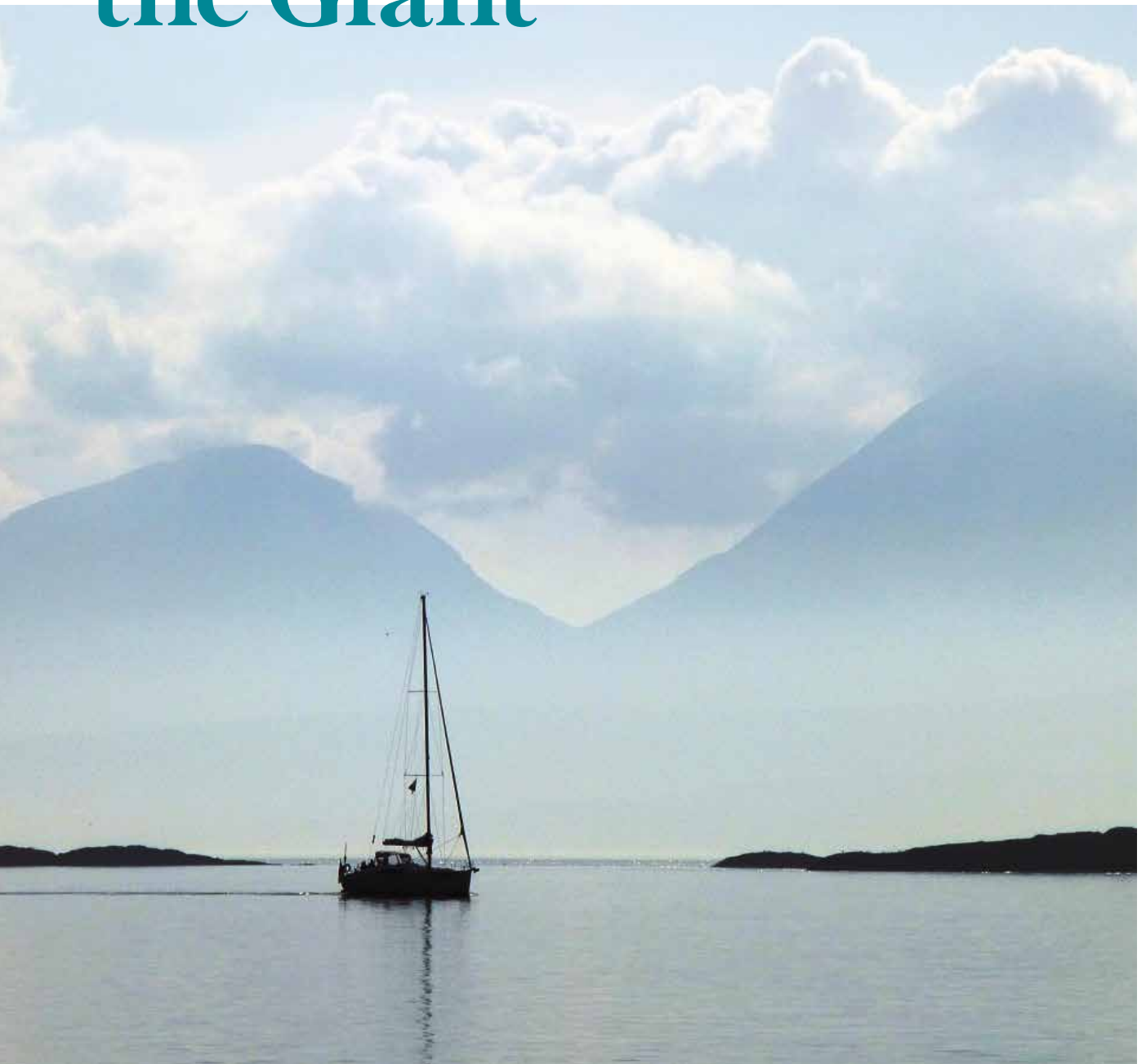


A Strategic Framework
for Scotland's Marine
Tourism Sector

Awakening the Giant



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Our Vision

By 2020 we want Scotland to be “A marine tourism destination of first choice for high quality, value for money and memorable customer experience delivered by skilled and passionate people”

Our Mission

To develop and lead the growth of sailing tourism in Scotland from £101m of visitor expenditure to £145m by 2020, and to increase the overall economic value of the marine tourism sector from £360m to over £450m by 2020

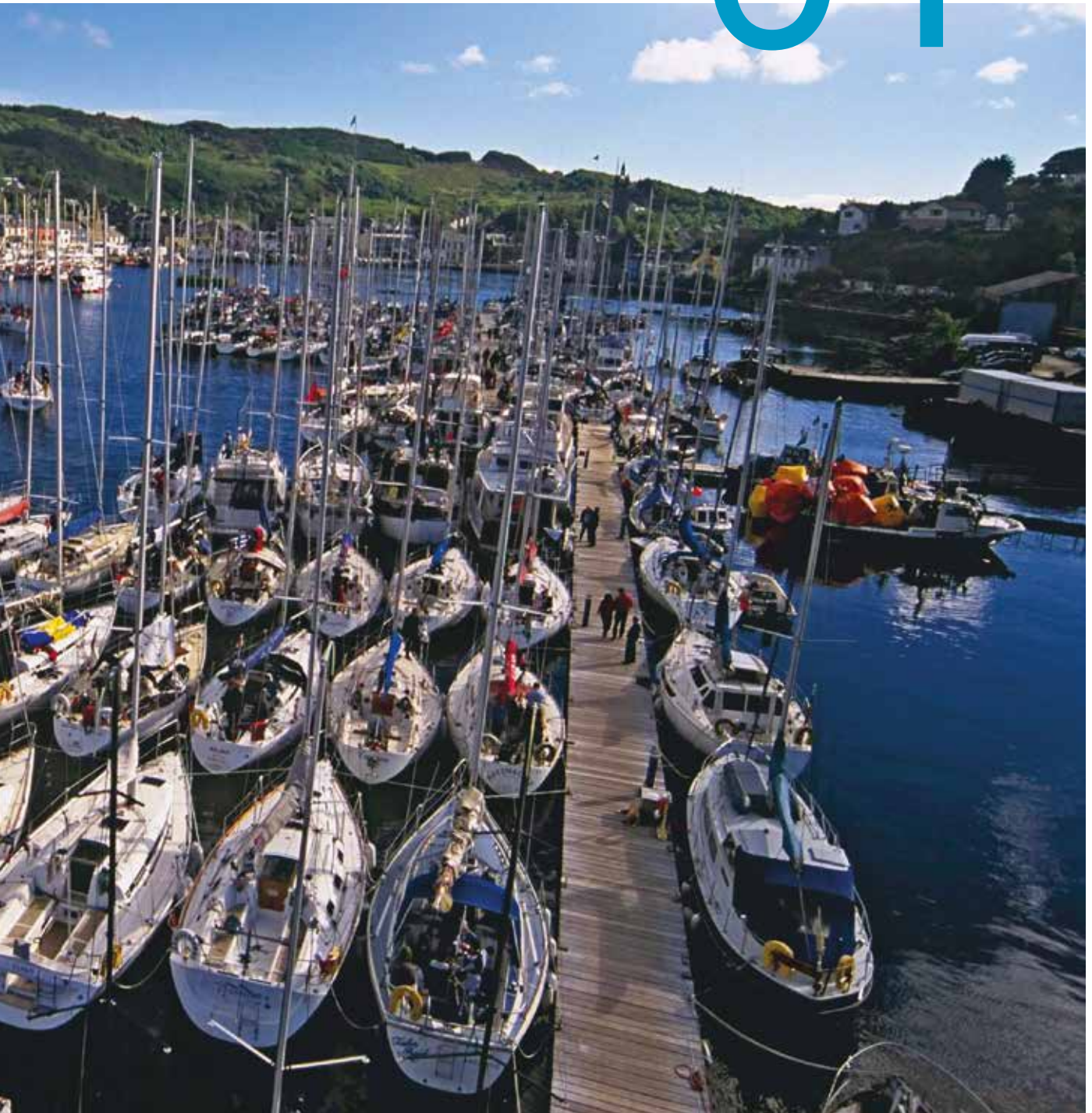
We shall deliver our vision and mission by focusing on three core themes:

- 01 Providing Authentic Experiences**
- 02 Improving the Customer Journey**
- 03 Building Our Capabilities**

Introduction



01



We want Scotland to be recognised as a marine tourism destination of first choice for high quality, value for money and memorable customer experience delivered by skilled and passionate people.





