

AWAKENING THE GIANT MARINE TOURISM STRATEGY REVIEW

A review of the Strategy, status of Action Plan projects and assessment of
the role of the MTDG and ongoing delivery of the Strategy

February 2018

Marine Tourism
Development Group

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1 Introduction

The strategy titled “**Awakening the Giant**” came about as a response by industry as to the need for a coherent industry led strategy to maximise the potential of Marine Tourism in Scotland. Following input from industry and support from the public sector the resulting Strategy was launched by Minister for Energy, Business & Tourism, Fergus Ewing MSP at Scottish Tourism Week 2015 in March.

The five-year strategy outlines the intention to bring even more visitors to the coastlines and canals of Scotland and aims to boost Scotland’s reputation as a world class marine tourism destination by focussing on three key themes of:

- **Providing Authentic Experiences**
- **Improving the Customer Journey**
- **Building our Capabilities**

The strategy set a target to grow the total value of the sector by 25%, from £360 million to £450 million, by 2020 and within that the main sector of boating from £105m to £145m.

Whilst sailing sits at the core of the strategy and is the focus of initial activities, the strategy also invites other marine tourism stakeholders – from scuba diving and water skiing to sea angling and wildlife watching – to get involved and realise the full potential of the sector.

‘Awakening the Giant’ was led by industry and developed in consultation with a wide range of stakeholders including: British Marine Federation Scotland, Sail Scotland, VisitScotland, Scottish Canals, The Crown Estate, Highlands and Islands Enterprise, and Royal Yachting Association Scotland.

2 Marine Tourism Standing

The aims, ambitions and increased awareness set out within the Strategy are now embedded within government, enterprise, local authority, public and international development agency strategies and agendas. Since the 2015 launch there is a greatly increased understanding and awareness of the potential of Marine Tourism across private sector operators, destination groups and the wider tourism industry.

The standing of Marine Tourism as a sector to enrich rural economies, create employment, celebrate and showcase Scotland’s coastal assets has contributed to and influenced the announcement of 2020 Themed Year being that of Coast and Water. The Themed Year will bring national attention to Scotland’s marine tourism assets, economies and opportunities the 14 sectors identified with the Awakening the Giant Strategy bring to the Scottish economy.

The Strategy is on government agendas, central to area Growth Deal developments such as; Ayrshire Coast, Stirling and Tay Cities and sits central to regeneration projects in locations such as Ardrossan, Dundee and Stranraer.

Marine Tourism is now an integral element in the development of local area tourism development plans exempling: Forth Bridges, Dumfries and Galloway, Argyll and the Isles, Fort William (OCUK), Outer Hebrides and North Ayrshire Making Waves plan. This is further

evidenced by the West Coast Destination Partnership Project that will see 18 destination groups seek to identify growth opportunities from Marine Tourism.

Behind the strategic success the reach into wider 14 sectors identified within the Strategy remains fragmented. There remains a difficulty in reaching smaller non-association/trade led sectors.

3 Awakening the Giant – the next steps

The delivery of the industry led Strategy has come to a period where reflection on progress is appropriate. The Project Manager is leaving post and 2020 Year of Coast and Water allows the MTDG to assess the current position and how best to take forward the Strategy.

Awakening the Giant set out influence strategic thinking and action. Arguably that has been achieved as described above. There remains the workstreams currently adopted by the MTDG and how they can be developed so as to support future growth. The MTDG identified key projects that could support tangible change of attitudes, increased activities and investment in terms of: Events, Marketing, Skills, Infrastructure, Environment, Awareness and Evaluation. A resulting set of Projects were identified and are detailed on page 7.

The progress of delivery across the Projects has been varied in terms of achievement and resulting actions. Each Project in turn had an identified supporting resource that the Champion could turn to. Each Project has an identified delivery strategy however due to limited resources within organisations and within the MTDG there have been a varying level of achievements and delivery across the Projects. Section 6 outlines the actions undertaken and where each project sits in terms of progress and action.

There now is an opportunity to reassess the delivery mechanisms around each project. The following has been identified as a way forward for the MTDG to consider.

Where appropriate the Project Delivery Plan is adopted by a lead agency and in effect absorbed within their wider tourism remit.

There are number of benefits that will arise from this approach:

- Marine Tourism is fully integrated into national agency development and action plans.
- Marine Tourism is recognised as a core tourism sector.
- Reduces the reliance upon under resourced membership bodies or organisations.
- Potentially more resource and increases speed of delivery.

The recommendation to the MTDG is as follows:

- **Events**
 - EventScotland adopt the Marine Tourism Events Plan and develop marine tourism events as a core target sector and core to the development of the 2020 themed year.
 - Options to establish a new industry-based support group to work with ES.
 - RYAS, SS and event organisers continue to develop local, regional and national based events with reference to Event Scotland for appropriate support and engagement.

