an instructor or a coach accredited by a national authority
Example:
- 1 person renting a kayak in a club for 12 outings of 2 hours each = 12 'séance/person' (1 person x 12 séances)
- 6 people go for a session made of 10 séances over 3 month = 60 'séance/person' (6 people x 10 séances)
- 6 people do a coastal cruise training of 5 continuous days = 60 'séance/person' (6 person x 2 séances per day x 5 days).

Turnover: Total value of sales for a business for a particular period. This is one of the 13 criteria for the observatory.

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B - The 13 criteria to measure/collect

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13 criteria have been identified and agreed by NEA2 project partners to produce an observatory of the marine leisure sector in the Atlantic Area. These 13 criteria are divided into 3 main categories:

1- Supervised watersports activity
2- Marinas (including marine leisure ports and moorings)
3- Marine leisure industries, trades and services

Each criterion describes: 1. an objective; 2. a short definition; 3. simple indicators to ensure the method is consistent. The objective is to enable each surveyor to understand this tool and get meaningful results based on the same clear parameters.

For all these questions, we refer to a period of time of 1 year. The questionnaire will then cover 12 months of data for each of the following questions.

1 – Supervised watersports activity

1- Number of structures
Objective: to quantify the number of structures involved in watersport activities in each region and to compare it with the other regions.

Definition: this parameter will identify all types of structures involved in watersport activities (all sizes, all legal types, watersports centers, sailing schools, etc…)

Indicators: this question could be answered in different ways.

. By legal management types. E.g. number of:

- Public structures
- Private structures
- Third/voluntary sector structures

. By sport. E.g. number of:
- Structures involved in surfing
- Structures involved in sailing
- Structures involved in kayaking
- Structures involved in multi-sports
- etc…

. By size. E.g. number of:
- Structures with more than 5 FTE employees
- Structures offering more than 500 sessions a year for example

. By revenue/turn-over. E.g. number of:
- Structures with a turnover of more than 1 million euros a year
- Structures with a turnover of less than 500,000 euros a year etc.

2- Number of participants
Objective: identify how many people took part in marine leisure activities in each region (i.e. how many people took part in watersports?)

Definition: See glossary of terms

Indicators:
- Number of group sessions booked (and average size of group)
- Number of individual sessions booked
- Number of special events during the year (and average number of participants during these)
- Number of sessions with school (and average number of participants in each of these groups)

3- Number of séances/sessions/person
Objective: identify the global number of sessions/séances per person to get a broader view of the offer of marine leisure activities in each region.

Definition: See glossary of terms

Indicators:
- Number of séances per participants.

4- Total turnover
Objective: estimate the economic value of watersport activities in the local economy.

Definition: the turnover will be the sum of the combined turnover of the identified structures (extrapolated if using a small sample size)

Indicators: this total turnover will include all the sports quoted above and can be split into the following categories:
Turnover coming from events / training / social marine leisure / marine leisure for schools / classe de mer / leisure and sports / tourism / other.

5- Number of direct jobs (full time equivalent)
Objective: to measure numbers employed by supervised activities offered within the marine leisure sector.

Definition: all jobs involved in marine leisure supervised activities must be included in the total amount (coach, trainer, technician, centre management, reception and administrative support, etc.)

Indicators: this global number will include:
- Part-time employees
- Full-time employees
- Permanent employees
- Short and longer term seasonal employees
The results will appear as a FTE number.

2 – Marinas (marine leisure ports and moorings)

6- Number of marinas
Objective: to establish the number of ports/marinas offering mooring/dry storage space in each region.

Definition: marinas, ports or moorings which have places for leisure craft (permanent, part-time, limited stays) on pontoons, moorings, anchors, quaysides, dry storage.

Indicators: number of:
- Public marinas (if relevant to your region)
- Private marinas
- Third sector marinas
- Moorings for rent in rivers etc.