1. Sailing Tourism in Scotland,
Scottish Enterprise report
February 2010.

The Strategic Framework for Scotland's Marine Tourism Sector is led by a working group of marine tourism industry leaders and user groups supported by the public agencies and enterprise bodies. The Framework is focused on the sustainable growth of Scotland's marine tourism sector, and seeks to develop and grow marine tourism in line with the ambitions and targets of the national tourism strategy – Tourism Scotland 2020. Through the growth in the number, length of stay and value of marine tourists, we shall maximise the economic benefits of marine tourism for Scotland as a whole, and for the marine industry and businesses, communities and organisations who collectively make up Scotland's marine tourism sector.

We want Scotland to be recognised as a marine tourism destination of first choice for high quality, value for money and memorable customer experience delivered by skilled and passionate people.

Scotland's marine environment is one of its crown jewels and encompasses some of the world's most beautiful and varied boating waters and marine wildlife, scenery and heritage. Whether our visitors seek adventure, wildlife, family boating experiences or a variety of water sports activities, day or extended visits, on our coastal, offshore or inland waters, Scotland's marine offer is complete, varied and of the highest standard.

Marine tourism is one of Scottish tourism's sleeping giants with sailing and boating alone already generating over £101m of visitor expenditure and directly supporting the employment of almost 2,730 jobs¹. A recent BMF study in 2014 into the economic value of marine tourism indicated the sector in Scotland is valued at £360m. With coordination and effort at every level we can build our sector into the giant it can be.

The marine sector has developed, with little formal coordination or strategic input, to become a leading and valuable tourism sector. Our belief is we must continue to be ambitious in our plans and goals for the future. The development of this Strategic Framework has involved wide consultation with all the different bodies and constituent groups who together represent and contribute to Scotland's marine tourism offering, and we would express our thanks to all the individuals, businesses and communities whose input has helped shape this Strategic Framework.

Awakening the Giant: A Strategic Framework for Scotland's Marine Tourism Sector sets out the ambition for the sector to 2020 and identifies a clear path forward. A detailed Action Plan will accompany the Framework with achievable step by step actions, and setting out the roles and responsibilities of the different bodies involved, and when and how the key actions will be delivered.

To realise this potential we shall work in strong partnership across the industry and public sector, and through the clubs, associations, communities and businesses involved in marine tourism. We shall coordinate our activity and the support available from partners, government and public agencies, and seek to access appropriate EU, UK and Scottish Government funding streams to support the sector's growth.

Simon Limb	Tony Gorzkowski	Gavin McDonagh
Chairman	Chairman	Chairman
BMF Scotland	RYA Scotland	Sail Scotland

With thanks to Highlands & Islands Enterprise for the funding and support to allow this Strategic Framework to be developed, and with the additional support and on-going commitment from: The Crown Estate, EventScotland, Firth of Clyde Forum, Scottish Canals, Scottish Development International, Scottish Enterprise, and VisitScotland.





What is Marine Tourism?

Marine tourism means many things to many people and yet for any Strategic Framework to succeed it must have a clear, communicable and unambiguous definition to build upon.

Marine Tourism includes those recreational activities which involve travel away from one's place of residence and have the marine environment or inland waters/waterways as their host or focus.

It is important to note that this definition includes both tourists (overnight) and visitors (day trip).

As a consequence a parallel definition for coastal tourism also emerges, where coastal is described as the land that abuts the above definition of marine tourism; and a key element of the Strategic Framework will be to ensure and maximise the linkages with coastal tourism to maximise the visitor offering and experience, and the economic impact of marine tourism.

Coastal Tourism includes those recreational activities which involve travel away from one's place of residence which have the land that abuts the marine environment or inland waters as their host or focus.

Some parts of the marine tourism sector such as cruising are already well established with their own industry groups or strategies. Other established sectors such as sailing and boating (shown as core sectors in table) currently have no strategic framework, however they are central to the marine tourism sector through their significant contribution and future potential to the tourism economy, as well as sustaining jobs and facilities particularly in rural areas and communities.

The Strategic Framework seeks to maximise the opportunities to grow marine tourism by providing a framework under which all the different elements of the marine tourism sector can grow. For example the infrastructure and facilities provided by and for the sailing and boating sectors also benefit emerging sectors such as sea kayaking, coastal rowing, surfing and windsurfing. Our inland waterways, alongside our marine coasts, attract many visitors and also provide important corridors for the sailing and boating sector. Growing from recreational activities, a range of board and paddle sports are also beginning to emerge as key tourism products in their own right, forming part of Scotland's growing Adventure Tourism sector. The table below provide an overview of the different sectors and activities which play into a vibrant and growing marine tourism sector:

Marine Tourism

Established

- Cruising
- Sea angling
- Marine wildlife watching
- Day Boat Trips

Core

- Sailing (yacht & dingy)
- Motorboating

Emerging

- Sea kayaking
- Coastal Rowing
- Surfing
- Windsurfing

Other examples

- Canal boats
- SCUBA diving
- Water-skiing
- Kite-surfing

Coastal Tourism

Not included in this strategy

Examples

- Long distance coastal paths
- Horse-riding
- Land-yachting
- Fishing

Where are we starting from?

Marine tourism has a foot in two distinct camps; Tourism and the 'Blue' or broader marine/maritime economy and environment – although in Scotland, the marine leisure industry is unlike the wider UK Marine Industry as there is not a significant manufacturing presence, and its revenue is almost entirely from marine tourism.

The Strategic Framework and Action Plan will also ensure clear linkages are established to the national and regional Marine Planning Frameworks and Partnerships to enable the marine tourism sector's views and interests to be fully represented, and also to ensure the Strategic Framework is aligned to the wider economic, environmental and sustainable development objectives of Scotland's Marine Planning. The Framework will ensure that a growing marine tourism industry continues to contribute and play its role in the achievement of a healthy marine environment, and operates within its environmental limits.

As mentioned above, some marine tourism sectors have already established a strategic approach to their development whilst other marine and water based activity adventure sectors are fast emerging and, mindful of the importance of a joined-up approach, this Strategic Framework will seek to align with the different sector plans already in place and set within the overall context of the national tourism strategy, Tourism Scotland 2020.

When looking across marine tourism, it was agreed that the focus of initial actions should be the sailing and boating sector, therefore this Framework focuses on this sector where an agreed and understood economic baseline is in place. The intention of the Strategy going forward is to better capture the full economic impact and potential of the associated and emerging sectors of marine tourism, and ensure a full alignment and active engagement with bodies such as Wild Scotland, the wider adventure tourism industry and important tourism venues such as the Scottish Seabird Centre, all of which contribute to the overall marine tourism proposition and contribution for Scotland.

However the initial focus on the sailing and boating sector is appropriate given:

- 01 The sailing and boating sector is of significant size with considerable potential for growth and to make a tangible difference to the value of marine tourism in Scotland: with potential visitor expenditure growth from £101m in 2010 to £145m in 2020².
- 02 Industry groups alone would be unable to realise this ambition, therefore a partnership approach is necessary.
- 03 Establishing a stronger sailing and boating sector will have tangible benefits to the growth and development of the other emerging marine and water sports activities.

Sailing and boating tourism also by its very nature reaches communities and parts of the coast that are 'off the beaten track'. Many of these communities have fragile economies and the impact that marine tourism makes is critical. It is estimated that by 2020 the expenditure level can be grown to over £145m³ each year, with much of this benefitting the remote and rural parts and communities of Scotland.

2 & 3 Sailing Tourism in Scotland, Scottish Enterprise report February 2010.





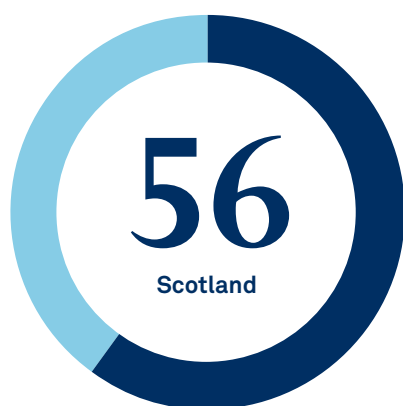
Growth Markets and Market Analysis



02



Origin of visiting boat nights (%)



Source: Survey responses in Sailing Tourism in Scotland 2010, by Tourism Resources Company in association with EKOS and British Marine Federation, commissioned by Scottish Enterprise.

As marine tourism is such a varied and rich sector, the demographics and interests of groups and individuals vary hugely according to the type of activity undertaken. For example the profile of somebody taking a day boating excursion or canal trip will naturally differ substantially from somebody who owns their own yacht and spends lengthy periods cruising the world's oceans.

Data collection is acknowledged as a key requirement of this national Strategic Framework, to underpin the agreed priorities, further refine marketing activities, and inform future direction and development.