- **Skills**
 - Skills Development Scotland adopt the Marine Skills Pathway Plan within the wider Tourism Skills Investment Plan.
 - BMS continue to champion the technical skills programme appropriate to their membership demands.
- **Marketing**
 - SailScotland and VisitScotland continue to deliver campaigns aimed at growing Marine Tourism awareness, activities and spend. This to be done with specific focus on developing compelling campaigns to support 2020 Year of Coast and Water.
- **Infrastructure**
 - The Key Location Summary report (unpublished) will, with supporting explanation and advice be passed to VisitScotland to inform the ongoing development of the Tourism Framework for Investment. The document is based on economic study (Ekos) and industry input so therefore represents an advised resource on the matter of strategic developments to support future growth.
- **Environment**
 - A joint approach to identifying the most appropriate way forward for the wider MT 14 sector interests to be discussed by; RYAS, BMS, SNH, WiSE and The Green Blue.
 - Matter to be tabled at CPG for broad input.
- **Evaluation**
 - VisitScotland Insights team adopt the agreed MT questions within the emerging Business Barometer project so bringing MT into mainstream analysis both at sector and destination level.
- **2020**
 - STA to contribute to and shaping the 2020 Themed Year along with invited parties from the private sector.

4 Marine Tourism Development Group

4.1 Marine Tourism Development Group

The Marine Tourism Development Group (MTDG) was formed in 2014 with a core remit to act in a strategic overseeing capacity with the delivery of the strategy through industry and where possible supported by the public sector.

In such a strategic role the MTDG would focus on recommended actions that are measured and those that have a direct bearing on creating and delivering a quality Marine Tourism Customer Experience and growing the Marine Tourism visitor spend.

To aid this process an independent chair was agreed with this function being served through the Scottish Tourism Alliance. In addition, a Project Manager was appointed to support the MTDG members and act at a strategic level with stakeholders in the sector.

The MTDG was also tasked to drive collaboration and alignment across the marine tourism sector. Whilst it was principally charged with leading an industry-led strategy the group also performs a number of other inter-related leadership functions. These include:

- Strategic - to articulate a vision for the sector; develop, implement and monitor an industry strategy including the setting of industry growth aspirations and measuring performance.
- Tactical - to help manage immediate opportunities and challenges.
- Communication and engagement – with wider industry; within sub-sectors and across the marine tourism sector.
- Collaborative - to foster networking and pursue alignment with collaborative working across industry, academia, and other public-sector agencies.
- Advisory – with deep current knowledge of the sector; a global perspective; and significant input to the evidence base.

4.2 MTDG Members

The membership of the MTDG has remained relatively stable throughout the period. The Clyde Marine Partnership were original members but did not attend meetings or respond to correspondence and BMS moved from three reps to one. In late 2017 Colin Speedie of the WiSE organisation was invited to the group to help build a broader view around the environmental agenda.

- Daniel Steel, Sail Scotland
- David Adams McGilp, VisitScotland
- James Allan, RYA Scotland
- Leon Thompson, VisitScotland
- Paul Bancks, Crown Estate
- Richard Miller, Scottish Canals
- Scottish Development International
- Simon Limb, British Marine Scotland
- Steven Dott, Highlands & Islands Enterprise
- Paul Wise , WiSE organisation
- Marc Crothall, Scottish Tourism Alliance (Chair)
- Alan Rankin, Scottish Tourism Alliance (Project Manager)

4.3 Terms of Reference

As work was underway in delivery of the Action Plan it became apparent that members of the Group required a framework within which to work. This was the case as statements, press briefings and lobbying conversations were happening out with the agreement or knowledge of the wider MTDG.

4.4 Project Manager

A Project Manager was appointed in October 2016 with the role expectations being:

Primary Role to facilitate, co-ordinate and support the strategic delivery, by industry and public-sector partners that make up the MTDG, of the Scottish Marine Tourism Strategy and prioritised Action Plan;

- Provide strategic guidance to the MTDG to finalise the Action Plan process and, progress the development of an effective monitoring and reporting framework.
- Represent and promote an increased awareness of the role, function and priorities of SMTDG partners at Industry events and meetings as required.
- Provide effective co-ordination of communications to Industry, public sector and key stakeholders to increase opportunities for alignment of wider activity to deliver Marine Strategy

The post is funded by HIE and contracted through the STA reporting to the MTDG chair. The post was resourced 2 ½ days per month Sept 2016 – March 2017 and 3 ½ days per month through to August 2018. In December 2017 the Project Manager tendered his resignation and left the post 28th February 2018.

5 Strategy Action Plan

The development of the MTDG report for the Symposium on 20th November 2016 revealed there was not a fully shared and co-ordinated approach to the delivery of the Awakening the Giant strategy, with at times contradictory statements from within the group regarding priorities and approach towards the delivery of key elements within the strategy.

This was further highlighted by the need to issue a robust Terms of Reference and subsequent concerns around a non-sanctioned press report on the Symposium. Concerns were also raised about the progress and direction the MTDG was taking.

It was apparent that some additional work was required to bring stability and understanding to the group and importantly develop a delivery plan that brought a shared commitment and stakeholder alignment.