7- Number of places on pontoons (in those marinas etc. in no. 6)
Objective: identify the number of space available on pontoons in marinas within each region.

Definition: the number of pontoons/moorings available to rent / buy in each marina/mooring area identified.

Indicators: the number of:
 - Pontoon spaces available in each marina

8- Global number of places:
Objective: identify the number of spaces available in marinas (including pontoons and moorings) within each region.

Definition: sum of all types of spaces available to sailors.

Indicators:
To identify clearly what mooring/pontoon places are being counted; it may be useful to break the figures down further into:
- Pontoons (as found in preceding question)
- Quayside
- Moorings
- Dry storage
- Beaches
- Other (to be specified)

9- Total turnover
Objective: identify and raise awareness of the economic value of marinas and moorings in the local economy.

Definition: The turnover is the sum of all the turnover of the identified ports, marinas, moorings etc. identified in no. 6, but not the businesses associated with them as this is part of criterion 11 below.

Indicators: total income generated by a marina including:
- Mooring rentals
- Seasonal and annual use of facilities (showers, etc.)
- Events (festivals, parties, etc.)
- Participation in watersport activities (individual and group sessions)

10- Number of direct jobs (full-time equivalent)
Objective: Identify the numbers employed in marinas.

Definition: All jobs related to marinas/moorings (technicians, cleaners, reception and admin, management, coaching, etc.) including all seasonal, temporary, part and full time employees within the identified time period.

Indicators: could include:

. Type of employment, e.g. number of:
- Part time employees
- Full time employees

- Long term employees
- Short and long term seasonal employees

The results will appear as a FTE number.

. Type of work, e.g. number of:
- Admin employees
- Management employees
- Coaches, trainers etc.
- Technical employees
- Other

3 – Industries, trades and services

11- Number of businesses

Objective: Identify the importance of the marine leisure sector in each region by highlighting the number of businesses in that region.

Definition: This figure will include all types and sizes of businesses involved in the marine leisure sector.

Indicators: percentage and number of structures involved in:
Commerce/sales
Building/manufacture
Provision of services (repairs etc.) Note that rentals, watersport tuition etc. are already covered in criterion no. 4 – Supervised watersport activity.

12- Total turnover

Objective: Raise awareness of the economic value of marine leisure industries, trades and services in the local economy.

Definition: The turnover will be the sum of all the turnover of the identified businesses, trades and services.

Indicators: Total turnover of all businesses in a region within the specified time period (extrapolation methods from the sample will have to be used to arrive at this figure).

13- Number of jobs (full-time equivalent)

Objective: Identify the level of employment in businesses within the marine leisure in each region.

Definition: Sum of all jobs in businesses identified (technical staff, admin support, management, etc.) including all seasonal, temporary and full time employees over a year.

Indicators: could be presented as:

. Type of employment, e.g. number of:
- Part time employees
- Full time employees
- Long term employees
- Short and long term seasonal employees

The results will appear as a FTE number.

. Type of work, e.g. number of:
- Admin employees
- Management employees
- Educational employees (coach, teacher, etc…)
- Technical employees
- Other

. Type of work:
- Technical
- Management
- Admin
- Etc.

3. Adopting suitable survey technique(s)

Adopting a survey technique that suits the region being surveyed is a crucial first step to achieving a well-researched and significantly accurate inventory/observatory. Whilst it is important to ensure that each region is measuring the same 13 criteria, the methods by which they achieve this will vary. The following section offers some techniques that have worked in previous surveys.

1. Desk research.

Before conducting a survey, initial desk research should be undertaken in order to provide as close to a total number of marine leisure businesses in the chosen region as possible, and a list of contacts for each business.

The use of national or international business information databases can help to get a reasonably accurate total number of businesses in the marine leisure sector in your region. (See Resources for desk research in Annex b) The global MINT database offers extensive information on businesses. Access to detailed information is through subscription. Researchers have to identify the correct 'ISIC' code (International Standard Industrial Classification of economic activities) to get the right information for the sector[1]. A significant amount of time needs to be spent 'sifting' through the results to remove any irrelevant businesses or organisations.