Therefore, although the initial market analysis within this Framework represents an informed picture, it will require to be developed by future regular and repeated data collection and analysis, both in terms of the geographical markets and the type of visitor – generalist, expert, family – and the economic value and impact of each group.

Sailing tourism was analysed by Scottish Enterprise in 2010 as part of the work towards developing the Tourism Intelligence Scotland (TIS) guide, *Sailing Tourism in Scotland*. This still represents the most comprehensive, up-to-date published information on sailing tourism in Scotland.

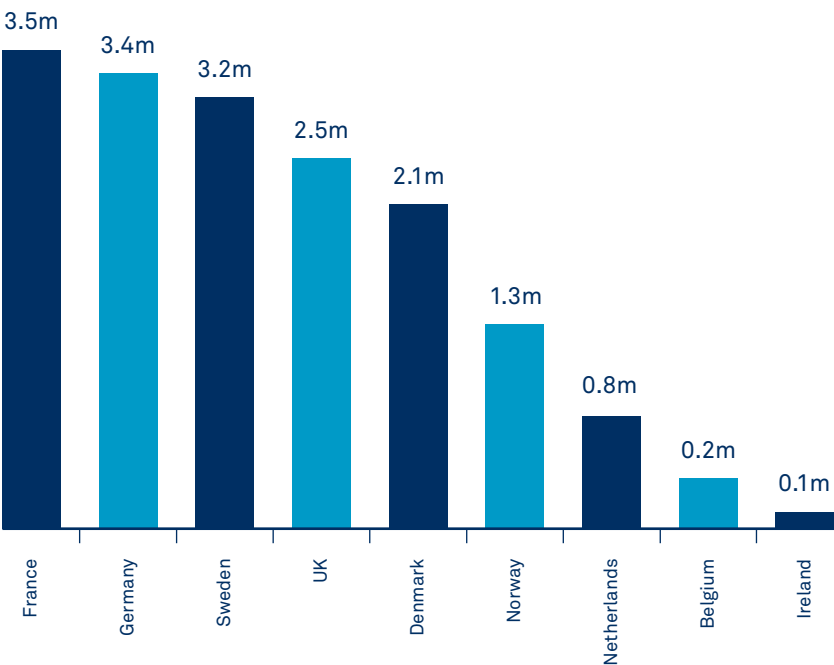
Research suggests that over 40% of visitor boat nights are made by boats from outside Scotland, many of which contribute to our remote, rural economies.

Available data and experience indicates that two main pillars will account for most of our visitor spend in 2020, just as they do now – *Home Turf* and *Near Neighbours*⁴.

This is demonstrated by figures for boating participation across the UK and Northern Europe which represent large markets of boating participants. Further analysis of these markets by TNS (2008) showed that within these markets there are 0.6 million private boaters capable of sailing to Scotland, and 1 million boaters who are interested in hiring a boat for a holiday in Scotland.

⁴ *Home Turf, Near Neighbours, Distant Cousins, and Emerging Markets are the Growth Markets referenced in the national tourism strategy – Tourism Scotland 2020.

European Boating Participation

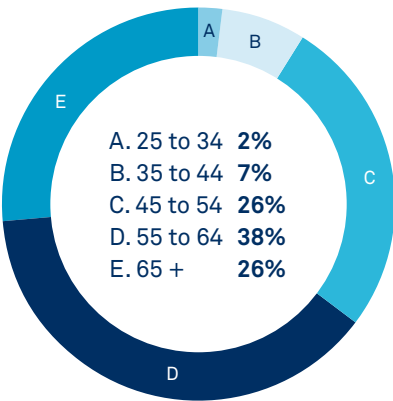


Home Turf - Scotland & England, Wales and Northern Ireland

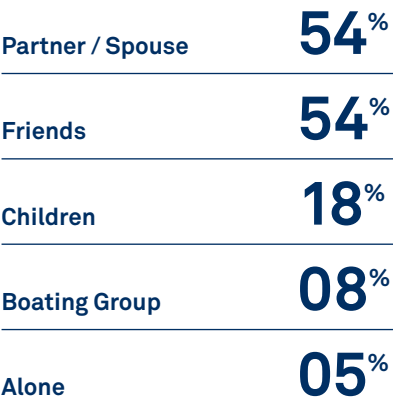
In general, sailing continues to attract affluent consumers with relatively high disposable incomes. However this can vary greatly – for example, day sailing excursions for those participating in trips such as wildlife-watching are much more accessible to the mass market.

A study of Scotland’s transit users, Boating Demand in Scotland, by TNS Travel & Tourism for British Waterways, may have been based on visitors to our canals but it gives a useful picture of the kind of people who come to Scotland to sail.

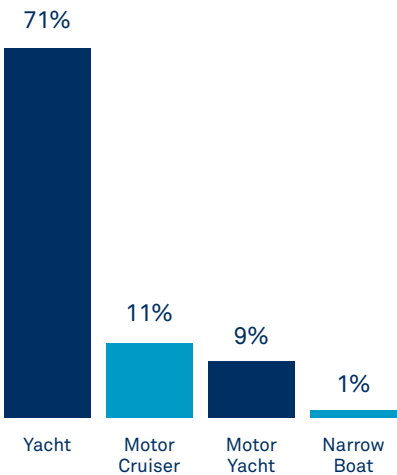
Age



Group



Boat



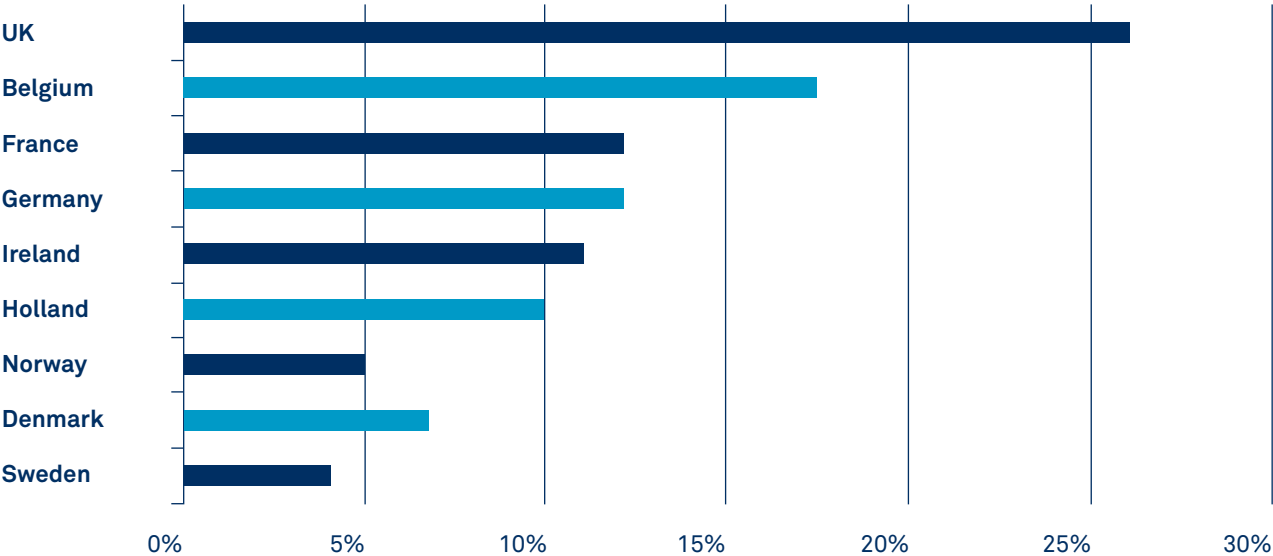
Source: TNS Travel & Tourism,
Potential Boating Demand Study, 2008

From these charts we can see that a large proportion of our sailing visitors are retired or approaching retirement, most opt for a yacht, and couples or friend groups are very popular. It has also been noted that there is a good balance of men and women (licence holders are usually male, but the distribution of yachtsmen and yachtswomen is more equal).

It will be important in targeting Home Turf that consideration is given to the marketing focus for different segments of the market. Insufficient data is available for a robust market segmentation exercise, which will require to be developed through the Strategic Framework work to focus marketing for different geographies and characteristics within the Home Turf markets, and indeed seeking to widen the age demographic of sailing.

Proportion of Visitors to Scotland by Country of Residence

Source: Produced by Tourism Intelligence Scotland (www.tourism-intelligence.co.uk) in 2010 – NB: anecdotally considered that figure for Belgium is a statistical anomaly attributable to a large cruising company in the year of research.



Near Neighbours

Germany, France, Scandinavia, Ireland and Netherlands

There is little doubt that visitors to Scotland come from all over the globe, but the Strategic Framework focuses on the following group of countries which, for various geographic, cultural and practical reasons are particularly important to Scottish sailing tourism and are expected to remain so in the future.

