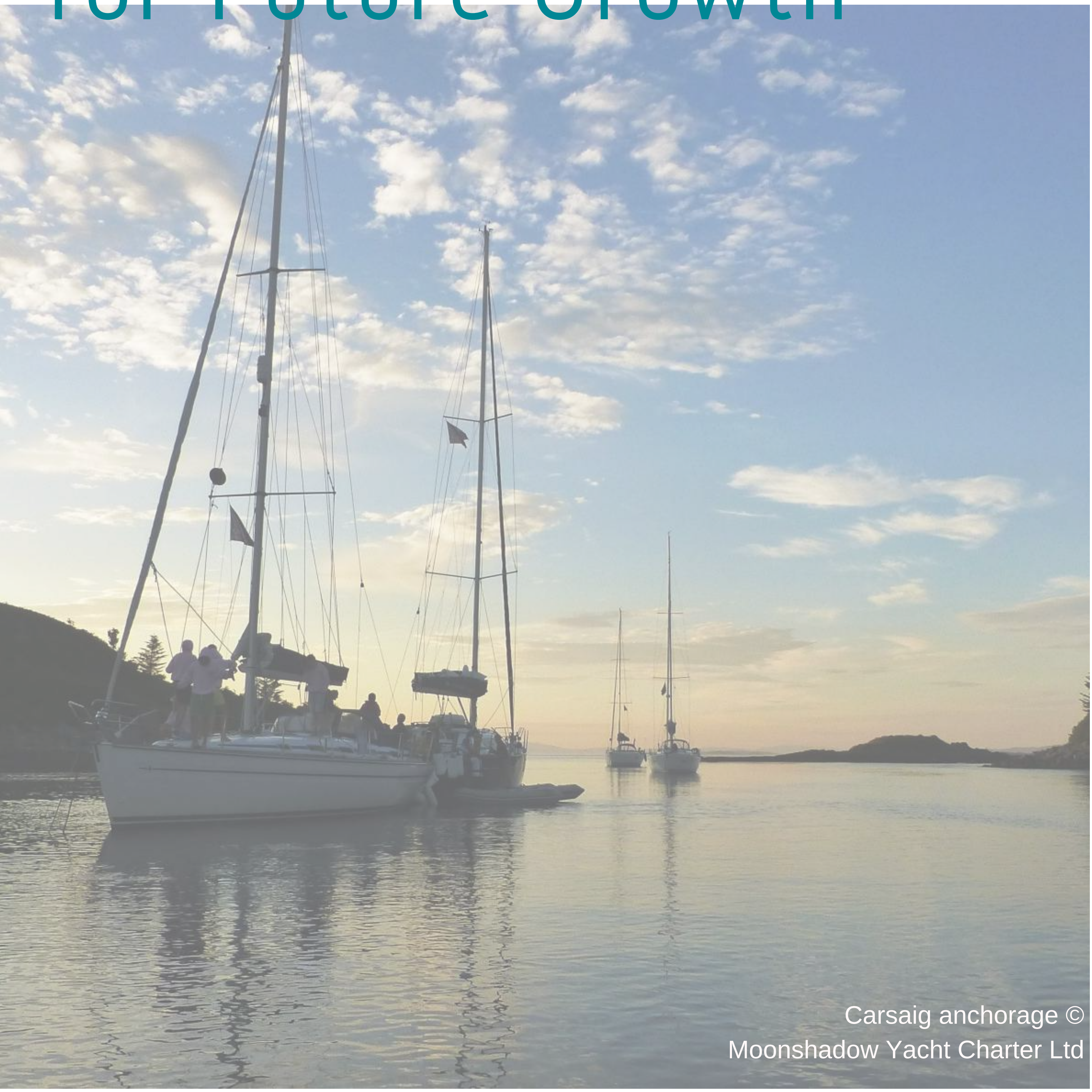
Awakening the Giant
Marine Tourism Strategy
2015 – 2020

Infrastructure for Future Growth



Carsaig anchorage © Moonshadow Yacht Charter Ltd

Introduction


Sound of Mull © Moonshadow Yacht Charter Ltd

The Awakening the Giant Marine 2015-2020 strategy sets out an ambition for growth of Marine Tourism from £360m to £450m. Sailing is identified as the largest of the activities within the sector targeted to grow from £105m to £145m.

Key to success lies in the development of adequate facilities to accommodate growth, a more discerning customer and changing leisure patterns.

