

A Second Strategic Framework
For Scotland's Marine
Tourism Sector

Giant Strides

A Marine Tourism Strategy
supporting communities, the
environment and economic
growth around Scotland's coasts,
lochs and waterways.



Contents

Introduction	4
A different kind of strategy	6
Who is the strategy for?	7
Did We Awaken The Giant?	8
Case studies	12
Regeneration: Scottish Canals	12
Growth Deals: North Ayrshire Council	13
Investment: Edinburgh Marina – Granton	14
Destination development: Oban North Pier Pontoons	14
What our industry says:	16
What the research tells us:	17
The World is Changing...	18
Megatrends	20
The challenges and expectations of our time	21
The ecosystem of support and place	21
Bringing sport, recreation and tourism together	22
Giant Strides: A Strategy Fit For 21st Century Tourism	24
Vision:	26
Mission:	26
Strategic Themes:	26
Targeting opportunities and markets	28
Our Contribution Story	29
Our waters: clean and blue	29
Our experiences: authentic and seamless	30
Our businesses: profitable and sustainable	31
Our people and communities: valued and healthy	32
Strategy Into Action: Partnership Planning and Working	38
Partnership Plan	40
Tracking and Reporting	41
What Can You Do?	42
Partners	44
Businesses, Community Groups and Clubs	45
The National Performance Framework explained	46
What are the UN Sustainable Development Goals?	47
What is natural capital?	48
What is sustainability?	48
What is the “Ecosystem of support”	48
Resources	49
Plan on a Page	50

Our Vision:

That Scotland will be a world leader in 21st century sustainable marine tourism.

Our Mission:

Marine tourism is sustainable and meets changing consumer, workforce, community and environmental needs and expectations, whilst growing the industry’s overall economic contribution to over £500 million by 2025.

We will deliver our vision and mission by focusing on four core themes:

- Our waters
- Our experiences
- Our businesses
- Our people and communities

We will deliver these themes through working with partners, supported by an annually revised Partnership Plan.

Introduction



A different kind of strategy



By **Stuart McMillan MSP**,

Convener of the Cross-Party Group for Recreational Boating and Marine Tourism

“Giant Strides is a different kind of strategy.

It takes a much broader and fuller view of marine tourism and its unique role in rural, coastal and island communities. It marks a pronounced shift away from the classic narrow focus on financial growth to become a strategy that drives multiple benefits across communities, the environment and the economy.

Scottish marine tourism has significant potential; simultaneously it can support local communities, drive investment in Scotland’s incredible Natural Capital and increase the economic contribution to Scotland to over £500 million by 2025. Marine tourism can become the model of a sustainable sector.

Much like the **Cross-Party Group for Recreational Boating and Marine Tourism (CPG)**, this strategy also fully integrates **sport** and **recreation** with tourism, aligning with work by a host of partners that drive greater levels of participation and enhanced health and wellbeing outcomes for communities and visitors.

Giant Strides builds on the shoulders of its predecessor – **Awakening the Giant** – and the work of the Cross-Party Group for Recreational Boating and Marine Tourism. Awakening the Giant aligned the sector, supported remote and rural economies and led regeneration activities across Scotland.

This strategy has also been adjusted to address weaknesses in Awakening the Giant. Specifically, there will be a much clearer focus on “place” to reflect the significant shifts in the business support environment and the Action Plan has been replaced with a **Partnership Plan** approach.

The first Partnership Plan will be published before the end of 2020 and will be refreshed annually. Drawing directly from the themes and objectives of this strategy it will focus and define activity for the period. These will be delivered by groups of partners who are best placed and resourced to take the activity to conclusion. This will also allow the sector to be flexible, to respond to opportunity and to identify and work with a host of new partners.

The Cross-Party Group will play a new and exciting role in this process; drawing partners together and helping to build teams who then take one or more of the strategy objectives forward. Partners are essential – do consider how you can help!

I am very pleased and proud to have been part of the journey that has brought the sector to this point, to have been one of the many people who helped to **wake the giant** and now to be part of setting the sector up for the next steps; our **Giant Strides**. It is also particularly fitting for Giant Strides to be launched in **Scotland’s Year of Coasts and Waters.**”

Who is the strategy for?

This strategy is about much more than sailing!

Awakening the Giant sought to define marine tourism as an activity that is hosted or focused on the water. The perception however remains that marine tourism is synonymous with sailing. This is not the case. Marine tourism covers a rich collection of sports and recreational activities on coastal and inland waters. Some of the fastest growing include kayaking and stand up paddle boards (SUPs) as well as coastal rowing and wild swimming.

There are important relationships between these activities too with many of the more accessible and lower cost experiences acting as gateways to others. The mix also addresses the variety of waters and conditions that can be experienced around Scotland with some activities lending themselves to windless still days on inland waterways and others coming into their own in wilder weather out at sea.

Giant Strides is written with a view to supporting the whole of this rich group. It has also been written with a number of audiences in mind;

The first is the **“ecosystem of support”¹** that can help marine tourism to thrive. Since the publication of **Awakening the Giant** this ecosystem has changed considerably and so too has the way many of these organisations work. This strategy aims to inform and align this broad group of supporters to help to make sure that opportunities in Marine Tourism are supported.

The ecosystem includes a wide variety of organisations across the public, private and third sectors who are working to support and develop businesses and communities across Scotland. It includes national agencies like Scottish Enterprise, Highlands and Islands Enterprise, South of Scotland Enterprise and VisitScotland as well as place specific organisations like the Destination Marketing Organisations (DMOs). With the shift in emphasis of this plan it now also includes organisations like Scottish Natural Heritage, Scottish Environmental Protection Agency and Scottish Environment Link.

The strategy is also intended for **Local Authorities** and others who drive regeneration and development in communities across Scotland and the islands. The strategy draws attention to the unique role marine tourism plays in driving multiple outcomes across the economy, society and the environment often in some of the most remote and fragile communities.

The strategy is also written for **businesses, community groups and clubs** who we hope to inspire and inform as they lay out their plans for the future. Navigating this support environment to bring those plans to life is challenging. This strategy has been written to equip this group with the language and understanding necessary to navigate it and to benefit from it.

Whilst this strategy is not written directly for consumers, it is responding directly to changing customer expectations and trends, and the strategy does intend to mark Scotland out as a leader in meeting these expectations as well as being at the forefront of developing sustainable approaches fit for the challenges posed by the **climate** and **nature emergencies**. In doing so the strategy aims to support the development of **Brand Scotland** and position Scottish Marine Tourism as an exemplar.

¹ Find out more about the “ecosystem of support” on page 48



Did we Awaken the Giant?



Awakening the Giant was the first Marine Tourism Strategy to be adopted in Scotland. Before being adopted the marine tourism sector had significant potential - having some of the most highly rated sailing waters in the world - but it had failed to unlock its full potential. The sector was operating in isolated groups and was not linked to the broader efforts to drive tourism in Scotland. This is no longer the case.

The marine tourism sector has come together; creating jobs, securing investment, driving inclusive growth, commissioning new research and influencing government policy.

Awakening the Giant set out to drive “visitor expenditure from £101m to £145m and increase the overall economic value of the sector from £360m to over £450m by 2020” and there has been notable progress. By 2016 the visitor expenditure had reached £131m² and the overall contribution of the sector – Gross Value Added (GVA) – in 2017/18 reached £411m³. Whilst some businesses have reported a dampening effect on activity since the UK voted to leave the European Union, these mid-period indicators provide a strong endorsement of the impact of the strategy.

There is a wealth of other evidence to indicate marked progress in the sector too. At a regional level a mid-period review⁴ of Highlands and Islands investments indicated that £1.5m of public funding drove £8m in investments (over 5:1 leverage ratio) which had created 22 FTE jobs and £1.43m of new turnover by September 2018.