- Denmark
- Germany
- Ireland
- France
- Netherlands
- Norway
- Sweden

In general these overseas markets are relatively close to Scotland, both in terms of geography and practical considerations for either sailing a yacht or air routes for marine tourism visitors not sailing their own vessel as their main means of transport.

Other European markets are, and will probably continue to be, relatively small in individual worth to Scotland, but this will be kept under review over the Framework period.

Distant Cousins

USA, Australia and Canada

In contrast to the Tourism Scotland 2020 Strategy, marine tourism will not focus greatly on Distant Cousins in the USA, Australia, and Canadian markets. There are a variety of reasons for this. Due primarily to geography, sailing in Scotland is very unlikely for boat owners using their own vessels. Charter market and other marine tourism activities hold potential but the relative cost of competing with destinations such as the Mediterranean, Caribbean, Canada, and New Zealand mean that they are unlikely to yield great returns in the short term.

However it is recognised that the USA market is of particular significance to the day boat trip market and we shall recognise this within the marketing plans emerging from the Strategic Framework, as well as building an internationally competitive marine tourism destination proposition which will ensure we can compete successfully in all our key markets over time.

Emerging Markets

Brazil, Russia, India and China

In terms of emerging markets, whilst growing strongly globally in terms of general leisure tourism, they are also unlikely to deliver significant returns for Scottish marine tourism in the short to medium-term due to the challenges posed by geography and transport links. Although not considered a priority at this time, over the longer term, as their contribution to Scottish tourism grows more markedly, there may be more opportunity to engage this growing tourism segment.

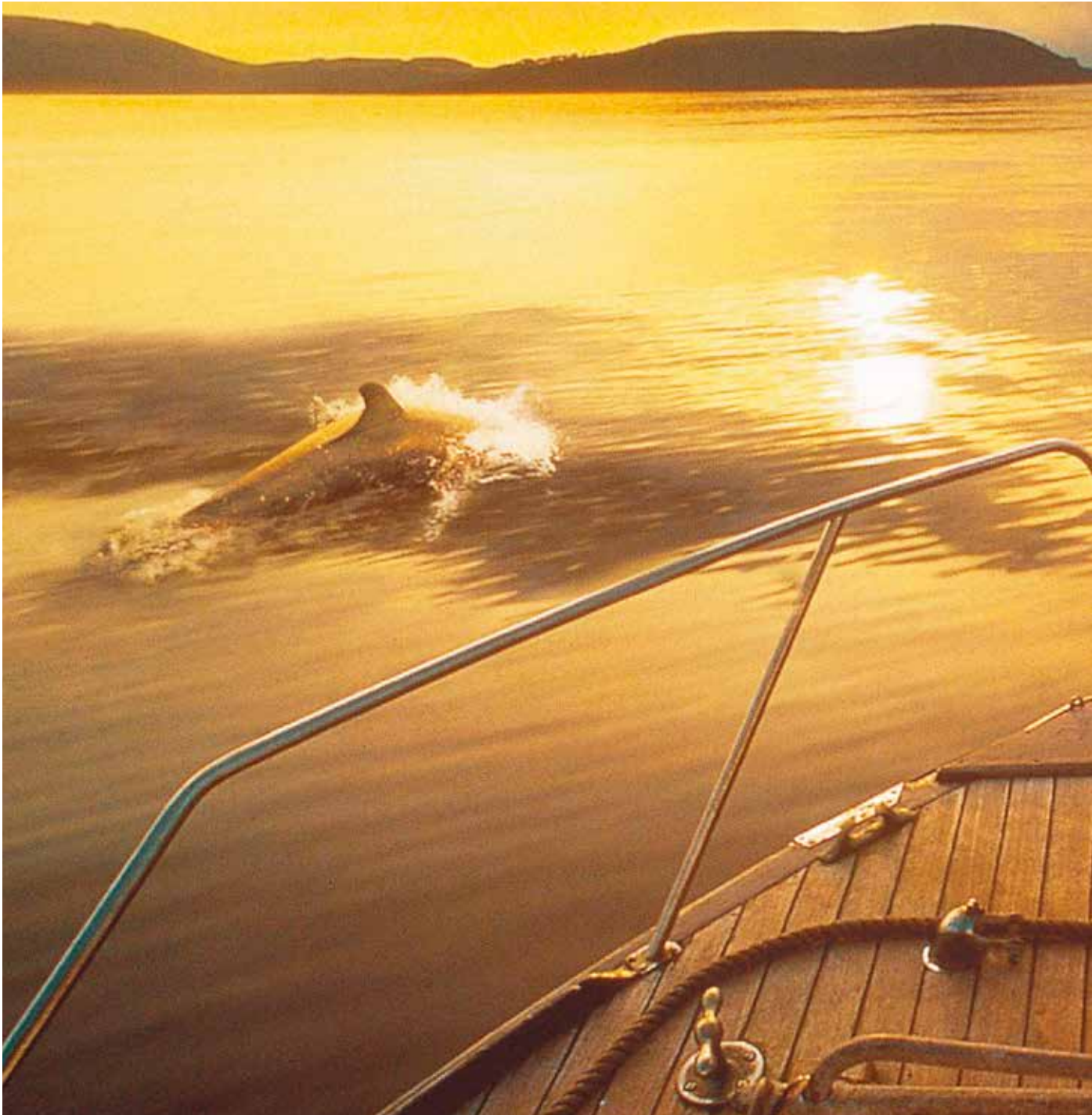
Balanced Market Portfolio

Combined, the markets outlined above add up to a strong balanced market portfolio based on the strongest market opportunities and those most likely to offer the greatest growth potential for Scotland's marine tourism sector. This Strategic Framework also provides flexibility to adjust plans and focus resources on particular markets, or change direction in the event of any significant market changes and opportunities.

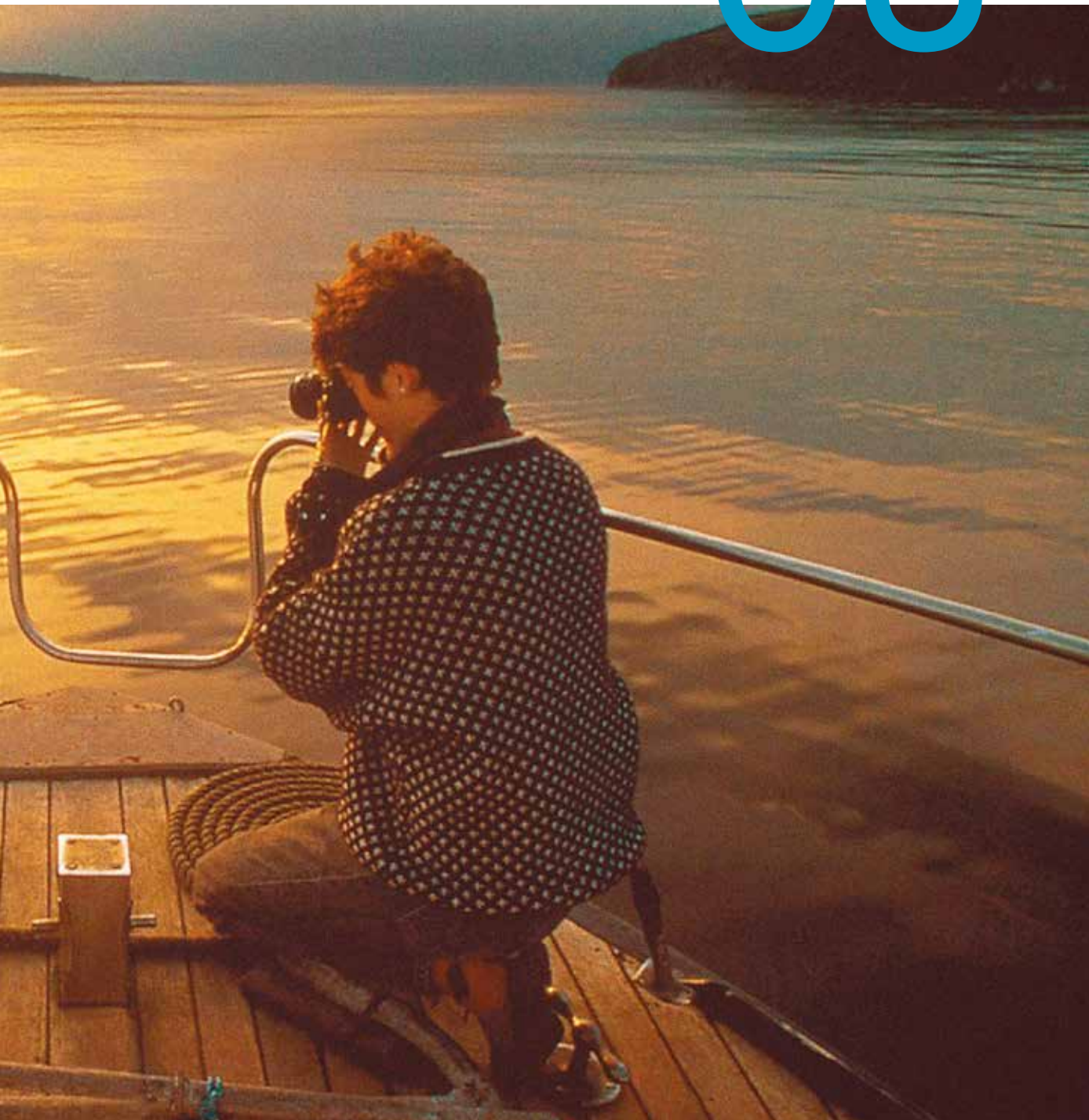
It is undoubtedly ambitious to increase marketing activity to grow these markets, with increased competition from competing destinations but through a strategic marketing approach and investment, we are confident we can grow Scotland's share of our key marine tourism markets.