The three strategic Themes of: **Providing Authentic Experiences, Improving the Customer Journey and Building our Capabilities** had at this time an Action Plan contained 11 Long Term Aims, 39 Key Actions with a following 117 actions.

Given the restricted resources and desire to operate at a strategic level the MTDG agreed in February 2016 to redesign the Action Plan to a more simplified and project led format, each tied back to the Three Themes. This format more likely to produce identifiable projects that may in turn attract funding.

It was agreed that each project should attract a Champion, this being a member of the MTDG that was best suited/skilled to lead the Project. Potential supportive resourcing was also identified and agreed as follows.

Awakening the Giant Action Plan

| Theme | Lead Project | Comment | Champion* | Resourcing | Priority |
|---------------------------------|---|---|---------------|------------|----------|
| Providing Authentic Experiences | Marine Tourism Scotland Events Plan | Co-ordinated plan across all sectors so placing Scotland as the premiere marine events destination in Europe | EventScotland | ES + MTDG | 2016/17 |
| | 'Themed routes' and packages shop window | Promotion of existing marine tourism routes and development of packaged products with marine content | SailScotland | SS/VS/SC | 2016/17 |
| | Marine Digital Gateways | Signposting the customer to a network of quality rich in content digital information channels (www, social, advisory) | SailScotland | SS/VS | 2017/18 |
| Improving the Customer Journey | Customer feedback scheme | Marine focussed feedback scheme adopted across sectors to establish net promoter score and information on customer experiences | SailScotland | SS/VS | 2017/18 |
| | Marine Tourism Skills Pathway Plan | Attracting, developing and retaining staff in the industry, building customer service levels, skills, capacities and competencies | BMS | HIE/SE/SDS | 2017/18 |
| Building our Capabilities | Marine Tourism Investment Framework | One cohesive plan advising future investment based upon asset surveys and input from industry and users (facility, infrastructure, digital) | BMS | HIE/CE/SC | 2016/17 |
| | Scottish Marine Tourism Convention | Regular event to bring together the industry and international best practice | MTDG | All | 2016 |
| | Marketing Interest Group | Collaborative group supporting campaign planning and industry participation in marketing initiatives | SailScotland | SS/VS/SDI | 2016/17 |
| | Environmental Charter | A co-ordinated approach across sectors to adopt and promote the most appropriate 'green' schemes so enhancing the reputation and credentials of the marine tourism industry | BMS | VS | 2017/18 |
| | Marine Business Monitor | Capturing live and up to date information that has local and national relevance to business | BMS | HIE/SE | 2017/18 |

6 Key Project Status

The following is a summary statement on actions within the Action Plan; Green – progressing. Amber – Requiring support. Red – behind plan. White - abandoned

| Theme | Status | Comment | Lead | Current Status |
|---------------------------------|--|---|------------|--|
| Providing Authentic Experiences | Marine Tourism Scotland Events Plan | Co-ordinated plan across all sectors so placing Scotland as the premiere marine events destination in Europe | ES | <ol style="list-style-type: none"> 1. Development approach in place 2. ES pursuing large BID for Events with noted interests with organisers 3. MTDG to consider future of working group and change in personnel at ES 4. MTDG engaging with Scot Govt. on shaping of 2020 structures |
| | 'Themed routes' and packages shop window | Promotion of existing marine tourism routes and development of packaged products with marine content | SS | <ol style="list-style-type: none"> 1. SS secured VS Growth Funding 2017-2018 2. SS attending series of international boat shows 3. SS delivering programmes of digital and print marketing to overseas markets 4. SS liaising with SDS, HIE and VS on development of overseas markets |
| | Marketing Interest Group | Collaborative group supporting campaign planning and industry participation in marketing initiatives | SS | <ol style="list-style-type: none"> 5. HIE led project bringing together 18 west coast destinations to identify MT opportunities and future product development potential |
| | Marine Digital Gateways | Signposting the customer to a network of quality rich in content digital information channels (www, social, advisory) | SS | <ol style="list-style-type: none"> 6. Closer links between VS and SS with higher profile on VS.com required |
| Improving the Customer Journey | Customer feedback scheme | Marine focussed feedback scheme adopted across sectors to establish net promoter score and information on customer experiences | MTDG | <ol style="list-style-type: none"> 1. MTDG agreed to put on hold until agreement reached around any form of national feedback scheme |
| | Marine Tourism Skills Pathway Plan | Attracting, developing and retaining staff in the industry, building customer service levels, skills, capacities and competencies | BMS/MT DG | <ol style="list-style-type: none"> 1. Skills Pathway Plan developed in partnership with SDS - MTDG to provide feedback on draft engagement plan 2. Ongoing delivery of BMS membership orientated training events 3. MTDG to consider resource required to implement Plan |
| Building our Capabilities | Marine Tourism Investment Framework | One cohesive plan advising future investment based upon asset surveys and input from industry and users (facility, infrastructure, digital) | BMS/MT DG | <ol style="list-style-type: none"> 1. EKOS growth report identifying economic growth potential 2017 2. Developed key location report but no agreement yet reached on next steps 3. 'New developments' monitor to be finalised 4. Cross check between location review and VS Framework for Investment 5. Influenced Growth Deal, local authorities and area tourism strategies 6. MTDG at stalemate on next steps with BMS seeking delivery funding support |
| | Scottish Marine Tourism Convention | Regular event to bring together the industry and international best practice | MTDG | <ol style="list-style-type: none"> 1. SS delivering annual MT conferences 2. MTDG debated 2020 signature event to promote sector |
| | Environmental Charter | A co-ordinated approach across sectors to adopt and promote the most appropriate 'green' schemes so enhancing the reputation and credentials of the marine tourism industry | BMS | <ol style="list-style-type: none"> 1. Green Blue and WISE scheme promoted as elected schemes. 2. Concerns over visibility, direction and viability of Green Blue with BMS to report. 3. MTDG to assess if Green Blue is fit for purpose for Scotland |
| | Marine Business Monitor | Capturing live and up to date information that has local and national relevance to business | BMS /MT DG | <ol style="list-style-type: none"> 1. Marine Barometer framework designed. 2. Delay from MTDG assessing questions for inclusion in pilot survey agreed in partnership with VS Insights team new Destination Business barometer project. |
| | | | | |