This support continues to grow, HIE has invested £26.88m Grant-in-Aid towards projects in the marine sector since 2015. This includes a mix of infrastructure capital investment; business development; community grants and training towards leadership and capacity building.⁵

A practical insight to the success **Awakening the Giant** supported and inspired came direct from a charter boat owner who contributed to the consultation:

“A major break-through in developing and implementing the marine tourism strategy has been to bring together the various stake holders. This is in contrast to the factionalism evidenced a decade or so ago. This harmony has secured the political drive (and funding) necessary to make changes and should be safeguarded as a priority.

The step-ashore investments made to date on the West Coast have been substantial. In the last decade or so I have seen new pontoons or mooring buoys established at many locations including:

Girvan, Campbeltown, Lochranza, East Loch Tarbert, Rothesay, Loch Ryan, Millport, Port Bannatyne, Brodick, Lamlash, Otter Ferry, Portavadie, Irvine, Rathlin Island, Port Ellen, Gigha, Craighouse, Oban, Fort William, Easdale, Loch Aline, Tobermory, Salen, Kilchoan, Arinagour, Rum, Canna, Mallaig, Isle Ornsay, Kyle of Lochalsh, Plockton, Portree, Acairsed Mhor, Loch Torridon, Gairloch, Ullapool, Lochinver, Kinlochbervie, Castlebay, Eriskay, Loch Boisdale, Loch Maddy, Leverburgh, East Loch Tarbert (Harris), Scalpay and Stornoway.

The list is not exhaustive, but I have bored you with this list of 46 locations to emphasize the degree and rate of change.”

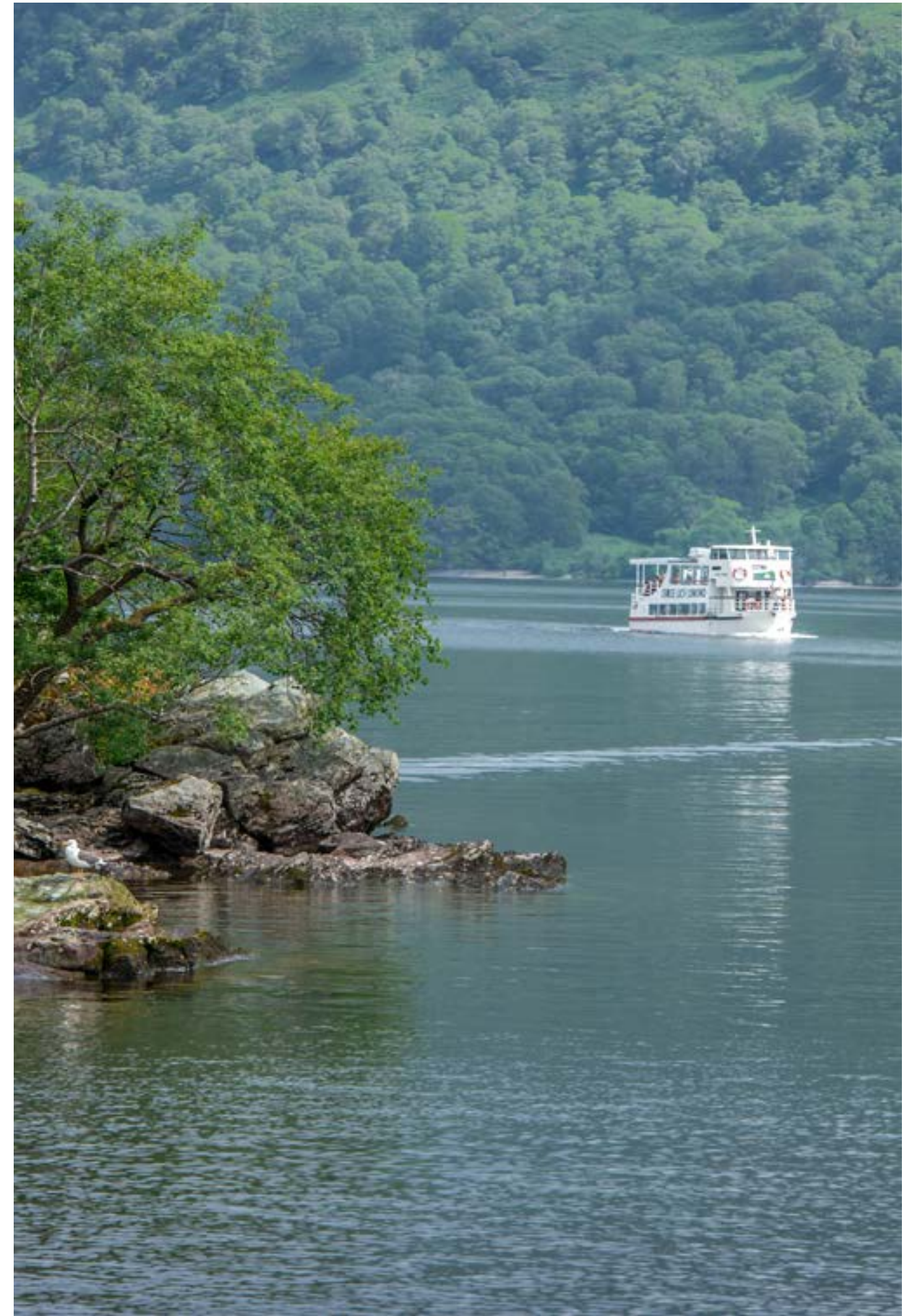
Case studies also offer a particularly rich insight to the impact of the strategy.

² **Sailing Tourism in Scotland**, EKOS, 2016

³ **Economic Benefits of UK Boating Tourism**, 2017-18, British Marine

⁴ **HIE support to Marine Tourism Projects**, HIE, 2015-2018

⁵ **Giant Strides HIE response to consultation**, January 2020



Case studies

Regeneration: Scottish Canals

Scotland's canals have attracted a staggering £1.53 billion of investment since the re-opening of the Lowland inland waterways in 2002, according to the latest economic impact study commissioned by Scottish Canals.

The recent study, carried out by Peter Brett Associates, found that the transformation of Scotland's canals into vibrant, animated and popular corridors of leisure, tourism and business has acted as a catalyst for an extraordinary £1.53 billion of investment, contributing to the creation of thousands of new houses and jobs.

The report also revealed that the pace of change has accelerated over the last three years, coinciding with the first Marine Tourism Strategy 'Awakening the Giant', with a 250% increase in investment in the canal corridors compared to the previous period (2010-2015).

The latest report, which tracks the economic performance of Scotland's canals between January 2016 and June 2019, reveals that over 2,100 FTE roles and 4,400 construction jobs have been created – up 6.5% on the previous period.

www.scottishcanals.co.uk



Growth Deals: North Ayrshire Council

North Ayrshire Council has embraced the tremendous potential of marine tourism to contribute to the growth of their coastal and island economies, to support regeneration, education, jobs and to support the development of North Ayrshire as a leading tourism destination. Marine activities and marine tourism is at the heart of their 'Making Waves Tourism Action Plan' and played a fundamental role in their Ayrshire Growth Deal funding application.

The application was highly successful and in early 2019 funding of £200m was announced for Ayrshire. Within the funding package The Scottish Government will invest up to £9.5 million in marine tourism over a number of years, delivering critical infrastructure to enable investment to secure the development of the marine tourism industry in North Ayrshire. This investment will focus on securing infrastructure that supports key components such as sailing and boating, marine leisure, and recreation. (source Holyrood.com/news)

<https://www.north-ayrshire.gov.uk/Documents/Making-Waves-in-North-Ayrshire.pdf>

Investment: Edinburgh Marina – Granton

The Marine Tourism Strategy played a significant role in the successful planning application for a spectacular new large marina development close to the centre of Edinburgh. The strategy helped the developers highlight the growth potential of the sector and the significant role marine tourism can play in urban regeneration.