A key strand within the Strategy Delivery Plan is to promote the introduction of new facilities. Such new development is critical for the growth of the sector and its contribution to the Scottish economy, much of which happens in fragile rural communities.

In 2016 the Marine Tourism Development Group (MTDG), the group charged with delivery of the Strategy, commissioned an economic impact assessment report. Published in 2017 the report outlines the potential of sailing values to reach £167m by 2020 whilst supporting 5,500 jobs. To do this it was identified that an additional 3,000 berthing facilities were required to fully realise that potential demand.

The following outlines the process undertaken by the MTDG in assessing and identifying key locations that are seen as drivers for growth and identifying key actions required to realise the potential.

Process and background

In 2016, funded by Scottish Canals, Highland and Islands Enterprise (HIE) and The Crown Estate, the MTDG commissioned a research project with the following brief: *The overall objective of this study is to provide an update of the current economic contribution the sailing tourism sector makes to the Scottish Economy and to provide an independent analysis of the potential there is within the sector to grow GVA impact. The update should be directly related to the Scottish Enterprise Sailing Tourism in Scotland ('the 2010 Report')*
EKOS secured the commission and reported in January 2017. The full report is available to download at: www.scottishtourismalliance.co.uk/page/marine/

The key findings of the report are summarised as follows:

The total current supply is approximately 15,700 berths (up 24%)

13,500 of which are resident berths (up 23%)

2,200 of which are visitor berths (up 32%)

95% Occupancy of resident berths which is the same level as in 2009, thus demand has kept pace with supply.

The proportion of non-Scottish residents has increased from 14% in 2009 to 22% in 2016.

The report set two possible scenarios for growth and commented as follows:

The current value of the market is £130 million (£39m output from non-Scottish residents).

Under Scenario A, development of the market could increase by £30.5 million to £160.7 million (£52.6m from non-Scottish residents).

Scenario B would potentially see increases of £36.9m to £167.1m. Therefore, allowing for displacement, gives a potential net additional increase in output of £18.7 million under Scenario A (£13.6m for Non-Scottish Residents) and £22.8m under Scenario B (£16.8m for Non-Scottish Residents).

In assessing facilities and their role in the sector the following industry assumptions were maintained throughout the report, namely:

1. Sail from: those sailing facilities that have a focus of resident berths/moorings;
2. Sail to: sailing destinations for visiting yachts; and
3. Sail through: strategic staging posts for yachts to stop at, whilst travelling both to and from sailing destinations.

The consumer survey element of the study carried out by EKOS identified that boat owners on average travel 25 to 30 nautical miles on a day's sail.
The consumer survey also noted that:

Safe, well protected berthing or anchorages and good shore access to Scottish island locations, in particular, were seen to be of paramount importance in choosing a destination to berth at.

Boat owners are primarily motivated to use a destination because of its safe berthing rather than the provision of shore-side facilities e.g. toilets, showers, and fuel or refreshment facilities.

The report also concluded: There is no doubt that those destinations close to sail from hubs that are viewed as visitor destinations and provide a good range of ancillary facilities are visited more often and the visitor expenditure is very welcome, in what can be rather fragile rural communities.

Assessing the potential

Each of the strategic locations was scored against the following criteria (in terms of future potential):

1. Resident market demand
2. Visitor market demand
3. Strategically important
4. Links to local economy
5. Catalytic effect

In addition to the above the MTDG added two further scoring criteria.

6. Difficulty: an assessment of the geo-physical challenges associated with a location and indication towards the resultant potential costs associated in making a location viable for step ashore or swinging mooring facilities.

7. National Economic Impact: Taking a holistic view to the scale of economic impact that would potentially follow on from a scale of development that could maximise the potential of the location.

Locations were scored on a basis of 1 (low) to 5 (high).
Note that Difficulty as scored 1 (Highly challenging) 5 (Less challenging).

Further to the scoring above (on page 4) each score had a weighting multiplier applied, as follows:

Criteria	Weighting
Residential	1.00
Visitor	1.00
Local Economic impacts	1.25
Catalytic potential	1.50
National Strategic	2.00
Difficulty	1.00
National Economic impact	3.00

In further consideration, it was agreed that the MTDG required to remain at a strategic level and agreed the following three levels. It was also agreed that the MTDG would assess locations that fell into level 1 and 2 only.