The Strategic Framework for Marine Tourism



03



**By 2020
Scotland is a marine
tourism destination of first
choice for high quality, value for money
and memorable customer experience delivered
by skilled and passionate people.**

**To develop and lead the growth of sailing tourism in Scotland
from £101m of visitor expenditure to £145m by 2020,
and to increase the overall economic value of the marine
tourism sector from £360m to over £450m by 2020**

Growth Markets

Home Turf

England, Scotland, Northern Ireland, Wales

Near Neighbours

Scandinavia, Germany, France, Spain,
Ireland, Netherlands and Italy

Emerging Markets

Distant Cousins

Providing Authentic Experiences

Events and Festivals

Cruising Routes and Themed Journeys

Improving the Customer Journey

Planning and Booking

Marine Host

Digital Landscape

Building our Capabilities

Facilities and Stepping Stones

Skills

Marketing

Sustainability

Strategic Framework

Data



“By 2020 Scotland is a marine tourism destination of first choice for a high quality, value for money and memorable customer experience delivered by skilled and passionate people”

This vision is deliberately adapted from the national tourism strategy: Tourism Scotland 2020 (TS2020), and ensures that the Marine Tourism Strategic Framework aligns and complements the national approach, Scotland’s overall tourism product and works closely with the Destination Management Organisations and other key stakeholder and industry bodies who will play a crucial role in the development of the marine tourism offering.

In contributing to this vision our aim is:

To develop and lead the growth of sailing tourism in Scotland from £101m of visitor expenditure to £145m by 2020, and to increase the overall economic value of the marine tourism sector from £360m to over £450m by 2020.

This aligns with the national tourism vision and targets but specifically recognises and accepts the challenge in realising the marine tourism opportunity identified in Scottish Enterprise research (2010).

In addition, we shall measure the success of our strategy by the key indicators of:

- Visitor numbers, spend and satisfaction;
- GVA of industry;
- Percentage growth of the industry

Key Themes

The national tourism strategy, TS2020, puts the customer at the heart of the tourism experience. By providing excellent experiences which exceed the expectations of visitors, we shall ensure that Scottish tourism continues to grow and thrive. The Marine Tourism Strategic Framework has taken the TS2020 framework and adapted it for the marine tourism sector.

By aligning with TS2020, marine tourism’s contribution to the national strategy can be clearly demonstrated and the sector can play its part in addressing key issues, such as transport and access, digital connectivity and onshore facilities (accommodation, retail and food and drink), and linkages into the wider tourism offering of Scotland’s coasts and communities, history and heritage, adventure and food & drink.

Taken from TS2020, the three themes of the Strategic Framework are:

- 01 Providing Authentic Experiences
- 02 Improving the Customer Journey
- 03 Building Our Capabilities





Providing Authentic Experiences

3.0 The Strategic Framework for Marine Tourism

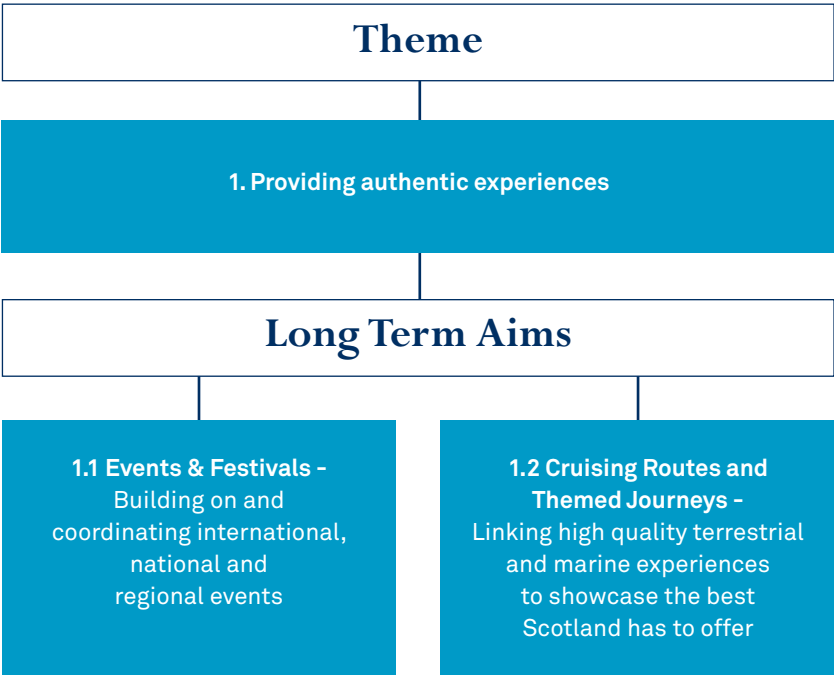


3.1



3.1 Providing Authentic Experiences

This theme will build on Scotland’s strengths, its distinct wildlife and marine environment, the range of marine tourism activities on offer to visitors, and our unique marine culture and heritage and events and festivals, and ensure that our visitors’ holidays are always enjoyable and authentic.



‘Providing Authentic Experiences’ seeks to focus and develop the product offering of the marine tourism sector. Scotland has a unique offering to the market, with a richness of marine coastal and inland waters offering a range of experiences and activities to suit the preferences of all marine tourism and leisure visitors.

To capitalise on this our industry needs to improve its links and its synergy with the wider tourism offering of Scotland, adding value to visitors’ experiences and maximising and spreading the economic impact from the sector, in particular linking strongly with our coastal communities and tourist destinations, and celebrating the rich diversity of our marine and coastal wildlife. Done well, it will act as an entry point into the riches of the Scottish tourism offer – the history and heritage, the scenery and wildlife, visitor attractions and experiences, and Scotland’s unique food and drink offering.

We must learn from and listen to our customers and respond by developing products to suit each segment of the market – recognising that many of our marine tourism visitors are independent and will plan their own itineraries and activities and require up to date and accurate information on what is available and taking place which may be of interest to them. We shall develop a strong and coherent annual calendar of events that promotes the sector fully, and engages the marine tourism industry and its businesses and communities across Scotland.

From the traditional boat festival circuit to the recent celebration and excitement of the Commonwealth Flotilla coming up the Clyde, as the Tall Ships have done in the past, Scotland has a strong track record of staging regional, national and international events of a high quality which have helped to put Scotland on the marine tourism map. We have venues of an international standard for competitions and events, including the Championship sailing venue at Largs and Tiree’s reputation for windsurfing. We shall capitalise on these and other assets to promote Scotland’s marine tourism offering more fully.

Key Actions Under This Theme

1.1 Events and Festivals

- Develop a comprehensive list of marine and related events, and identify opportunities and gaps within the calendar
- Look to align and link regional, national and international events further to both cross-sell events and capture the wider economic and community impact and benefits
- Develop a sports specific event strategy for the sector, and build on the success of events such as the Scottish Series
- Secure two international events by 2020 (for example Tall Ships/ Volvo Ocean Race event)
- Revisit the River Festival and Clyde Fortnight, and ensure the coordination of the wide variety of regional and local events, with a focus on those with clear growth potential
- Build the capacity of communities to develop and maximise the economic impact of marine tourism events and festivals.