Local, regional and national databases are also available in most countries. Some marine leisure associations/clusters in the regions already have this information so the desk research is relatively simple. In the case of Cornwall, the local marine network had some information which had to be supplemented by further research through MINT and Business Link – a regional business support organisation.

2. Sampling.

Once a total, or near-total list of businesses is obtained from initial desk research, if the surveyor has the resources, 100% of the sample can be surveyed. If there are limited resources, the surveyor can apply random sampling techniques to each of the three areas of criteria planned for measurement (3 questionnaires):

• Providers of supervised watersports activity
• Marinas (including marine leisure ports and moorings)
• Marine Leisure businesses, trades and services

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[1] For more information on ISICs : http://www.statistics.gov.uk/methods_quality/sic/default.asp

Each sample must be representative i.e. minimum 10% of the total organisations relevant to the area being measured by each of the 3 questionnaires. For example, if your region has 400 businesses/water sports, clubs/schools, marinas/pleasure boating ports etc. then your sample size (this is the actual results, not the number of organisations surveyed) should be no smaller than 40 organisations.

To be representative a sample must include the full range of types of organisations in the sector; the surveyor should ensure that the organisations/people included in the sample represent the whole group. Do not only include large scale organisations, but also ensure small to medium and micro-enterprises are represented, include all types of operation; private commercial, public and voluntary, clubs and centres, etc. The sample should mirror the diversity of organisations in your targeted group.

Once the sample surveys have been collected (see methods suggested below) a pro-rata extrapolation method can be used to arrive at the total figure for the region. This would take the results of the data gathered and apply it to the global number of structures identified in the region. For example, if 10% of the total businesses were surveyed, then multiply by 10 to achieve an estimate of the marine leisure sector in the region.

Sample sizes of under 10% of the total number of organisations operating in a region are not significantly representative and will therefore be invalid.

3. **Primary data collection techniques.**

The sample survey information can be gathered in various ways according to the relationship and experience you have with the organisations etc. being assessed (examples of questionnaires used for the recent observatory can be found in annex a):

Methods	Advantages	Weaknesses	Comment
Written questionnaire (post)	Easy and quick to put in place.	The response rate is usually very low. Might need to follow up and chase respondents. Impersonal method. More expensive and longer than Internet version.	To use if your targets don't have regular access to email or the Internet.
Written questionnaire (e-mail / survey monkey)	Easy, cheap and quick way to disseminate and collate the results of a survey. http://www.surveymonkey.com/	The response rate is usually very low. Might need to follow up and chase respondents. Impersonal method.	Probably the best first step to gather the data required.
Telephone questionnaire	More involvement / open discussion / deeper understanding. A 1 to 1 might enable more	Time-consuming and expensive.	Could be an interesting and efficient way to proceed as a first approach if you have a

	freedom for some partners to express themselves. Good for filling in missing information.		small number of targeted people/organisations.
1 to 1 meeting	More involvement / open discussion / deeper understanding. A 1 to 1 might enable more freedom for some partners to add further information.	Time consuming and expensive.	To use if key partners in a region are willing to express a deeper view. Should be used as a second step in the research after receiving some replies and having identified key issues that needs to be clarified.
Focus group	Deeper involvement and open discussion that will enable the survey to go deeper in understanding the sector's point of view on some issues (if required)	Time consuming and expensive.	To use as a way to make more sense of the first answers from questionnaires (as a second step, not primary research).

Disclaimer on accuracy of results.
Note that the methods suggested above can only produce estimates of the true situation in each region.   The methods used will vary in each region.