The new state-of-the-art Edinburgh Marina will comprise 427 berths with 24/7 access at all states of tide and a luxurious new club house with restaurant, bar, locker rooms and shop. This new marina development is set alongside Scotland's first Hyatt Regency Spa and Conference Hotel and over 550 new apartments some of which will directly overlook the new marina.

<https://edinburgh-marina.com/>



Destination development: Oban North Pier Pontoons

Opened in August 2017 the North Pier Pontoons at Oban represent a £2.5m investment, by Argyll and Bute Council, Highlands and Islands Enterprise and the Scottish Government, in Marine Tourism and the Awakening the Giant Strategy.

A proposal for pontoons at Oban has been considered on numerous occasions over the last 40 years. Oban had the potential to be a core hub for the West Coast boating sector, and a step ashore facility in the town would not only increase local spend and increase marine visits to the area but would make sailing on the West Coast of Scotland more accessible.

The pontoons have been increasing in popularity with business doubling between the 2018 and 2019 seasons. The facility not only handles visiting boaters, charterers and events but acts as a landing point for thousands of cruise ship passengers.

The new visitor centre, toilets, showers and retail unit on the North Pier provide modern facilities to support the pontoons and complement the existing restaurants on the quay.

Limited to a maximum 3 night stay the town benefits from a higher direct spend from marine tourists, whilst the other local marinas benefit from the longer stays for vessels changing crews, overwintering, repairs and services related to the increased boat visits to Oban. The facility has been welcomed by other destinations such as Tobermory, Loch Aline and Skye as it makes victualling, crew change and links to the communications network much easier, encouraging longer trips on the West Coast.

What our industry says:

British Marine Scotland surveyed their members to more fully consider the impact of the first Marine Tourism Strategy on them. Their feedback provided validation and challenges to be addressed as we consider the next strategic period:

- 69% of industry feels the Marine Tourism Strategy was useful (5% do not) with 60% stating it had made a difference (10% do not).
- More than 85% feel infrastructure is key to development of the sector. They also noted that blended development is needed with long term – “sail to”, or “sail from” facilities balanced against short term – “sail through” or visitor facilities. This will ensure displacement and dispersal – the

natural consequence of cruising - is managed and a series of more accessible “stepping stone” routes developed.

- More than 50% report business confidence is increasing (<15% report decreasing). Overwintering and long-term berthing felt to be areas of opportunity and worth focusing on.
- More than 35% do not feel enough is being done to promote marine tourism in Scotland with a further >25% unsure. <40% feel enough is being done.
- More than 60% feel there are skills deficiencies in the sector (less than 20% feel there are not)



What the research tells us:

- **GVA – £411m (2017-18).**
- **>268,000 hours of volunteering adding at least £2.4m to the economy.**

The mid-period surveys provide a useful insight to changes and progress in the sector. The UK level British Marine report **Economic Benefits of UK Boating Tourism**, 2017-18 published in March 2019 indicates that Scotland accounts for 6% (£380m) of UK turnover in the sector and 7% of UK GVA (£411m). There has also been significant growth in the sector of more than 64% over last five years and the sector in Scotland now supports around 2170⁶ direct jobs in the industry and a further 9700 from indirect expenditure. These represent 6% of UK totals.

The EKOS research **Sailing Tourism in Scotland** – published in 2016 provides another, more detailed, view on part of the sector. The headline indicator is that sailing tourism drove output of £131m in 2016 with 30% coming from non-Scottish visitors. The research also indicated growth to 2016 of 28% from 2009 with 44% growth in non-Scottish segments (11% and 24% respectively at “constant” (adjusted) prices).

The report also indicates that there is still significant opportunity to be realised with the potential to grow output to £167.1m (£153m adjusted) through delivery of new “sail from, sail to and sail through” capacity.

Marine tourism and participation across the UK are closely related with the Scottish and UK pools of participants being the largest market segments for Scottish marine tourism. The Arkenford **Watersports Participation Survey UK 2018** shows growth in any water activity for the third consecutive year. Participation in boating is however flat (-0.1% from 2017) with two year trends in yacht cruising also flat (-0.1%).

The ten-year trend for yacht cruising is also flat (-0.1%) but there are notable increases in canal boats (0.3%) and canoeing (1.3%). The research also noted a broader trend to see people being more active on holiday, which Scotland is well positioned to respond to. The ten year trend in boat ownership is flat (2.68% to 2.65%). Although Motorboats (0.38% to 0.29%) and yacht (0.26% to 0.22%) ownership have been in slow decline, these reductions have been offset by the growth in canoe ownership.

Against these UK trends, there is strong evidence of growth in participation in Scotland. RYA Scotland has seen a year on year growth in club membership from 19,800 in 2016 to 21,078 (29,578 including online clubs) in 2019. First time experiences, through initiatives such as Push the Boat Out, are bringing increasing numbers of new people to boating, with 3,100 in 2017, to 3,642 in 2019. There is also a rise in demand for formal training with the number of RYA certificates issued growing from 2,931 in 2015 to 3,478 in 2018. This increasing demand in the market has led to three new commercial training centres opening in the west of Scotland since 2015.

More broadly research conducted by Royal Yachting Association Scotland demonstrates a minimum of 268,000 hours of volunteering taking place across their affiliated clubs in Scotland. This adds circa £2.4m to local economies and drives numerous health and well-being benefits.

Whilst none of these flat trends give cause for alarm, others do indicate some areas of potential focus, including targeting of the rest of the UK market to capitalise on the interest in more active holidays, integrating learning or skills development with active experiences, adjustments to more fully cater for the growth in canoeing and stand up paddle boards and further activity to bolster and improve Scottish water sports participation.

The giant is awake, but our work is not done, and the game is changing.

We now have the opportunity to unlock the full potential of marine tourism; to drive long term sustainable growth, to support remote and fragile rural economies, to invest in our workforce and the natural capital upon which we depend, to play a full part in achieving a net-zero carbon economy and to support current and future generations to benefit from the joys of spending time in the wild.

The world is changing...

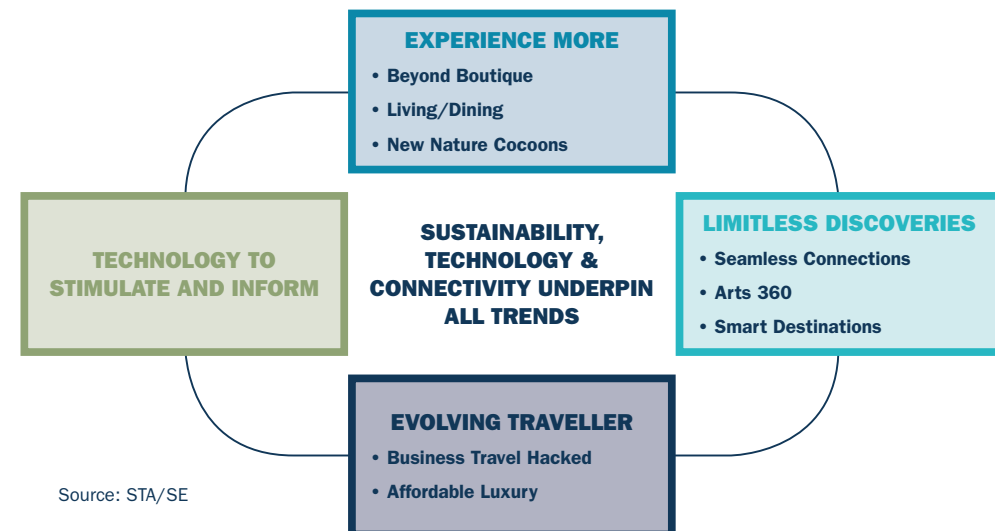


A lot has changed since the publication of *Awakening the Giant* and our next strategy must be fit for new challenges and embrace the future.