6.1 Marine Tourism Scotland Events Plan

The Events working group of: Stuart Turner ES, Jenny Stevenson ES, James Allan RYAS, Daniel Steele SS and Alan Rankin STA agreed to pursue the creation of a Marine Tourism Events Plan that can sit between Scotland the Perfect Stage and the Awakening the Giant National strategies.

The progress has not been as fast as had been hoped. It has proved hard to maintain momentum with the working group, in part, due to resources available within EventScotland.

The working group agreed the following format of approach:

1. **Marine Event Assets:** Produced ongoing piece of work around the marine (sailing) assets opportunity in Scotland but have a call to action on this and other marine assets (smaller events e.g. surfing, kayaking, nature)
2. **Marine Events:** A list of marine events that already exist in Scotland in order to map out and develop so that they have visibility through VS website
3. **Bid for Events:** Scoping out events to bring into Scotland as large scale and high profile.
4. **Year of Coast and Water:** how to maximise the themed year for marine tourism-based events.

EventScotland provided the following summary of potential Bid for Events:

- Clipper – concerns as to value for money
- Volvo Series Volvo Round the World (VRTW) – expression of interest has been lodged with VRTW.
- Extreme Series – cost of hosting is high but does offer a good event. ES completed due diligence in regard to media figures & negotiating event cost
- Powerboating – now out of UK completely. US focused.
- Concern over Sailing Club resourcing and their ability to operate large events.

EventScotland provided the following summary around Year of Coast and Waters 2020

- No announcement on budget yet although will be an increase on current budget of 500K
- Desire for headline event for the themed years. Govt would support any mega events through separate budget channels.
- Destinations should focus on community events that can grow or niche events that will attract a global market.
- ES are pushing for confirmation of funding to allow for events schedule to be available by the end of 2018, this would allow SS to promote it from January 2019
- MTDG should make representation to Scot Govt through Mhairi Christie Group to seek representation at the table when 2020 is being scoped out.

In addition, the group noted there are a number of home grown events like West Highland Week that could be developed further but that would depend on the ambitions of the organisers.

6.2 'Themed routes' and packages shop window and Marine Digital Gateways

SailScotland secured £34k from the VisitScotland Growth Fund and SCDI support to deliver a targeted marketing campaigns to promote Scotland as a sailing destination. This has supported SailScotland attend international boat shows and the delivery of social media and digital content campaigns have reached hundreds of thousands of potential visitors.

SailScotland has successfully delivered two annual Marine Tourism Conferences linking each with the national Scottish Tourism Week. The linking with STW has secured additional recognition and political recognition of the event, agenda and sector.

Marine Tourism conference in Gothenburg in October. Daniel Steel presented resent to the conference along with Kirstin from Tarbert Harbour Authority to demonstrate how public and private sector can collaborate and work together. The Swedish Guest Harbour Association will visit Scotland next year dovetailing with Scottish Tourism Week and The Marine Tourism conference event.

Whilst SailScotland has successfully delivered the current Growth Fund supported campaigns the organisation remains under-resourced and as a result vulnerable to risks associated with a resource-poor industry membership body.

Close working between VisitScotland main marketing campaign programmes and those of SailScotland could further enhance the impact and awareness of the 2020 Themed Year.

6.3 Customer feedback scheme

The MTDG engaged with STA regarding the approach to the potential development of a national customer feedback project. It was hoped that any marine project would align with national objectives and structures. It became apparent that the development of a national scheme was not seen as a priority at a national strategic level.

It was agreed to mothball the Marine Feedback Scheme until there was clarity around a national approach.

6.4 Marine Tourism Skills Pathway Plan

The matter of developing a skilled workforce to service future growth is vital and fully recognised by the MTDG. The skills agenda straddled many of the ATG ambitions, so it was agreed that a unifying approach to skills was required. The Marine Tourism Skills Pathway Plan (MTSPP) was devised as a mechanism that would bring skills across technical, service and management together.