This due to resource, available time and wishing to remain working at a strategic level:

1. National: Big impact game changers. (appendix 1)
2. Regional: Smaller economic impacts but vital stepping stones to connect coastlines and larger nationally important hubs. (appendix 2)
3. Local: Seen as important locations to build sailing but likely to be best served by community and locally led initiatives. (appendix 3)

The resultant scoring process allowed the MTDG members to draft a table of scores.

See appendices 1, 2 and 3

Forth Rail Bridge © VisitScotland / Scottish Viewpoint

Next Steps

- The MTDG will present to the Scottish Government a priority case for investment in the marine tourism sector.
- The draft scored outcomes are currently being discussed with; industry, Scottish Government, Cross Party Group on Recreational Boating, local authorities, enterprise agencies, Growth Deal partnerships, destination groups, community groups and private investors.
- The MTDG welcomes dialogue with developers who see their project sitting within level 1 and level 2, or feel that, having carried out an assessment using the above scoring criteria see their project in level 3 and view that their project may fit in at level 1 or 2.
- Working with representatives from Enterprise and Scottish Government further economic impact analysis is being carried out to identify the regional fit.
- The MTDG invite comment from interested parties. Comments should be fed back to Project Manager Alan Rankin at alan.rankin@coigachconsulting.com


Ready to sheet in the main
© Eda Frandsen Sailing

Appendix 1

Strategic and Regional Marine Developments
Level 1: National

	Scoring									Weighted Outcome							
Location	Residential	Visitor	Local economic impact	Catalytic impact on wider area	National Strategic Importance	Difficulty	Future economic impact	Total		Residential	Visitor	Local economic impact	Catalytic impact on wider area	National Strategic Importance	Difficulty	Future economic impact	Total
	1 to 5	1 to 5	1 to 5	1 to 5	1 to 5	l hard 5 eas	1 to 5			1	1	1.25	1.5	2	1	3	
Dundee	4	4	4	4	5	5	5	31		4	4	5	6	10	5	15	49
Ayrshire Co	5	5	5	4	4	3	4	30		5	5	6.25	6	8	3	12	45
Tobermory	2	5	5	4	5	4	4	29		2	5	6.25	6	10	4	12	45
Portree	3	5	5	4	5	2	4	28		3	5	6.25	6	10	2	12	44
Fort Willia	4	5	4	3	5	3	4	28		4	5	5	4.5	10	3	12	44
Granton	4	4	4	3	5	4	4	28		4	4	5	4.5	10	4	12	44
Port Edgar	5	4	4	3	5	1	4	26		5	4	5	4.5	10	1	12	42
Stranraer	4	3	5	4	4	2	4	26		4	3	6.25	6	8	2	12	41
Corpach	3	4	3	3	5	3	4	25		3	4	3.75	4.5	10	3	12	40
Kyle of Loc	3	4	4	4	4	2	4	25		3	4	5	6	8	2	12	40
Leith 2	4	4	3	3	5	1	4	24		4	4	3.75	4.5	10	1	12	39

Note 1: Ayrshire Coast including several marina and marine tourism developments included in Ayrshire Growth deal proposals.
Note 2: Assume a cluster approach on the Forth: Granton, Leith & Port Edgar with included due to value it could bring to waterfront and East coast