Megatrends

One of the best ways to explore what has changed already and what looks likely to happen is to consider megatrends. Megatrends describe the global shifts in views, attitudes and behaviours that have a huge impact on everything in our lives – business, economy, society, culture and more. Megatrends are impacting Scottish tourism and marine tourism already and will likely drive many more changes to come.

The Scottish Tourism Alliance and Scottish Enterprise commissioned in-depth research⁷ and consultation to explore these global changes and consider the most relevant elements to Scottish tourism. Global tourism experts refer to twelve Megatrends happening today. The study grouped elements of these to identify four key trends that are driving changes that Scotland will face between now and 2025. These trends are:



These trends are already driving consumer and workforce behaviours across the globe and in the marine tourism sector and are set to change further still over the coming years⁸. Consumers expect our products and services to be environmentally responsible and our employees are increasingly looking for more than just a job, they want a purpose.

The challenges and expectations of our time

There are a host of other related factors at play too that need consideration as we shape our approach for the next five years. The **climate and nature emergencies** have come into much greater focus and not only has Scottish Government policy shifted, and it will continue doing so in order to address these challenges; Scotland will be carbon Net-Zero by 2045. When will we?

Over-tourism in some high demand locations is an emerging challenge, with some communities feeling significant and unwelcome pressures from visitors. New forms of tax are being considered to underpin investments in the public realm and new ways to encourage dispersal are being explored too. Are we doing all we can to support the communities on which our sector depends?

*Whilst some sectors may view these as challenges with trepidation, marine tourism, being so close to the natural environment and so deeply embedded in communities, is extremely well placed to respond and to become a leading light in this **new age of tourism**.*

The changing expectations of the electorate and consumers mean there is a greater focus on the measurement of impacts beyond Gross Domestic Product (GDP) and other traditional economic measures. The Scottish Government has, through the Community Empowerment Act, adopted a Performance Framework⁹ that seeks to encourage and capture impacts beyond GDP and are directly mapped to the United Nations Sustainable Development Goals¹⁰. They have also begun to look at natural capital accounting, business more broadly is exploring what it means to be sustainable and triple bottom line accounting to illustrate the total impact of their activity in economic, societal and environmental terms. More information about each of these terms is available later in this document.

The ecosystem of support and place

The way businesses and community groups are supported has changed completely across the lifetime of *Awakening the Giant*.

The majority of investments made into rural and coastal communities and businesses are now focused on "place" and "placemaking". Highlands and Islands Enterprise (HIE) has operated this model for a number of years, with almost all of the support provided to marine tourism delivered through their Area Team network (place based) activities. Their refreshed strategy¹¹ continues this approach. Scottish Enterprise's new strategy¹² and the associated restructuring of their support systems has significantly increased their focus on "place" and marine tourism activities are ideally positioned to benefit from this shift.

There have also been a lot of changes to the broader "ecosystem of support". Notably the work of Scotland CAN DO has brought many of the business support groups and services closer together as well as the development of a portal to help businesses reach support much more quickly.

Scottish Government has also begun a process of streamlining all of the support offered by the enterprise and skills agencies (SE, HIE, Business Gateway etc.) on to one website: www.findbusinesssupport.gov.scot. The website is still being developed but already has 200 of the most useful tools and services in one place.

In addition to all of these changes the way Scotland's brand is built and projected around the world has also transformed. VisitScotland, Scottish Development International, Scottish Government and Universities Scotland now all collaborate through the **#ScotlandIsNow** campaign to align Scotland's international narrative through one marketing platform.

One of the aims of this strategy is to help make sure that Marine Tourism is fully equipped to navigate and benefit from the full suite of support that is available.

7 Source: <https://scottishtourismalliance.co.uk/megatrends/>

8 Passport - CHANGING THE MINDSET: TRAVEL AND SUSTAINABILITY October 2018

9 National Performance Framework

10 UN Sustainable Development Goals

11 <https://www.hie.co.uk/media/5006/strategyplusplanplus2019-2022-1.pdf>

12 <https://www.scottish-enterprise.com/media/3109/scottish-enterprise-building-scotland's-future-today.pdf>

Aligning our activity

In developing Giant Strides, we have sought to make sure that it aligns with key strategies that influence our sector. Of particular note are the deliberate and close alignment to the **National Tourism Strategy**¹³ and to **The Environment Strategy for Scotland**¹⁴.

There is however an ever-growing list of strategies in place or being developed, so referencing and explicitly aligning with each one is impractical. Our alignment to the overall National Performance Framework ensures a good level of universal alignment to current and future strategies.

Tourism does not stop at our borders and also noting our biggest market is UK domestic we have also sought to align with and complement UK activity and in particular **British Marine's National Agenda**¹⁵.

Bringing sport, recreation and tourism together

Over the lifetime of Awakening the Giant, we became aware that key activities within marine tourism are identified and supported as sport. For example, sail and motor cruising, windsurfing, kayaking, paddle boarding and kiteboarding are each associated with a governing body defined by the Scottish Government as a sport and funded as such.

There are also a host of recreational activities that support communities and rural economies that are not identified as a sport nor are they meaningfully captured within tourism strategies. Fixed seat coastal rowing is a prime example with ten-fold growth in participation over the last 10 years as well as notable, and growing, economic and social benefits.

This strategy deliberately seeks to draw sport, recreation and tourism together to identify wider synergies and increase the benefit for individuals, communities, businesses and government from engaging resident populations and visiting tourists in activities that are both sports and contributors to marine tourism.

In doing so we will demonstrate how marine tourism creates enhanced opportunities for more people to be more active and stay active, contributing more demonstrably to the health and wellbeing, connectedness, physical confidence and competence of local communities as well as being a direct driver for education, employability and lifelong learning in remote and coastal communities. Sport and recreation also play a significant part in creating long term demand for marine tourism services and feeder communities for other marine tourism activities.



13 <https://scottishtourismalliance.co.uk/draft-strategy/>

14 <https://www.gov.scot/publications/environment-strategy-scotland-vision-outcomes/>

15 <https://britishmarine.co.uk/Services/Representation-and-Promotion/Our-National-Agenda>

Giant Strides: a strategy fit for 21st Century Tourism



Tourism has changed and, with the right support, we can respond to these changes quicker than other countries and define what 21st century sustainable marine tourism should be.

Vision:

For Scotland to be a world leader in 21st century sustainable marine tourism.

Mission:

To ensure Scottish marine tourism is sustainable and meets changing consumer, workforce, community and environmental needs and expectations, whilst growing the industry's overall economic contribution to over £0.5 billion by 2025.

Strategic Themes:

We will deliver our vision and mission by focusing on four strategic themes:

Our waters: clean and blue

To be stewards of the natural environment we access; investing in natural capital, supporting wildlife and addressing our waste and emissions.

Our experiences: authentic and seamless

To provide authentic seamless experiences that create special lasting memories.

Our people and our communities: valued and healthy

To establish marine tourism as a career of first choice, as a force for good across the communities we are part of and to inspire more people to engage in our activities.

Our businesses: profitable and sustainable

To support our businesses to be more sustainable, more profitable and more ambitious.

Our Partnership Plan

An annually refreshed plan that aligns and focuses delivery of the 14 objectives through a series of Partnerships.



This vision challenges our entire sector to evolve and be the first - and one of the best - at providing a 21st century marine tourism experience.