BMS was recognised as the champion for this workstream due to their work in delivering the BM UK national training programme in Scotland. BMS also has industry experience around SVQ and developing of apprenticeship and was actively delivering training programmes to their members.

In June 2016 it was agreed with BMS the three core areas of the MTSPP would be: Leadership, Skills and Careers. Due to resourcing issues BMS were not able to take forward the

development of the wider development of a 'plan' and continued to deliver membership technical training services and service orientated Welcome Afloat courses.

In September 2017 the Project Manager met with Tourism Manager within Skills Development Scotland to accelerate work and to discuss the development of the MTSP and how SDS may be able to assist.

In December a draft MTSP was circulated to the MTDG seeking comment with no feedback received back to PM to date.

MTDG has been offered a seat at the national tourism skill development group table and has yet to decide on a subsequent action.

6.5 Marine Tourism Investment Framework

The ATG Strategy recognised the importance and need for the growth in built infrastructure to meet and support future growth of the sector. To that purpose the MTDG commissioned Ekos to undertake an economic evaluation, this to be based around and with comparisons to the previous 2010 report.

6.5.1 Ekos

A working group of BMS, SC, CE, HIE, RYAS and AR was convened to manage the working relationship with the appointed consultancy Ekos.

The brief was circulated causing protracted discussions brought about by BMS as to the objectives and outcomes expected of the report. After extensive discussions the brief was signed off by the MTDG and Ekos commenced work.

In November the report was in draft and after further protracted discussions around presentation, key findings and general concerns raised by BMS as to the veracity of the findings the report moved to final draft.

At this point BMS and Scottish Canals proposed to publish an alternative priority location listing. That in turn led to the MTDG appointing a subgroup to draw up a list of '**Key Location Review**' that were seen to be priority locations to support future growth and demand.

The discussion delayed publication of the Ekos report until January 2017.

The key findings of the report can be summarised as follows:

- The total current supply is approximately 15,700 berths up from 12,600 in 2009, an increase of 24%.
- Of these 13,500 are resident berths (up 23%) and 2,200 visitor berths (up 32%).
- Occupancy of resident berths is 95% which is the same level as in 2009, thus demand has kept pace with supply.

- The proportion of non-Scottish residents has increased from 13.5% in 2009 to 21.5% 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) and with development of the market this could increase under Scenario A by £30.5 million to £160.7 million (£52.6m from non-Scottish residents).

Under Scenario B the increase would be £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)

The full report is available at: <http://scottishtourismalliance.co.uk/page/marine/>

6.5.2 Key Location Review

Resulting from the discussions around a possible BMS/SC alternative list of locations it was agreed that a small working group (BMS, SC, HIE, CE and RYAS) would develop a detailed a list of key locations at three levels:

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

HIE and CE advised that neither organisation could be involved in ranking or listing preferences on locations as this would place them in a position that would be counter to their requirement of neutrality. Both parties withdrew from the process.

After extensive discussions an assessment criterion was agreed and detailed work was undertaken by the PM to score the locations. This list was passed to others in the group for comment and amendments.

During this phase it was necessary for the MTDG to seek notes of potential conflicts of interest from all parties on the working group. These were not forthcoming before further intervention was required by the PM.

A final list was created and agreed across the three levels and work undertaken to produce a briefing paper for key stakeholders. A draft report was developed by the working group, the PM and STA staff. The highlighted locations were taken to consultation by BMS at event workshops in the late autumn with that feedback due to the MTDG.

At this point BMS and SC advised that the group should not proceed with the process and that prior to publication a consultant should be appointed to undertake detailed engineering led reviews and surveys of each site. This action to provide a feasibility study for each key location.

It was also at this time BMS reported to the MTDG they had asked the chair of CPG to enquire as to the establishing of a £10m Marine Tourism Fund. Within this proposal there would be the appointment of a technical project manager to undertake technical assessment and feasibility recommendations of locations around the Scottish coast.

Work on the infrastructure workstream halted in December 2017 as the group could not agree a way forward. The document ***Infrastructure for Future Growth*** remains unpublished.

6.5.3 Tourism Development Framework

It was agreed that a cross check between the locations identified in the Location Review should be checked against that of the VisitScotland Tourism Development Framework. This work remains to be completed. There is however the recommendation that the Key Location Review findings are fed into VisitScotland to assist in advising on marine tourism investment priorities.

6.5.4 New Build Facilities

In December 2017 it was agreed that a monitor of new build marina/mooring facilities would be established. This high-level monitor would provide the MTDG with knowledge around what has been opened and development within the term of the Action Plan. Request for support in getting the report started have not been responded to and so remains an open action.

6.5.5 Stakeholder Engagement

In the period engaged with the following Growth Deal and Local Authorities promoting the MT potential and its importance in local economic and infrastructure development.