4. How to use the inventories/observatory

Local inventories

Broadcasting the results of the inventories will be an important step towards the recognition of marine leisure as a key economic stakeholder for our regions. Therefore the data must be:

- Shared with the NEA 2 partners (by uploading to the NEA 2 website / presenting and discussing at partner meetings / presenting in reports, etc.)
- Shared with local regional and national partners and stakeholders involved in marine leisure (third sector, public, private companies, professional groups and industry clusters).
- Should be presented in an easily understandable format for the public:
    . There is no specific guidance on how to present the findings, each region can format the results in a way that suits their audience, as long as all the information addresses the 13 criteria but:
    . Avoid acronyms and jargon
    . Use plain English / French / Spanish / Portuguese
    . Be inclusive, making allowance for different visual/cognitive requirements
    . Use good professional graphic presentation
    . Use a range of graphical and text information (graphs, charts, tables as well as explanations)
- Must be disseminated to key audiences (websites, marinas, shows, tourism centres, events, etc.). Appropriate audiences could include: marine leisure businesses, customers, tourists, local population and local and regional authorities.
- Should be available in different formats: printable web version on key websites, brochure, PowerPoint, etc.
- Once the data is gathered, each region publicizes their results by targeting key media (internal newsletter, specialist and / or local newspapers, etc.).

Final Atlantic Area Observatory

Ideally, this should be produced by each region every two years. Disseminating the transnational observatory (the combined inventories of the Atlantic Area) is an important action of the NEA2 project. Therefore collating the final observatory is critical and should be disseminated to the highest levels of strategic decision-making: national and European. This final document could be used as a promotional/policy tool but also as an educational tool to raise awareness about the importance and value of marine leisure. There is also potential for the findings to be used as a tool for developing tourism.

5. Annexes

A - Examples of questionnaires

These are sample questionnaires which can be used as they are or adapted providing the results capture the essential 13 criteria.

EXAMPLE COVERING LETTER

Regional inventory of the marine leisure sector of [*insert region or area*]

[Insert organisation collecting the information] is producing a regional inventory of the marine leisure sector in *[insert relevant region].* This will measure all activity related to marine leisure and the businesses and services which support it. It will also measure the economic value of the sector to the region. This inventory will be used to influence public support and funding for the sector in the future. It will also go towards production of an Atlantic Area 'Observatory' which will compare the marine leisure inventories of each region and provide an important European policy influencing tool.

We are very grateful for a few minutes of your time to answer a these questions on the performance of your organisation/business between *[January and December 2009].*

Since this is the first inventory, you may not have all the information, but we ask you to give your best guess this time. However, we encourage you to consider collecting such details so that when we request your help again in a year's time, you will not only be able to give your answers more easily, but also be able to compare your own performance with the statistics collated for *[insert region]* as well as those collated for all regions and sub-regions along the west Atlantic coast of Europe involved in this project.

We will not share your individual business data with any third party. These details will be combined with all other responses and will not appear in isolation or be associated with your particular organisation.

Contact number for any help you may need to assist in filling in this questionnaire: *[insert relevant phone number]*

We thank you in advance for your input.

[Insert name and position of person sending this letter].

Questionnaire 1- Supervised watersports activity

1. Name of business/structure

_____

2. Address

_____

City/Town: _____ Post Code: _____

Website: _____

Telephone: _____

3. In [*insert year*], how many participants took up 1 or several supervised session(s) delivered by you or your business?

(To count participants, please refer to the glossary above – 1 participant doing 2 sessions = 2 participants).