The **mission** is more explicit; pushing our sector to refresh and evolve in order to meet customer, workforce, community and environmental needs. In so doing the sector can unlock long term, sustainable and inclusive growth and drive an economic contribution that exceeds £500 million a year.

The **strategic themes** are intended to closely align with the strategic priorities of the national strategy. This alignment will help to maintain and build coordination, demonstrate the contribution of marine tourism to the broader sector and improve the relationship between this strategy and other sector/destination approaches to development. The themes have been tuned to more accurately reflect the challenges and opportunities of the marine tourism sector and to highlight the specific and watery nature of our “place” of activity.

Targeting opportunities and markets

Marketing and effective communication with key audiences and segments will be critical to the success of this strategy.

At a national level the refreshed focus of **Scotland IS NOW** is already helping to enhance the Scottish brand internationally. The campaign is built on authentic content that focuses on key Scottish strengths – many of which are integral to the marine tourism experience – and is also positioning Scotland as being responsible and caring of communities and environment. VisitScotland has also tuned their activity to work seamlessly with it.

To capitalise fully on the work of Scotland IS NOW and VisitScotland we must support the development of content for the national campaigns and seek to develop our own direct marketing activities to lever the benefits of their broader activity.

These themes are intended to be pursued concurrently and are of equal importance. This is essential for a sustainable outcome to be achieved. No one area should lag, nor should any area leap ahead at the expense of one of the other themes.

Each theme is supported by a series of **objectives** – laid out below – that provide focus for activities driven by partners, businesses and community groups across the whole sector. This process will be supported by a Partnership Plan published before the end of 2020 and revised annually.

As part of the partnership planning process detailed targeting of specific markets, segments and campaigns will be developed and shared and we anticipate that a group of partners driving and coordinating marketing across the sector will emerge as part of this process.

It is already clear that growing activity sectors including kayaking, coastal rowing and stand up paddle boarding should be targeted as opportunities. Changing demographics and new models of boat ownership may lead to spare capacity in Scottish marinas; targeting of yacht and motorboat owners in England and Ireland to move their boats permanently to Scotland would mitigate this change and add depth to existing sales pipelines. The wildlife in our waters also offer opportunities to see the growth of the wildlife watching market. There also exist a host of other opportunities by linking the waterborne offer tightly to that offered on shore.

Our Contribution Story

Marine tourism underpins rural and island economies, supports remote and fragile communities, invests in nature and provides a host of health and wellbeing benefits. This strategy sets out the challenge and work needed to drive even greater returns across a breadth of the national outcomes and UN Sustainable Development Goals.



Our Contribution. Marine tourism directly supports all 11 outcomes of the National Performance Framework and 12 of the 17 UN Sustainable Development Goals.

Our waters: clean and blue

This theme is all about the **special place** that characterises marine tourism experiences; our seas, waterways and our coastline. It is also about the remarkable **wildlife** that brings these experiences to life. Including the charismatic flagship species like whales and dolphins and the ecosystems upon which they depend.

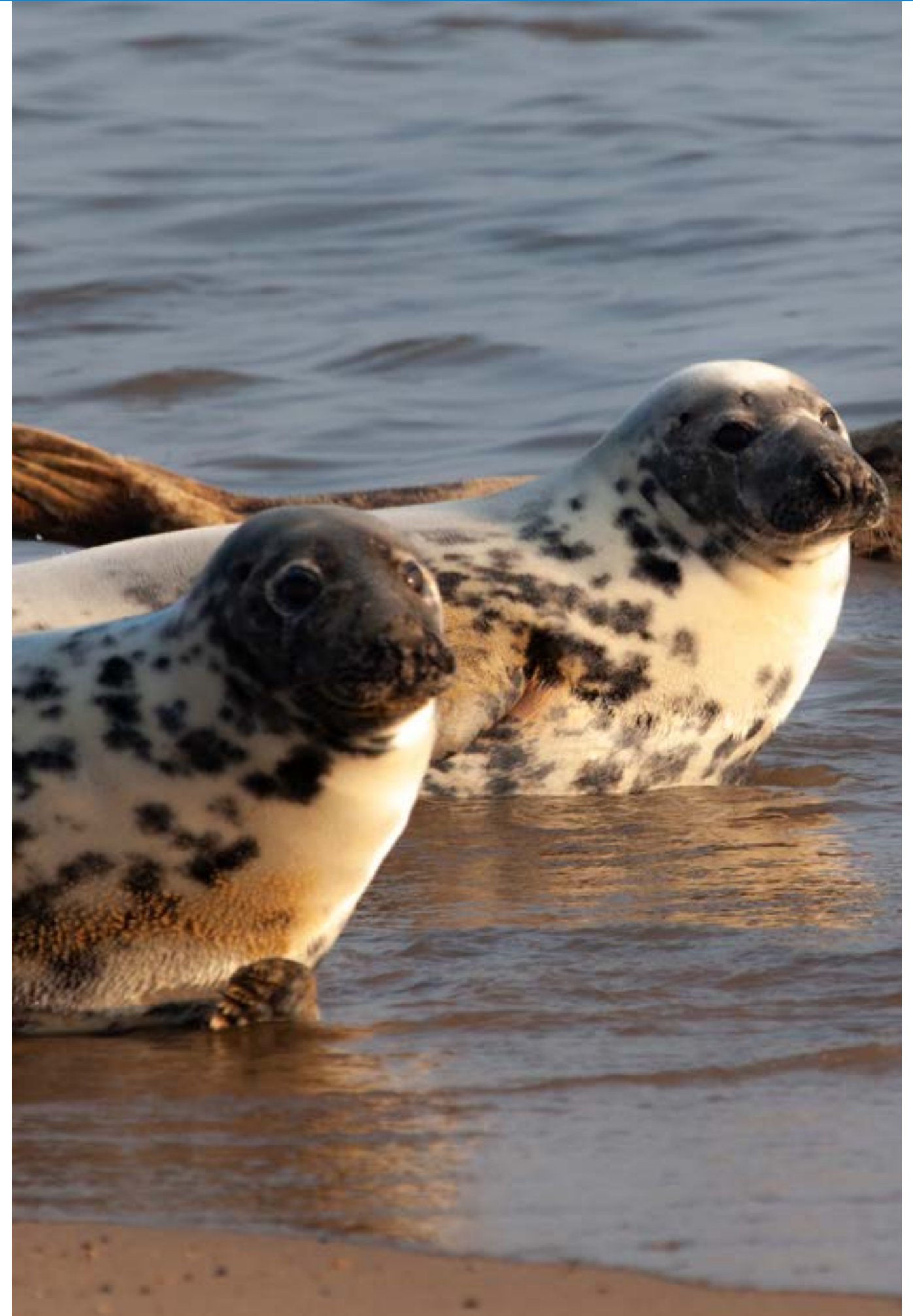
This theme also captures the work necessary to allow us to continue to promote Scotland as an ethical, **'clean seas'** tourism destination. That will likely include work to encourage behavioural change and understanding (like The Green Blue)¹⁶ to radically reduce single-use plastics, initiatives which minimise wildlife disturbance and address litter as well as the promotion of citizen science.

This is also the theme where we bench mark our greenhouse gas (GHG) emissions and challenge our sector to become a **GHG Net-zero** element of the Scottish economy and agree the plan that brings that ambition to life.

This theme also covers **infrastructure**. Piers, pontoons, locks, harbours and mooring buoys are all part of the place we operate in and interact with our waters. They must be maintained and developed sensitively to not only meet the needs of customers and visitors but to also maximise their benefits to communities and to the environment.