- SLAED – presentation alluding to strategy and potential of MT.
- Tay Cities Growth Deal – detailed discussion and contribution to submissions.
- Stirling Growth Deal – briefing to development team.
- Ayrshire Coast Growth Deal – MTDG Chair engaged through core development team.
- Perth and Kinross Council – detailed discussions around facility development on Tay.
- Dundee City Council – detailed discussions around Dundee Marina, Events and River Tay.
- Angus Council – Established link with Arbroath harbour expansion plans.
- Fife Council – Engagement around St Andrews developments associated with River Tay.
- Forth Bridges Tourism Development Plan – contribution to strategy consultation.
- Highland Council – Detailed discussions around MT potential and MTDG priority location list.
- Dumfries and Galloway Council- advised development of Area Tourism Strategy as to strategic aims of ATG Strategy.
- Nairn Harbour Group – supported group make strategic presentation to Highland Council.

6.6 Scottish Marine Tourism Convention

The principle of developing an event in 2020 that would put Scottish Marine Tourism on an international map has been discussed by the MTDG. To date there has not been detailed conversations or action plan around forming an organising group.

SailScotland has during the term of the Strategy delivered two successful national Marine Tourism conferences. The conferences are now an integral element of the national Scottish Tourism Week/Month programme.

6.7 Marketing Interest Group

No attempt was made to form a marketing advisory group whilst the board and staff of SailScotland oversaw and delivered national campaigns in partnership with VisitScotland.

6.8 Environmental Charter

It was agreed that the environment was a key message that the sector must recognise in terms of operator credentials. It was also recognised that the ATG Strategy was light on environmental messages. The core proposition of this workstream was to raise the profile of the environment with business operating in the sector and to utilise the services/schemes available and appropriate to their scale of operation and sector.

BMS were seen as champions due to their close connection with operators. Whilst there was considerable concern voiced by BMS regarding the concept of an overarching approach it was understood that the MTDG was not seeking to create a new vehicle but to promote available schemes.

The Project Manager reviewed a number of operator websites and reported that there was a lack of visibility of environmental messaging to the consumer. BMS agreed to communicate this to the industry.

It was agreed that Green Blue and WiSE were the two key schemes to signpost and promote to the industry.

In late 2017 it was reported that Green Blue, the adopted 'go to scheme' had lost elements of funding and had made staff cutbacks. The MTDG agreed that clarity was required as to the potential impact of this reduction in capacity. The Green Blue also published their priorities being monitoring of MPAs on boating activities and impacts of non-native invasive species.

The MTDG remain keen to better understand the position The Green Blue is in and potential for their ongoing supply of resources to operators here in Scotland.

6.9 Marine Business Monitor

The need to gather industry data was recognised within the Awakening the Giant Strategy. However, no mechanism had been identified as to how that data could be collected. Taking experience from destination-based business barometers the development of a Marine Business Barometer was discussed and agreed as a mechanism that, if developed correctly, could gather key trend data from the sector.

BMS took on the Project Champion role and opened discussions with Glasgow Caledonian University and developed a costed proposal. The scheme, when reviewed by the MTDG, was felt to be too single-sector focussed around marinas and did not reflect the wider nature of the sector nor collect appropriate trend intelligence beyond that of berthing rates and occupancy. It had also not proved possible to fund the proposed management costs nor agree the proposed branding and distribution of the survey through BMS.

BMS agreed that the Project Manager assumed control of the process. A range of possible questions was developed that could be scaled across the sectors. Assistance was sought from Scottish Enterprise who in turn agreed to fund and support the project. This, to supply a single annual survey, administrative support and analysis reporting.

In parallel the MTDG became aware of the pilot VisitScotland Area Business Barometer project. The MTDG had a presentation for the Insights Team at VisitScotland where it was agreed to liaise with them to explore the potential of a Marine Barometer running alongside the destination project. This was seen to be a preferable option due to:

- Survey distribution and analysis infrastructure
- Quarterly survey frequency
- Benchmarking opportunities by area and with other sectors
- Ability to connect Marine Tourism with other core tourism sectors through reporting and sharing of information

A proposed set of questions was circulated to the MTDG with Crown Estates and Scottish Canals contributing to the process. New set of questions are on file with the MTDG to be passed to VS.

7 Destinations

Through support by HIE a group of 18 destinations groups are now working on a scoping study to assess gaps and opportunities of MT along the west coast. The destinations range from Arran to Wester Ross and Hebrides. The project is expected to report in March/April. The working group is being administered by the Argyll and Isles Tourism Co-operative.

The end outputs will identify opportunity projects that will support destination growth but also maximise how MT can contribute to that economic growth. The project will also identify common customer management issues and so increase the understanding of the sector in each destination.

8 Cross Party Group

The Cross-Party Group (CPG) meets to further the promotion of recreational boating and marine tourism and the wider benefits thereof. The CPG provides a Parliamentary focus for wider recreational marine issues by discussing issues pertinent to the leisure marine

industry as a whole. The CPG seeks to raise the profile of recreational boating in Scotland through the means available to a Parliamentary Cross-Party Group. The Group meets 5 times a year.