1.2 Cruising Route and Themed Journeys

- Map, develop and raise awareness of the main marine tourism routes and activity centres across Scotland, building on the work done by for example through SailWest and Malin Waters, and further develop the linkages into other tourism sectors
- Use visitor intelligence and data gathered to develop further themed product for the different identified market segments
- Explore and apply how other sectors have come together to create added value packages for the visitor, and additional impact for the businesses involved
- Look to ensure the services and facilities are in place to facilitate and support the customer itinerary, and choice of activity and experience to maximum effect
- Expand the choice available to the visitor in exploring Scotland's marine tourism offering.

Key Theme Success Factors:

- Additional visitors and increased repeat business
- Increased visitor spend
- Integration of the visitor offering
- Capturing and using effectively visitor data and information
- Development of new and existing themed routes

Improving the Customer Journey

3.0 The Strategic Framework for Marine Tourism

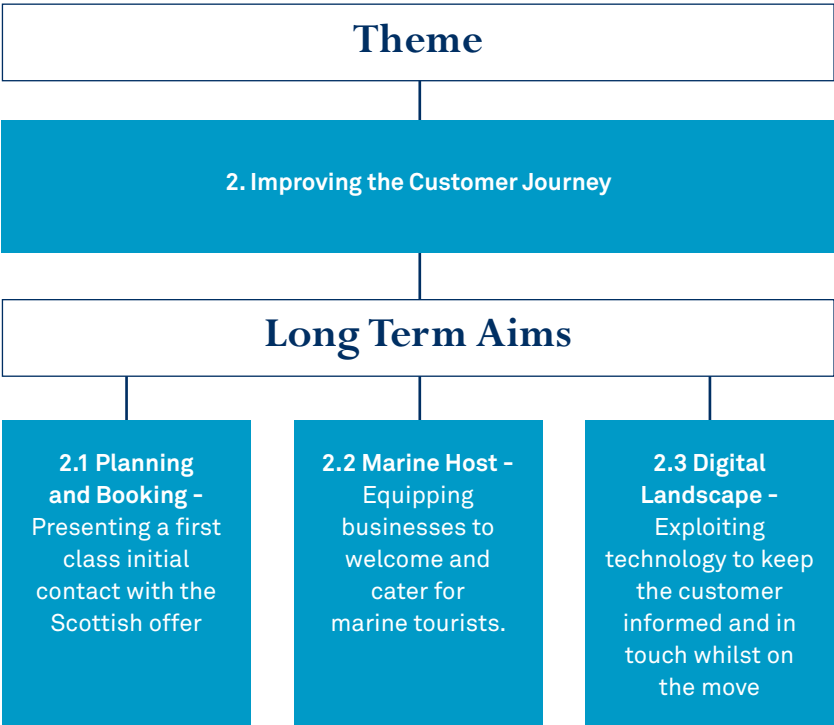


3.2



2. Improving the Customer Journey

This theme will ensure the provision of a consistently high quality visitor experience at all points of the customer journey. This will involve ensuring information is easily accessible and relevant for the visitor, and ensuring consistently high standards of customer service.



‘Improving the Customer Journey’ places the customer at the heart of the Strategic Framework for Marine Tourism, and recognises the many aspects of a marine tourism visitor’s holiday. We must ensure that every step of our customers’ journeys reflects the warm and proactive welcome we want them to receive, from the moment they start researching their visit to their homeward journey.

This theme focuses on attracting new and existing visitors, enhancing the communication and relationship with the visitor, and ensuring the customer experience is enhanced to encourage repeat business and longer stays.

Work under Planning and Booking will ensure that the customer is provided with timely, accessible and accurate information to allow choices and preferences to be made. This will also maximise the opportunity to upsell and package the final marine tourism product for the tourism visitor, with appropriate linkages increasingly established across the marine tourism businesses and offerings, and the wider coastal tourism attractions and visitor facilities.

Marine Host will bring new and improved customer service standards across the industry; based on the existing World Host programme, and the industry will work closely with the relevant skills organisations to tailor the existing customer service programmes for the marine tourism sector. It will drive new and more consistent standards of service and innovation in dealing effectively with the customer base.

We will exploit the opportunities new technology offers the tourist to keep them informed during their stay, whilst at the same time working with other sectors to influence the telecoms providers to put in place the required digital and mobile infrastructure for the marine tourism visitor, both on the water and on land. We shall ensure that the industry is better able to both make use of technology to keep the visitor informed and engaged, and use the different communication channels to better understand what the customer wants and is looking for.

Key Actions Under This Theme

2.1 Planning & Booking

- Establish high quality digital presence and appropriate central points of access to information for visitors
- Develop and implement new and easily accessible Sail Scotland website
- Map and gather the customer information and intelligence which exists to understand better customers' needs and priorities; and share this information widely across the industry and partners
- Ensure information provided to all customers is timely, relevant and accurate, and provides information on what is available for the visitor at each destination.

2.2 Marine Host

- Develop appropriate customer service training, and customer recognition awards for the industry
- Pilot and learn from different approaches to customer service development and enhancing the quality of the customer experience
- Refine Marine Host package, aligned to World Host, for the industry with appropriate training and accreditation
- Encourage collaboration across the industry to learn from best practice, and to celebrate success.

2.3 Digital Landscape

- Provide the means to keep in touch with the customer as they undertake the selected marine tourism experience, and seek to continually add value to the offering
- Encourage marine tourism businesses to look at the opportunity presented by new technologies and social media in interacting with the customer
- Encourage visitors to share their experience with friends and relatives, and work with businesses to influence their effective use of social media, and to put in place the wi-fi infrastructure required.

Key Theme Success Factors:

- Increase understanding across industry of customer groups and what they want
- Ensure customer information is accurate, up to date, and easy to access – clear first point of contact for marine tourism customers, and stronger on-going relationship with the customer segments
- Implementation of customer care training and a more consistent high quality customer experience through the appropriate training and accreditation
- Encourage more visitors to recommend Scotland as a marine tourism destination

Building our Capabilities

3.0 The Strategic Framework for Marine Tourism

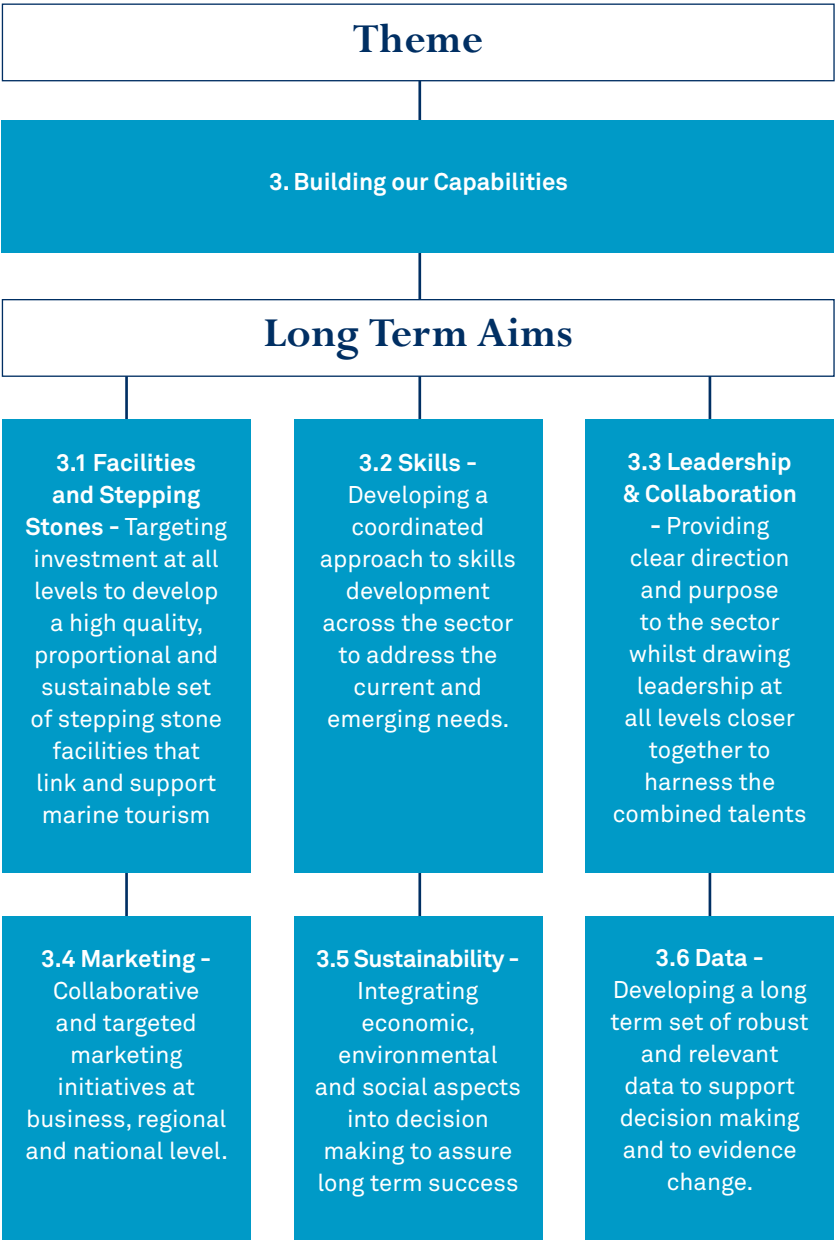


3.3



3. Building our Capabilities

This final theme will ensure the sector has a strong and sustainable foundation on which to deliver excellent visitor experiences by focusing on building the capacity of the marine tourism industry in terms of facilities, skills, marketing, collaboration and sustainability.