Appendix 2

Strategic & Regional Marine Developments
Level 2: Regional

	Scoring								Weighted Outcome							
Location	Residential	Visitor	Local economic impact	Catalytic impact on wider area	National Strategic Importance	Difficulty	Future economic impact	Total	Residential	Visitor	Local economic impact	Catalytic impact on wider area	National Strategic Importance	Difficulty	Future economic impact	Total
	1 to 5	1 to 5	1 to 5	1 to 5	1 to 5	1 hard 5 eas	1 to 5		1	1	1.25	1.5	2	1	3	
Lamlash	3	5	5	3	2	4	4	26	3	5	6.25	4.5	4	4	12	39
Stornoway	3	4	4	3	4	2	4	24	3	4	5	4.5	8	2	12	39
Kelpie Hub	4	3	4	4	3	2	4	24	4	3	5	6	6	2	12	38
Lerwick Harbo	4	4	3	2	4	2	4	23	4	4	3.75	3	8	2	12	37
Tarbert Loch F	3	4	4	3	4	3	3	24	3	4	5	4.5	8	3	9	37
Gairloch	2	3	3	3	4	3	4	22	2	3	3.75	4.5	8	3	12	36
Inverness	4	4	3	3	5	1	3	23	4	4	3.75	4.5	10	1	9	36
Loch Ness	4	4	3	3	4	3	3	24	4	4	3.75	4.5	8	3	9	36
Buckie	4	4	3	2	4	4	3	24	4	4	3.75	3	8	4	9	36
Loch Eatharna	1	4	3	3	3	4	4	22	1	4	3.75	4.5	6	4	12	35
Peterhead	3	4	3	3	4	3	3	23	3	4	3.75	4.5	8	3	9	35
Lochinver	3	4	3	3	3	4	3	23	3	4	3.75	4.5	6	4	9	34
Plockton	3	3	4	3	3	3	3	22	3	3	5	4.5	6	3	9	34
Gigha	2	4	3	3	3	3	3	21	2	4	3.75	4.5	6	3	9	32
Mallaig	3	4	3	3	3	2	3	21	3	4	3.75	4.5	6	2	9	32
Arisaig	3	3	3	3	3	3	3	21	3	3	3.75	4.5	6	3	9	32
Stromness	4	3	3	2	3	3	3	21	4	3	3.75	3	6	3	9	32
Bowling	3	3	3	3	3	2	3	20	3	3	3.75	4.5	6	2	9	31
Kirkwall	3	3	3	2	3	3	3	20	3	3	3.75	3	6	3	9	31
Nairn	3	3	3	2	3	3	3	20	3	3	3.75	3	6	3	9	31
Dunvegan	2	4	3	2	3	2	3	19	2	4	3.75	3	6	2	9	30
Castlebay	2	3	3	2	3	3	3	19	2	3	3.75	3	6	3	9	30
Aberdeen	3	3	2	2	4	1	3	18	3	3	2.5	3	8	1	9	30
Loch Aline	1	3	3	3	2	4	3	19	1	3	3.75	4.5	4	4	9	29
Linnhe Marin	3	3	2	2	2	4	3	19	3	3	2.5	3	4	4	9	29
Fraserburgh	2	3	2	2	3	3	3	18	2	3	2.5	3	6	3	9	29
Scallaway	3	3	3	3	3	2	2	19	3	3	3.75	4.5	6	2	6	28
Lossiemouth	3	3	3	1	3	2	3	18	3	3	3.75	1.5	6	2	9	28
Fort Augustus	2	3	3	2	3	1	3	17	2	3	3.75	3	6	1	9	28
Dochgarroch	3	3	3	2	2	2	3	18	3	3	3.75	3	4	2	9	28
Craighouse Ju	1	4	3	2	3	2	2	17	1	4	3.75	3	6	2	6	26
Oban	4	4	3	3	5	2	5	26	4	4	3.75	4.5	10	2	15	43
Campbeltown	3	4	4	3	4	2	3	23	3	4	5	4.5	8	2	9	36

Note 1: essentially 1 development with a decision to be made between Corpach at the entrance to the canal and the regeneration benefits of siting in Fort William
Note 2: Assume 1 development with the advantages to be weighed between Granton & Leith & Port Edgar
Note 3: Ayrshire Coast including Millport, several marina and marine tourism developments included in Ayrshire Growth deal proposals. Believe MTDG should support the Growth deal rather than single out localities and conflict

Appendix 3

Local Marine Developments
Level 3: Local

Ardrishaig
Brodick
Millport
Lochranza
Kyles of Bute
Greenock/Glasgow

Portpatrick
Kipford
Kirkcudbright

Crinan
Port Ellan
Colonsay

Craignure
Ardfern
Croavbh Haven

Loch Creran
Kingairloch

Ulva/Geometra
Loch Eatharna Coll
Gott Bay Tiree

Rum
Muick
Canna
Eigg
Arisaig

Broadford
Staffin
Uig
Kyleakin
Isle Oransay
Carbost
Armadale

Sandwick
Others
Lochboisdale

Kinlochbervie
Loch Eribol
Ullapool

Pierwall
Vidlin
Balta Sound
Garths Voe

Papa Stour
Hamnavoe
Lerwick Gremista

Clachnaharry
Macduff
Cromarty
Fraserburgh
Whitehills
Dornoch
Portsoy
Sandhaven

Montrose
St Andrews
Stonehaven
Peterhead
Arbroath
Tayport

Dunbar
Crail
Musselburgh
Port Edgar
Eyemouth
Anstruther

Awakening the Giant
Marine Tourism
Strategy 2015 – 2020

Infrastructure
for Future Growth

Awakening the Giant Marine Tourism Strategy 2015 – 2020
is aligned with the national tourism strategy, Tourism Scotland 2020,