¹⁶ <https://thegreenblue.org.uk/>



Our experiences: authentic and seamless

The **experiences** we offer will underpin our reputation. We will be judged quickly, and that view will be shared with others across the world at speed. This is how we can stand out on a **global stage** and redefine the 21st century marine tourism experience. Most experiences now move back and forth between the digital and physical worlds; we must seek to develop that process and experience in both worlds to be seamless and enjoyable.

Our products will have to be refined and developed in order to meet rapidly changing customer expectations. We also have the chance to develop **new products** and services that capitalise on emerging technologies and opportunities in the low carbon and circular economies.



Our businesses: profitable and sustainable

This theme is all about the actions that can be taken to build and support the businesses, community groups and clubs in our sector and how they work with place-based developments.

Marketing and enhancing our ability to inform and inspire customers will be crucial to driving demand. This must integrate and lever the benefits of national activity and will include the use of all digital channels and activities to reach and engage communities of interest. Businesses are well placed to take advantage of the industry's marketing organisation, Sail Scotland.

This theme also seeks to improve and coordinate the **support** available to businesses, community groups, clubs and their **leaders**. This will help them seize opportunity, achieve sustainability, improve productivity, drive profitability and embed innovation into the way they operate.

Collaboration will be critical for success, working across sectors to drive innovation, to access support and build teams that can unlock new opportunities and drive greater returns. Working with sector marketing groups and **place-based** groups will be particularly relevant; reaching key segments, improving the experience of the place for visitors and residents alike as well as improving access to funding and support. The Partnership Plan will be a major driver to encourage and establish this way of working.



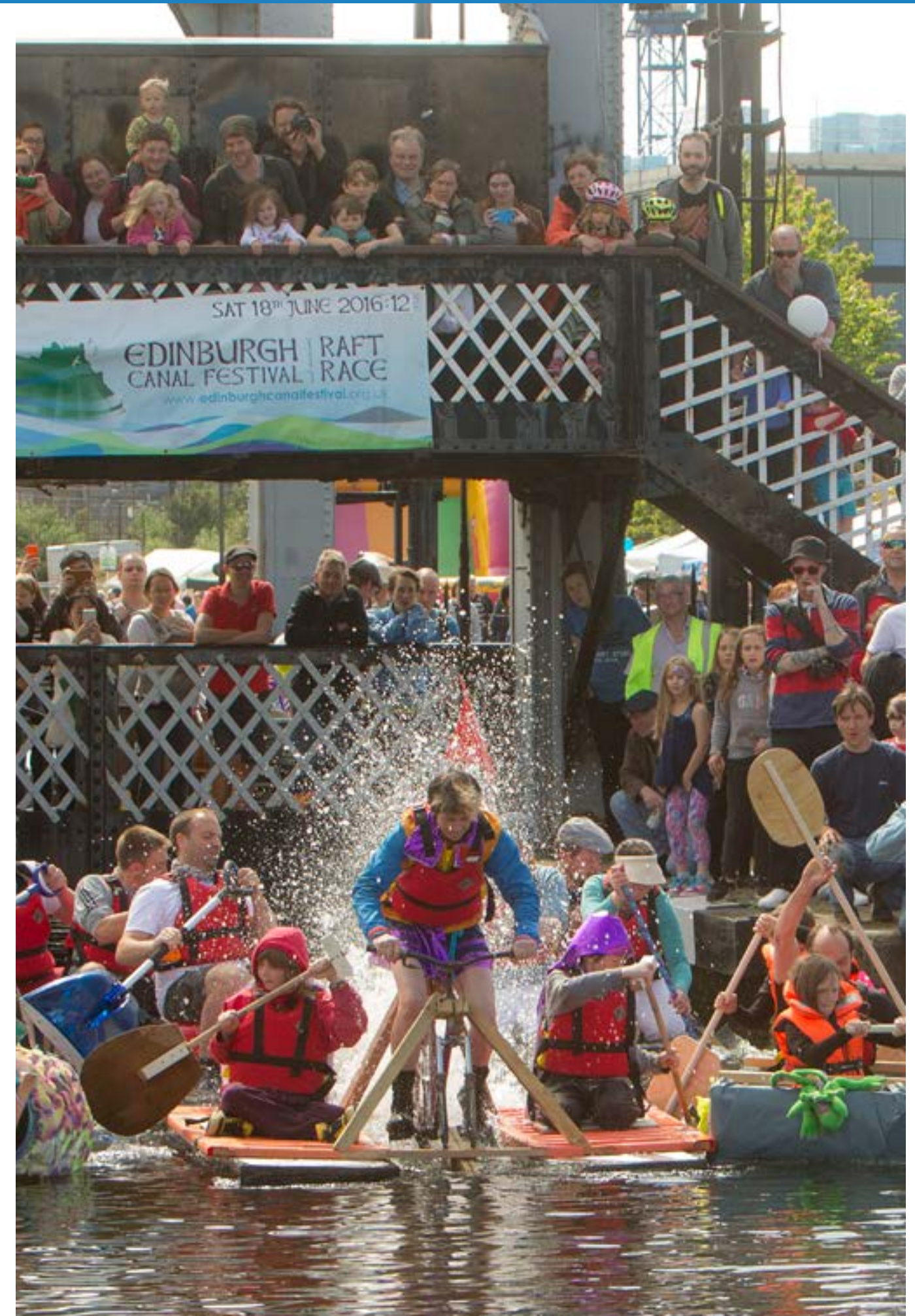
Our people and communities: valued and healthy

People are the bedrock of our industry and the experiences we offer. They are also the foundations of the communities we both work in and with. Investing in our teams and in the communities we are part of is critical to driving productivity, improving health and ensuring businesses and customers remain welcome.

Career choices in the marine tourism industry (whether direct or indirect) provide **outstanding opportunities**: for people to live, learn and work in Scotland's stunning quality environment; to share knowledge with visitors; to give something back to nature through contributing to wildlife records or restoring and enhancing natural habitats; to sustain and revive heritage and traditional crafts; and for Gaelic and local dialect speakers to use their language skills to add value to Scotland's tourism, often to interpret and provide understanding of landscapes.

The very nature of tourism means large parts of the experience are delivered by people who are not part of the formal tourism sector and may never have considered or reflected on the role they play. Indeed some may only experience negative aspects caused by visitor pressures. It is vital, therefore, to articulate and build on **our role in communities** to help manage pressures and guarantee great experiences at every touch point for visitors.

Leadership will unlock this. This theme also covers work to ensure that our leaders are well trained and supported. It also looks to support emerging and future leaders as they develop. **Training** and **skills development** to support the marine tourism sector will be developed through industry initiatives, linking to national programmes, partnerships and increasing the awareness and importance of training through employers.



Strategy into action: Partnership planning and working



The vision we have laid out is ambitious but will only be achieved if we can gather and coordinate the right levels of investment and support. Partnership working and stakeholder engagement will be essential to realise the full potential of each activity and to drive lasting and meaningful change. All of this must take place at community, regional and national levels for us to take the giant strides we are aiming for.

Partnership Plan

The actions identified and taken forward under each theme/objective is where a strategy becomes reality. Identifying the right actions and then ensuring their delivery is therefore essential.

To turn this strategy into reality we will develop a Partnership Plan and link groups of partners to each area or place of activity. The first Partnership Plan will be developed and published by the end of 2020 and will then be refreshed on an annual basis.

Partners will agree work plans to achieve the 14 objectives and hold each other accountable. A lead will be identified, and they will provide periodic updates to the larger group of partners and to the **Cross-Party Group for Recreational Boating and Marine Tourism**.