The 'Building our Capabilities' theme focuses on developing the strengths and capabilities of our sector to ensure it remains internationally competitive and it is able to achieve the sustainable and strong growth and economic impact it aspires to. There are many examples of good practice in place already, and these need to be built upon and extended across the industry to ensure a high standard of professionalism, customer focus and quality across the whole marine tourism customer experience.

It is critical that quality, relevant and timely information and evidence is collected and recorded to inform business and infrastructure decisions, shape future product development, and monitor and measure progress against the three themes and priority actions within the Strategic Framework. We shall work with the public sector and the relevant industry organisations to put in place a robust research and evidence base to ensure we have the necessary information to develop Scotland's marine tourism sector to its full potential, and to measure our progress effectively.

It is also important that the right infrastructure is in the right place to facilitate the growth of the sector, and to spread this growth across the coastal communities, inland waterways and wider tourism businesses where possible, and to enhance the visitor experience. Key to this will be the provision of adequate moorings, safe havens and step ashore facilities around the coast, inland waterways and islands of Scotland which ensure the visitor has access to appropriate facilities and services, and is able to experience and enjoy each marine destination.

The marine and coastal wildlife, seascapes and landscapes, and the marine environment of Scotland is what makes our marine tourism offering so unique.

The industry will work closely with the public sector and specifically the local authorities and the different local communities, to address and support identified improvements in the harbour and marina infrastructure, and the provision and improvements of pontoons and jetties around the coast and inland waterways of Scotland to enhance the visitor journey and experience.

Sustainability in its widest sense is an important and core element of the Strategic Framework, ensuring that the growth of the sector is achieved with due regard to conserving the precious marine resource and environment of Scotland, while providing increased opportunities for all communities to participate in the growth of the sector.

The marine and coastal wildlife, seascapes and landscapes, and the marine environment of Scotland is what makes our marine tourism offering so unique. The industry is committed to ensuring there is the necessary alignment not only with Scotland's National and Regional Marine Plans, but recognises also the importance of Scotland's Biodiversity Strategy, and Climate Change Adaptation Programme.

Effective and consistent marketing of the unique marine tourism proposition to the national and international visitor needs to be developed and sustained, and the market and customer focus of each segment of the industry further understood and developed through the Framework.

Similarly with skills, both the present and future skills gaps within the industry need to be identified and addressed, from softer customer service skills to more technical skills provision in areas such as outboard engineers and chandlers. The careers and opportunities within the industry will be better promoted and new talent developed and engaged to sustain and support the growth of the industry.

As with all Strategic Frameworks the collective and individual leadership of the industry will be critical to success. It will be crucial that leaders are encouraged to come forward and be supported, and the industry in its fullest sense engaged, with a clear sense of direction and priorities shared and established across the industry, working closely with the relevant public sector agencies.

Key Actions Under This Theme

Facilities and Stepping Stones

- Map the facilities and infrastructure in place across the marine tourism sector, and identify any critical infrastructure or capacity gaps, working closely with Marine Scotland and the Local Authorities
- Target investment at all levels to develop a high quality, proportional and sustainable set of stepping stone facilities that link and support marine tourism, and maximise the growth opportunities across the sector
- Influence developments to assure the facilities created match customer expectations, and respond to customer feedback and demand

Marketing

- Develop collaborative and targeted marketing initiatives promoting the visitor offering and experience at business, regional and national level, working closely with the DMOs
- Segment the marine tourism market, and identify the priority market opportunities and effective routes to these international markets and customers with a clear and consistent approach
- Develop a brand toolkit that can improve the consistency and reach of the marine tourism sector marketing

Skills

- Implement a coordinated approach to skills development across the sector to address current and emerging needs, and promote the career opportunities across the industry
- Work with the businesses to ensure key skills such as customer service, cross-selling and social media and digital marketing skills are in place and prioritised

Sustainability

- Integrate environmental, economic and social aspects into marine tourism business decision-making to assure long term success and sustainability
- Put in place proven mechanisms and accreditation schemes which recognise and reward the sustainability approach of businesses across the sector
- Promote the importance to marine tourists of conserving and enhancing the natural marine environment and wildlife

Leadership and Collaboration

- Provide clear direction and purpose to the sector whilst encouraging and promoting collective leadership across the sector.
- Establish clear and consistent priorities for the sector as set out within the Strategic Framework
- Encourage innovation and change across the industry focused on the needs and demands of the customer
- Work closely with the aligned sectors across coastal and adventure tourism, and with the DMOs and industry associations, to build genuine momentum across the industry

Data

- Develop a long term set of robust and relevant data to support decision making and to evidence change
- Ensure all businesses recognise the role they play in both gathering and using effectively customer information to develop the marine tourism product and experience they offer

Key Theme Success Factors:

- Map and ensure the provision of additional and improved facilities to fulfil an effective “Stepping Stones” journey – in the right places, and of the right quality
- Improved quality of existing facilities, and increase % use of existing facilities
- Greater adoption of tourism sustainability principles across the sector
- Ensure the right soft and hard skills are in place and developed across marine tourism. Seek to address the ageing demographic of the industry, and promote the industry as a positive career choice – awareness/skills training/accreditation
- Clarity and focus is achieved in the marketing and promotion of the Scottish marine tourism proposition in the UK and internationally.





Strategy into Action



04



The success of this Strategic Framework will depend on the commitment of all stakeholders across the Scottish marine tourism industry to continually improve our product and visitor experience, and promote our unique marine tourism experience at every opportunity.

We shall work collaboratively to unlock the knowledge, resources and support necessary to bring the Strategic Framework to life. A detailed Action Plan will accompany the Framework, setting out the short, medium and long term actions, and the roles and responsibilities of the different bodies involved, and how success will be measured.

The full Action Plan will be developed and in place for the Autumn Marine Tourism Seminar in 2015.

The Strategic Framework and Action Plan will be led by the industry, and co-ordinated and monitored through the Scottish Marine Tourism Development Group, SMTDG.

At the current time the SMTDG comprises of British Marine Federation Scotland, The Crown Estate, EventScotland, the Firth of Clyde Forum, Highlands & Islands Enterprise, Royal Yachting Association Scotland, Sail Scotland, Scottish Canals, Scottish Development International, Scottish Enterprise, Scottish Tourism Alliance, and VisitScotland.



The SMTDG will:

- Take lead responsibility for delivering specific identified actions
- Ensure the wide communication of actions and progress
- Liaise with industry to ensure input to actions on an ongoing basis
- Act as champions for the industry and champion a national strategic approach
- Monitor, review and report progress against the Strategic Framework

Other key stakeholders include Marine Scotland, the Local Authorities and Destination Management Organisations, and the different industry associations and organisations who represent the various sub-sectors of marine tourism from Wild Scotland to the clubs and associations, and education, sporting and training bodies active in marine tourism.

As the Action Plan is developed and implemented, every effort will be made to ensure the effective engagement and support of the communities and businesses who will be at the heart of ensuring that by 2020 Scotland is a marine tourism destination of first choice for high quality, value for money and memorable customer experience delivered by skilled and passionate people.



BMF Scotland

www.britishmarine.co.uk/scotland

BMF Scotland is the regional arm of The British Marine Federation (BMF), which is the trade association for the leisure, superyacht and small commercial marine industry in the UK. A large part of BMF Scotland's activity is lobbying and representation to promote the interests and development of the marine industry in Scotland. BMF Scotland will feed information about the business environment into the strategy and support the development of it to enable appropriate action and support.

The Crown Estate

www.thecrownestate.co.uk/our-business/in-scotland

The Crown Estate in Scotland manages about half of the coastal foreshore and almost all of the seabed. They will play a significant role in supporting marine leisure, ports and harbours. And with over 5,500 licensed moorings across the whole of Scotland, the organisation will play a lead role in managing the provision of moorings space for the Scottish boating community.

EventScotland

www.eventscotland.org

As the national events agency, EventScotland has lead public sector responsibility for the successful delivery of the national events strategy and will continue to work with the marine tourism industry to ensure that opportunities to host major events are delivered.