In mid-2017, the MTDG secured a permanent place on the agenda and since then The PM has provide a verbal update to the CPG. The CPG acts as a positive link with the parliament and helps to maintain political interest in the MT sector and build awareness of progress around the Action Plan with a wide stakeholder group.

9 Organisational Abbreviations

- BMS – British Marine Scotland
- CE – Crown Estate
- ES – Event Scotland
- FCF – Firth of Clyde Forum
- HIE – Highlands & Islands Enterprise
- MTDG – Marine Tourism Development Group
- RYAS – Royal Yachting Association, Scotland
- SC – Scottish Canals
- SDI Scottish Development International
- SS – Sail Scotland
- SE – Scottish Enterprise
- STA – Scottish Tourism Alliance
- VS – Visit Scotland

Alan Rankin

Project Manager

February 2018

Marine Tourism Events

Working Group

Vision

Scotland, the premiere marine events destination in Europe

Marine Tourism Strategy Events Ambitions

The ambition to grow Marine Tourism from £360m to £450m by 2020 in the Awakening the Giant Strategy sets out in one of its three key themes, *Providing Authentic Experiences*, the ambition to *develop international, national, regional events and festivals*. The strategy identifies the following actions:

- Develop a comprehensive list of marine and related events and identify opportunities and gaps within the calendar.
- Align events to cross sell and capture wider economic and community impact and benefits.
- Develop sports specific events strategy for the sector.
- Secure international events.
- Review and support regional events to maximise the impact of marine tourism events.

Undertaking and Actions

The Events working group of: Stuart Turner ES, Jenny Stevenson ES, James Allan RYAS, Daniel Steele SS and Alan Rankin STA agreed to pursue the creation of a Marine Tourism Events Plan that can sit between Scotland the Perfect Stage and the Awakening the Giant National strategies.

To meet the above the water sports sector has been selected as the first sector with which to develop related work strands. The following strands have been identified:

- Scotland's Marine Assets – identify the assets that can support the development of marine based events.
- Scotland's Marine Events Calendar – identify and publicise a comprehensive events calendar and seek to maximise event opportunities.
- Future Marine Target Events – identify high profile 'bid for' events that will provide economic returns, high profile and add to the value of the Scotland brand.
- Working with Destinations and Communities – integrate marine tourism and events thinking and awareness with local groups and destination partnerships.
- 2020 Year of Coast and Water – identify and promote the potential of marine events to support the ambitions of the 2020 themed year.

Scotland's Marine Event Assets

Events Scotland will maintain a listing and understanding of Marine Tourism assets. The assets will be referred to when seeking to develop local events or large scale international events.

This list is not exhaustive:

Argyll & the Islands

Argyll and the Islands have a larger coastline than that of France and are regarded by many as one of the finest sailing areas in the world. The plethora of islands ensures that sheltered waters are always available for a pleasant day sail, whilst for those seeking greater adventure it is also possible to undertake longer coastal and offshore passages. The region has much to offer the visiting sailor, with a wide variety of sheltered anchorages together with many moorings, harbours and marinas. In recent years the facilities available have seen dramatic improvements with the installation of several pontoon systems with associated facilities in some of the areas more remote lochs and harbours creating an excellent chain of facilities stretching far to the North

East Coast

The East Coast of Scotland has much to offer yachtsmen, be they visitors en route to other cruising areas or sailors who keep their boat in one of the increasing number of marinas or harbour facilities. Until recently the East Coast perhaps tended to be seen as 'the missing link' in a potential circumnavigation of Britain, but recent developments mean that it is now as well served as any part of the Scottish (or indeed, British) coastline. The completion of this missing link has resulted in many new marina facilities between the border at Berwick and as far north as Wick. This includes the ongoing development of the waterfront at Dundee.

The Firth of Clyde

The Firth of Clyde is one of the largest areas of sheltered deep water in the British Isles, and as a result has been a major centre for recreational boating for well over a century. It is increasingly popular as a playground for local boat owners, as a destination for sailors cruising in their own yachts, and for those seeking a charter yacht holiday, or an intensive tuition course in the finer points of sailing.

Orkney & Shetland

Only a day's sail from the mainland, Orkney is an archipelago of 70 islands best explored by boat. The Islands are an exciting cruising destination with an abundance of wildlife, history and outstanding coastal scenery. There are secure marinas in Stromness, Kirkwall and Westray, all with good shelter and accessible in all tides. Each marina has dedicated visitor berths and good facilities and one rover ticket allows you to berth in all three. Each of the Islands has its own unique character and local piers and visitor moorings. Yachting has an important place in the calendars of Orkney and Shetland. In Shetland alone, 17 local regattas are held every year as well as the Round Foula Race, the Lerwick to Skerries Race and the Fjord Sailing Shetland Bergen Race which normally takes place in June.