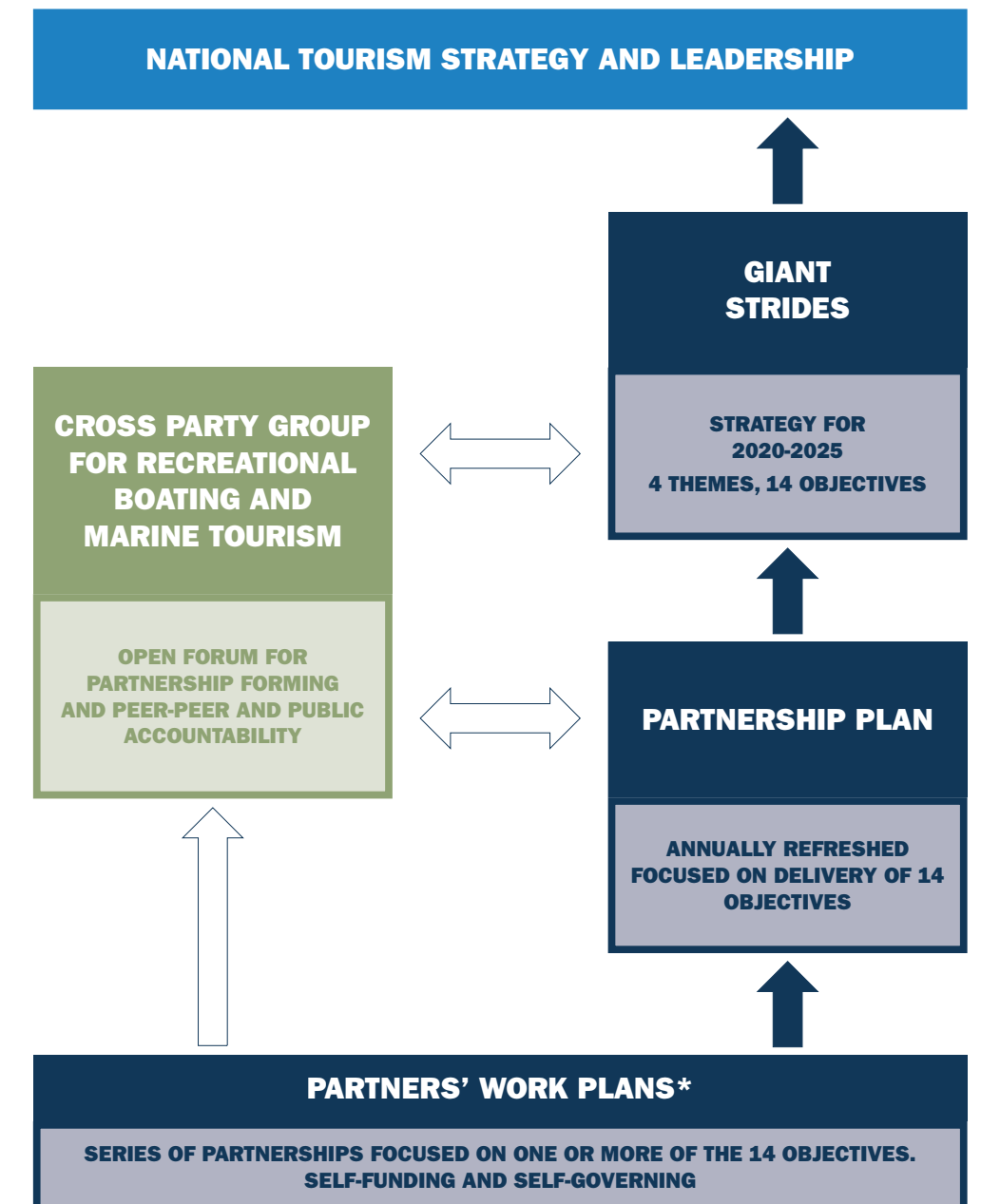
The annual symposium, hosted by the Cross-Party Group, will take on a revised role as the crucible for forging and focusing partnership groups that tackle each of the 4 themes and 14 objectives under the strategy. This is a brand-new approach, reconciling the absence of sector specific resources with supported areas of activities and emerging opportunities.



Tracking and Reporting

Monitoring the progress of the strategy and actions plans will be essential, as too will be keeping the broader sector up to speed with this progress and with other changes that may impact on their activity.

In addition to the annual process to refresh the Partnership Plan, reporting and engagement will continue at a number of other levels. Routine reporting will feed into the National Tourism Strategy and their leadership structures as well as into the quarterly meetings of the Cross Party Group for Recreational Boating and Marine Tourism.



➡ Formal reporting and alignment

↔ Informal public/peer accountability

*Some partnership activity may contribute directly to the National Strategy activity/work plan

What can you do?



Partners

This Strategy rests in our ability to build and develop a broader group of partners that can bring the 4 themes and 14 objectives to life. We need your help, leadership and passion.

If your organisation has a vested interest in our success and thinks it can help to take this sector forward get in touch with the secretary of the Cross Party Group (CPG) for Recreational Boating and Marine Tourism to express your interest and highlight which theme or objective you want to contribute to, support and grow.

Why support and invest?

Manage risk and drive returns. Marine tourism is one of many sectors that are all competing for support and investment. This strategy provides a clear framework to de-risk any potential investment, to assure alignment to national priorities and outcomes and to improve the return on investment by unlocking second and third order impacts and driving greater levels of community buy in.

Multiple impacts in hard to reach communities. Marine tourism is also one of the very few sectors that reaches the most remote and fragile communities in Scotland. It drives the economy but can also drive health, community and environmental impacts of equal consequence and impact.

Benefit from the mega-trends. Marine tourism is also very much “on-trend” and so we are brilliantly placed to meet and exceed the customer needs and expectations – we are already green and will do more, we are already offering adventure and highly personalised experiences and will build on this further, we are already rooted in our communities and help visitors to be more than tourists and we already cater for a huge breadth of visitors and will continue to become ever more accessible.

Businesses, Community Groups and Clubs

If you lead a business, community group or club that operates in the marine tourism sector there are a number of things you can do to benefit from this strategy:

1. Get in touch and stay up to date.

Get in touch with the CPG secretary to receive updates and dates for future meetings and subscribe to the Scottish Tourism Alliance updates. Share your ideas and join in the conversations.

There is also an abundance of support available. Explore the ecosystem of support to get a fuller feeling of what support is available to you. Get in touch with your local development agency; they can always help with this process and have a look at the work of Scotland CAN DO (www.cando.scot).

2. Learn the language and how to navigate the “ecosystem of support”

Getting support is about more than just having a good idea. You need to be able to convey that idea, to make it resonate with potential supporters and to build a team that can help turn it into reality.

The information boxes at the end of this strategy lay out some of the key language and frameworks you need to be familiar with. Explore these and consider how your idea could be described in those terms.

3. Join in

There are a lot of groups that are set up to help you succeed. Have a look at the sector and destination groups that are most relevant to you. These groups also often offer training and support that could help you, your business or some of your team.

4. Make content

The approach VisitScotland and Scotland IS NOW have taken requires lots of great and authentic content. Try building some of your own, tell your story and sell your activities. Engage with their work on social media and consider how you are part of brand Scotland.



The National Performance Framework explained.



The National Performance Framework¹⁷ exists to help align activity in Scotland to achieve 11 National outcomes. These outcomes, from Human Rights and Culture to Environment and the Economy, are supported by 81 indicators and aligned to the 17 UN Sustainable Development Goals.

The Framework is embedded in the Community Empowerment Act and places a requirement on all parts of government to consider outcomes through this lens when carrying out their activities.

Government, local authorities and agencies will therefore be mindful of how a project aligns and contributes to these outcomes and indicators when assessing projects and activities for support and funding.

¹⁷ <https://nationalperformance.gov.scot/national-outcomes>

What are the UN Sustainable Development Goals?