The Firth of Clyde Forum

www.clydeforum.com

The Firth of Clyde Forum is a voluntary partnership of local authorities, organisations, businesses and communities. Although primarily focused on the Clyde, the forum has committed to provide support and co-ordination for a largescale (Scotland wide) data collection project and act as a key link to the Cross Party Group (CPG) on Recreational Boating and Marine Tourism.

Highlands and Islands

Enterprise www.hie.co.uk

Highlands and Islands Enterprise (HIE) recognises that marine tourism plays a vital role in supporting and growing the economy of the Highlands and Islands region and Scotland as a whole. Therefore, HIE is coordinating the support of the Enterprise agencies to align with this strategy. HIE will support the marine tourism industry via the development of industry leadership, the dissemination of market intelligence and the delivery of targeted business development assistance for marine tourism related businesses.

RYA Scotland

www.ryascotland.org.uk

The Royal Yachting Association Scotland (RYAS) is the recognised governing body for sailing in all its forms in Scotland. RYAS will deliver programmes of activity, encourage development and racing, support environmental awareness, and provide advice to government, local authorities and coastal developers to promote the interests of the boating community in Scotland.

Sail Scotland

www.sailscotland.co.uk

Sail Scotland is the national marketing organisation for sailing and marine tourism. It is a not for profit industry association owned and governed by its membership. It represents and markets a diverse range of businesses including marinas, boatyards, charters, sailing schools, and sailing holiday companies. With a clear focus on key markets, Sail Scotland will promote Scotland as a destination of choice for sailing and marine tourism in order to grow visitor numbers and expenditure.

Scottish Canals

www.scottishcanals.co.uk

Scottish Canals is responsible to the Scottish Government for the management and development of five Scottish canals as well as the surrounding estate and The Falkirk Wheel. As 250-year-old working monuments, the canals are catalysts for sustainable economic development, regeneration and tourism that deliver a first class facility for the 21st century sailing, boating and leisure tourism market. Attracting 22 million visits per year, they also act as vital coast-to-coast arteries and gateways to Scotland's world-renowned sailing grounds.

Scottish Development International (SDI)

www.sdi.co.uk

Scottish Development International is a joint venture between the Scottish Government, Scottish Enterprise and Highlands and Islands Enterprise. It will deliver support to marine tourism companies looking to invest in Scotland including marina and resort developers. From an exporting perspective, SDI will also provide support to Sail Scotland and Scottish-based marine tourism businesses looking to develop their international markets and trade globally.

Scottish Enterprise

www.scottish-enterprise.com

Scottish Enterprise will work closely with Highlands and Islands Enterprise to ensure that support for industry leadership, market intelligence, and targeted business development assistance is seamless across Scotland.

Scottish Tourism Alliance

www.scottishtourismalliance.co.uk

The Scottish Tourism Alliance (STA) is an independent trade body comprising trade associations, businesses, and groups who have an active interest in tourism. The STA facilitates, co-ordinates and provides support to industry in delivering the national strategy: Tourism Scotland 2020. They will provide a platform for networking across industry sectors, ensuring that marine tourism plays a key role in the national strategy, through lobbying, advice and representation.

VisitScotland

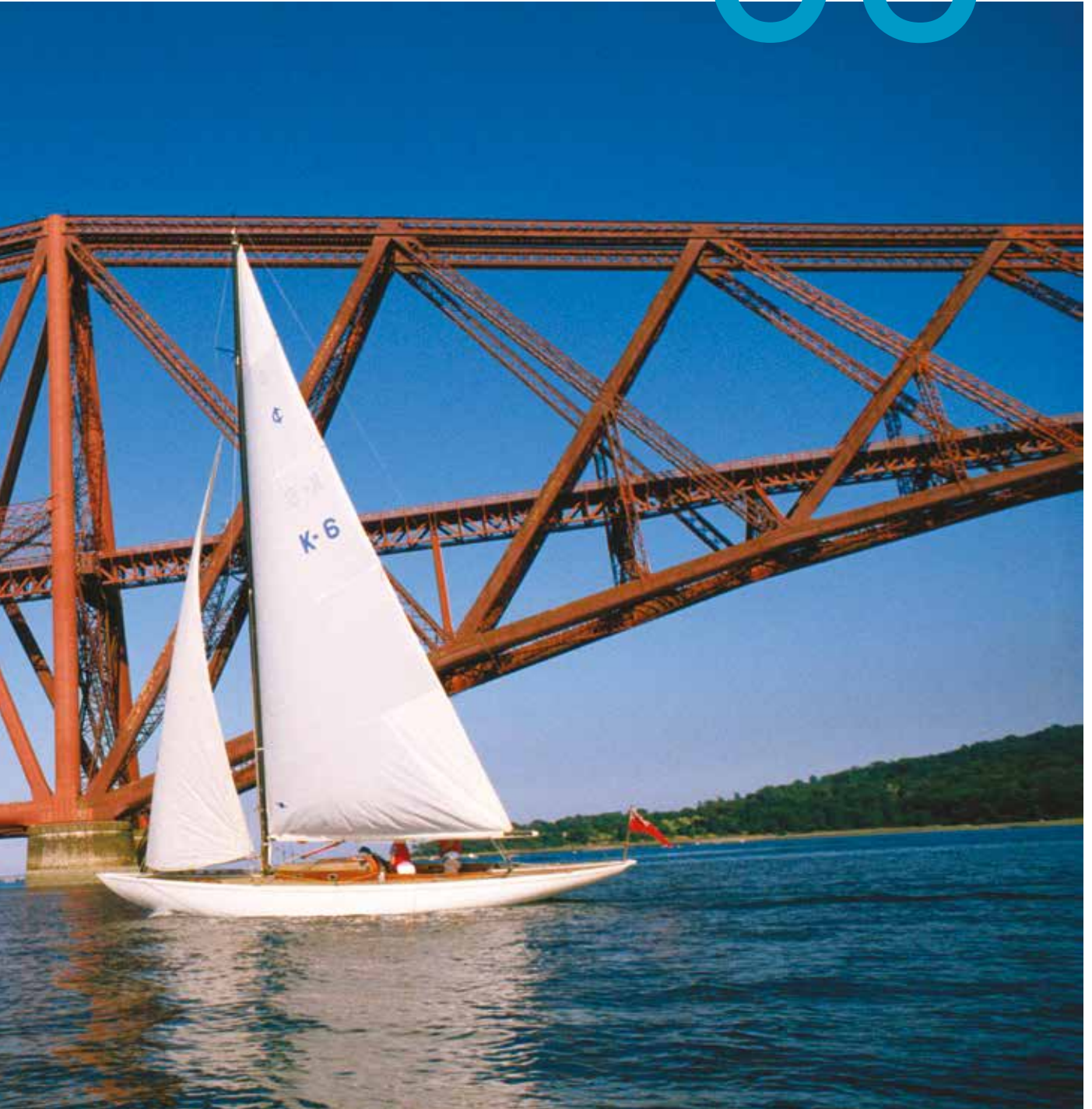
www.visitscotland.org

VisitScotland will support the marine tourism industry by working in partnership with Sail Scotland to deliver marketing and communication activities on a national and international level, with a focus on key markets, which informs and inspires visitors about Scotland's marine tourism product.

Measuring Success



05



Our vision

“To become a marine tourism destination of first choice for high quality, value for money and memorable customer experience delivered by skilled and passionate people.”

Our Mission

“To develop and lead the growth of sailing tourism in Scotland from £101m of visitor expenditure to £145m by 2020, and to increase the overall economic value of the marine tourism sector from £360m to over £450m by 2020.”

Our Key Measures are

- **Total Overnight Visitor Spend:** measure of value of industry
- **Visitor Satisfaction*:** measure of quality of visitor experience

In addition we have identified four further key performance indicators (KPIs) that will be developed, and an accurate baseline established, to understand and measure the full impact of the delivery of the Strategic Framework:

- Total turnover of the marine tourism sector
- Total jobs across the sector
- Average visitor spend
- Total number of visitors

In order to establish the baseline for each of these KPIs we shall work with the public agencies and industry bodies to agree the starting baseline, and how impact and performance will be measured against each KPI.

In addition to these measures there will be targets and milestones put in place within the Action Plan for each of the projects developed and delivered under the three core themes.

* These measures align with Tourism Scotland 2020, the national tourism strategy. The national strategy group is looking at ways to measure visitor satisfaction and the Marine Tourism Strategic Framework will look to align with this approach.

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Awakening the Giant
A Strategic Framework
for Scotland's Marine
Tourism Sector