Month	Number of participants
Jan	
Feb	
Mar	
Apr	
May	
Jun	
Jul	
Aug	
Sep	
Oct	
Nov	
Dec	

4. Number of 'séance-person' in [*insert region*], in [*insert year*]?

Month	Number of half days 'tuition sessions'
Jan	
Feb	
Mar	
Apr	
May	
Jun	
Jul	
Aug	
Sep	
Oct	
Nov	
Dec	

5. What was the turnover for your business/structure generated in [*insert year*]?

□ £0 - £4,999   □ £5,000 – £9,999   □ £10,000 - £19,999   □ £20,000 - £29,999

□ £30,000 - £39,999   □ £40,000 - £49,999   □ £50,000 - £75,000   □ £75,000 – £99,999

□ £100,000 - £149,999   □ £500,000 + please specify approximate figure: _____

□ Please specify if more than £1/2m: _____

6. How many Full Time Equivalent (FTE) employees, in total (including yourself if you also provided direct tuition) did your organisation employ solely to deliver supervised sessions in [*insert year*]? _____

(To count FTEs, please refer to the glossary above)

Questionnaire 2- Marinas and moorings

1. Name of the port/marina/group of moorings that you represent.

_____

2. Address:

_____

City/Town: _____   Post Code: _____

Website: _____

Telephone: _____

3. In [*insert year*], what was the maximum number of places (long term and short term) possible in your marina/harbour/moorings on each of the following types of facilities:

On pontoons: _____

On quayside/harbour-side: _____

On mooring buoys: _____

On beach(es): _____

Other: _____

Total places: _____

4. What was the turnover for your business generated in [*insert year*]?

□ £0 - £4,999   □ £5,000 – £9,999   □ £10,000 - £19,999   □ £20,000 - £29,999

□ £30,000 - £39,999   □ £40,000 - £49,999   □ £50,000 - £75,000   □ £75,000 – £99,999

□ £100,000 - £149,999   □ £500,000 + please specify approximate figure: _____

□ Please specify if more than £1/2m: _____

5. How many Full Time Equivalent (FTE) employees, in total (including yourself if you assisted) did your organisation employ solely to deliver a hosted and welcoming marina/port in [*insert year*]? _____

(To count FTEs, please refer to the glossary above)

Questionnaire 3- Marine Leisure industry, trades and services

1. Business name

_____

2. Business address

_____

City/Town: _____ Post Code: _____

Website: _____

Telephone: _____

3. What was the turnover for your business generated in [*insert year*]?

□ £0 - £4,999   □ £5,000 – £9,999   □ £10,000 - £19,999   □ £20,000 - £29,999

□ £30,000 - £39,999   □ £40,000 - £49,999   □ £50,000 - £75,000   □ £75,000 – £99,999

□ £100,000 - £149,999   □ £500,000 + please specify approximate figure: _____

□ Please specify if more than £1/2m: _____

4. How many Full Time Equivalent (FTE) employees in total did your organisation employ in [*insert year*]? _____

(To count FTEs, please refer to the glossary above)

In order to carry out initial desk research and to make the best use of these observatories, the following is a list of other existing sources of data available.

Global:

MINT business information database. Contains extensive business information searched by SIC codes (Standard Industry Classification Code)

http://mintbusinessinfo.com/version-20101129/portal.serv?product=mintportal

France:

NEF

http://www.nautisme-finistere.com/

NEB

http://www.nautismebretagne.fr/

Bretagne info nautisme

http://www.bretagne-info-nautisme.fr/

Fédération des industries nautiques

http://www.france-nautic.com/frameset.asp?langue=fr

Nautisme en Pays de la Loire

http://www.nautisme.enpaysdelaloire.com/

F2N - La Manche

http://www.f2n.fr/

England

Business Link

www.businesslink.gov.uk/bdotg/action/home

Companies House

http://www.companieshouse.gov.uk

British Marine Federation

http://www.britishmarine.co.uk/

Ports Authority

Lists all ports, harbours, jetties and piers in the UK

http://ports.org.uk/allareas.asp

Individual sport federations e.g. RYA,

http://www.rya.org.uk/infoadvice/Pages/default.aspx

Cornwall Marine Network

http://www.cornwallmarine.net/

North Devon watersports

http://www.northdevonplus.com/north-devon-watersports-project.asp

Portugal:

INTERCÉLTICA - Projecto Náutica - Região Norte

www.projectonautica.com