On 1 January 2016, the 17 Sustainable Development Goals (SDGs)¹⁸ of the 2030 Agenda for Sustainable Development — adopted by world leaders in September 2015 at an historic UN Summit — officially came into force. Over the next fifteen years, with these new goals that universally apply to all, countries will mobilize efforts to end all forms of poverty, fight inequalities and tackle climate change, while ensuring that no one is left behind.

¹⁸ <https://www.un.org/sustainabledevelopment/sustainable-development-goals/>

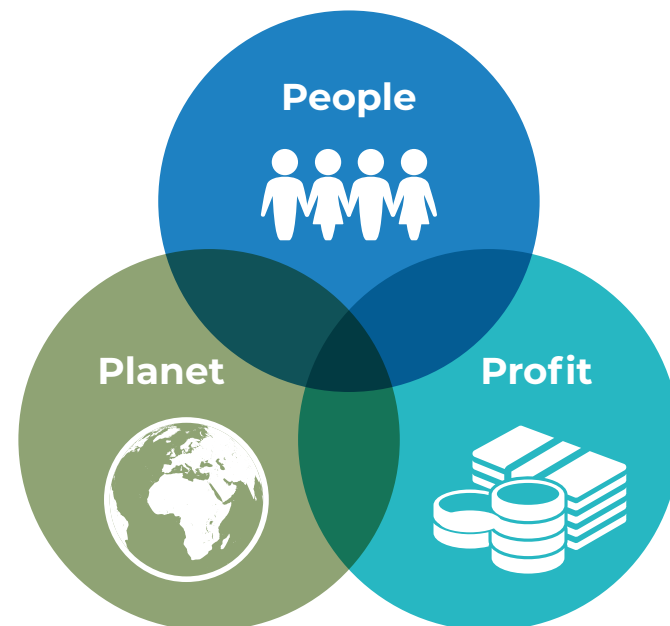
What is natural capital?

Natural capital assets are valuable resources which persist long-term, such as a mountain or a fish population. From those assets people receive a flow of services, such as recreational hikes on the mountain and fish captured for consumption. We can value the benefit to society of those services by estimating what the hikers spent to enable them to walk over the mountain or the profit to the fishermen of bringing the fish into the market. Applying this logic consistently across assets and services enables us to start building accounts of the value provided by nature.

The benefits we receive from nature are predominantly hidden, partial or missing from the nation's - or indeed businesses' - balance sheets. However, by recognising nature as a form of capital and developing accounts of natural capital's contribution to the economy and our well-being, decision-makers can incorporate the environment in future policy planning.¹⁹

Marine tourism is highly reliant on natural capital and more specifically on that capital being maintained or even improved; if for example our coasts and waters become more polluted our experience would be adversely affected and businesses would suffer.

What is sustainability?



Sustainability is a very well used phrase, but it is often seen as being one-dimensional and is about much more than solely environmental issues; it is about balanced, long term success that drives personal, social, environmental and economic benefits.

It can be helpful to think of sustainability in terms of the bottom line. To be successful a business needs to drive a profit – the “bottom line”. But a business that alienates the community it is part of and strips away the natural assets, will not survive for long. It therefore needs to pursue success on all three of these aspects; profit, people and planet. In doing so it will nurture the people and environmental assets on which it depends and drive an economic return at the same time. This is sometimes referred to as the “triple bottom line”.

Some companies use the triple bottom line as a framework to measure and report their successes. Others have extended this further to create a quadruple bottom line which splits ‘people’ into communities and an organisation's workforce, recognising each will have different needs and that both are critical to the organisation's success.

Achieving sustainability for the marine tourism sector is essential; we need to see our human and physical assets valued, cared for and developed at the same time as driving productivity and profit.

What is the “Ecosystem of support”

There are hundreds of organisations who want you, your club, your community and your business to thrive.

These supporters come in all shapes and sizes; from Scottish Enterprise and other government agencies, to networking groups and business competitions. It includes sector groups, destination groups, universities and co-working spaces.

This rich group of supporters is often referred to as an ecosystem of business support.

A lot of work is being done to make this ecosystem come together more effectively, to help people move about it and get to the right support quickly and to improve the quality of the support offered.

Check out www.cando.scot to find out more information.

¹⁹ Source: Scottish natural capital: ecosystem service accounts 2019

Resources

www.findbusinesssupport.gov.scot

The place to start when looking for support from one of the Enterprise and Skills agencies.



www.cando.scot

A directory of support from across the Ecosystem.

#SCOTLAND|SNOW

www.scotland.org

Building Brand Scotland and telling Scotland's story around the world.



<https://scottishtourismalliance.co.uk/>

Making tourism everybody's business.

Plan on a Page

Our Vision: For Scotland to be a world leader in 21st century sustainable marine tourism.

Our Mission: To ensure Scottish marine tourism is sustainable and meets changing consumer, workforce, community and environmental needs and expectations, whilst growing the industry's overall economic contribution to over £0.5 billion by 2025

Our waters: clean and blue

To be stewards of the natural environment we access; investing in natural capital, supporting wildlife and addressing our waste and emissions.

1. Increases in Natural capital value of our seas, waterways and coastline
2. Support wildlife and minimise our impact and that of our visitors
3. Address our waste and emissions including a sector GHG Net-zero plan
4. Infrastructure is developed sensitively, meeting community, environmental and customer needs.

Our experiences: authentic and seamless

To provide authentic and seamless experiences that create special and lasting memories.

5. Product development that meets changing consumer expectations and explores opportunities in the low carbon and circular economy.
6. Visitors are staying for longer, spending more and travelling further.
7. Experiences bring the physical and digital elements of visits together seamlessly.

Our businesses: profitable and sustainable

To support our businesses to be more sustainable, more profitable and more ambitious.

8. We inform and inspire our target market segments.
9. The “ecosystem of support” is optimised for marine tourism businesses
10. Businesses are collaborating within and across sectors to drive innovation and unlock opportunities.

Our people and communities: valued and healthy

To establish marine tourism as a career of first choice, as a force for good across the communities we are part of and to inspire more people to engage in our activities.

11. More people are engaging in waterborne activities more often.
12. Our communities see marine tourism as a force for good and that the sector respects and supports the communities we rely on.
13. That marine tourism is seen as a career of first choice and businesses see people as their priority investment.
14. Businesses, community groups and clubs are well led, and their leaders feel supported.

Image Credits

Cover	Yachting Images/Yachting Life
4-5	Peter Ribbeck
8-9	Scottish Canals
11	Paul Saunders
12	Tony Barr
13	Christine Spreiter
14	Kevin McGlynn
15	Edinburgh Marina Ltd
16	Paul Saunders
18-19	Steve Thomson
23	Sarah Birrell Wild Diamond Watersports, Tiree Yachting Life RYA Scotland Peter Devlin Clyde Muirshiel Regional Park, Castle Semple Centre
24-25	Wild Diamond Watersports, Tiree
37	Scottish Canals
38-39	Marc Turner/RYA Scotland
40	Wild Diamond Watersports, Tiree
44	RYA Scotland

The background features a large, abstract teal graphic on the left side, consisting of several overlapping curved shapes in different shades of teal, ranging from a light turquoise to a dark navy blue. The right side of the page is plain white.

Giant Strides
A Second Strategic Framework
For Scotland's Marine
Tourism Sector

This Strategy has been developed and funded by British Marine Scotland, RYA Scotland and Scottish Canals and includes the results of widespread consultation with the members of the Cross-Party Group for Recreational Boating and Marine Tourism, the Scottish leisure marine trade and other stakeholders.

For more information, please email
admin@ryascotland.org.uk
scotland@britishmarine.co.uk