Skye and the North West

The coastal waters around Skye, the Outer Hebrides and the North West of Scotland provide a range of cruising grounds with some of the most spectacular landscapes in the world. As with Argyll and the Islands there are plenty of options available, and an almost infinite combination of routes and destinations are possible. Whilst the nature of the sailing has itself not changed, the recent addition of pontoon facilities at a number of locations has made life more straightforward for some visitors.

Scottish Canals

Scotland's canals provide unrivalled access to sailing and boating, all set against fantastic landscapes and awesome scenery.

Scotland's Marine Events Listing

The working group has identified an initial listing of sailing events of consequence. Events are graded as per status of

1. **International:** Of international standing attracting overseas participants, high media exposure and broad awareness across UK and has overseas reach.
2. **National:** Of national importance and seen as leading main events of its type/category in Scotland
3. **Regional/Local:** Run by volunteer organisations and are seen as strong local events with loyal support.

Marine Events Listing

Initial work has identified the following events

| Status | Name |
|--------|--|
| 2 | West Highland Yachting Week |
| 2 | Powerboat P1 Grand Prix of the Sea |
| 2 | Scottish Series |
| 2 | Scottish Islands Three Peaks Race |
| 2 | Tiree Wave Classic |
| 2 | St Kilda Challenge |
| 3 | Largs Regatta Week |
| 3 | East Coast Week |
| 3 | Round Mull |
| 3 | Scottish Traditional Boat Festival |
| 3 | Inverness #CanalMagic Festival |
| 3 | Round Raasay Pursuit |
| 3 | Kyles' Cup |
| 3 | Plockton Small Boat Sailing Club Regatta |
| 3 | Gairloch Big Boat Race |
| 3 | Midsummer in the Minch |
| 3 | Kirkintilloch Canal Festival |
| 3 | Glencoe Regatta Feeder |

Future Marine Event Targets

The following outlines potential 'bid-for' events.

Clipper Round the World Race stage

- £1.5 million Team Sponsor and Host Port 2017/18
 - Payment spread over 2 financial years with a negotiable payment plan
 - This represents a £500,000 reduction on the list price

- £1 million per race Team Sponsor and Host Port 2017/18 and 2019/20 race
 - Payment spread over 4 financial years with a negotiable payment plan
 - This represents a £2 million discount on the list price
- Estimated additional investment of £300K-£500K required to host and manage additional events, plus city dressing around the start and finish, plus activation and promotion along the race route at other host ports.

Previous investigation of this event for Edinburgh in 2011 resulted in a decision not to bid, based on cost vs expected return of hosting a stopover.

Volvo Ocean Race stage (2018/20)

Based on Bid information provided for the 2017/18 race*:

- Indicative Fee payable to Volvo Ocean Race: €500,000
- Indicative operating budget to deliver local requirements: €1,000,000
- Potential Scottish Host City: Dundee

An expression of interest has been lodged by ES to the VOR.

Tall Ships Races

The Tall Ships Races are planned four years in advance with the route carefully selected to enable visits to different sea areas around Europe, from the Baltic to the Mediterranean. Once Sail Training International has selected the sea area, all the relevant ports in that region are invited to bid to become a host port, and a deadline for bids to be submitted will be set. Based on current information available for the 2019 event bid process, a November 2015 deadline was set with decisions communicated in December 2015. The host fee is expected to be in the region of £145K which should be negotiable.

Tall Ships Regatta

In August 2016, Liverpool was announced as a port for the 2018 Tall Ships Regatta event. This is a smaller format of the races with between 20-40 ships in the fleet and only 2-3 host ports, as opposed to 80-100 and 4-5 host ports for the Tall Ships Races. It therefore also attracts a lower host fee. It is understood there is not currently an open bid process around this format and discussions with Sail Training International would be needed if there was interest in hosting this level of event.

To Note: Tall Ships 2011 Ltd, based in Shetland, has recently expressed interest in hosting a future event and is looking into the potential of hosting the Tall Ships Races around 2023. Further info expected in due course.

Extreme Sailing Series

Now in its tenth season in 2016, the award-winning and adrenaline-fueled global Series has given the sport of sailing a healthy dusting-off. Bringing the action to the public with Stadium Racing, putting guests at the heart of the battle, and dramatically increasing the pace on the water, the creators of the Extreme Sailing Series™ have set new standards, both in terms of high level competition and sporting entertainment. With a new fleet of hydro-foiling GC32s replacing the Extreme 40 for the 2016 season the Series is proving to be another fast-paced and thrilling year.

The Extreme Sailing Series™ is one of the leading sailing events in the world - with Olympic gold medalists, America's Cup winners, World Champions and Round the World Record holders battling to win the overall series prize; strong media coverage across a broad range of media from sport, to lifestyle, to business; award-winning VIP corporate hospitality (where VIPs actually get to take part in the racing - truly unique, 'money can't buy' hospitality experiences); and fantastic entertainment for sailing fans and non-sailing fans alike with boats racing just metres away from the shore.

The Extreme Sailing Series circuit offers sponsors a global sporting entertainment product that is ripe for expansion in a relatively uncluttered market with strong sustainability credentials.

<http://www.extremesailingseries.com/>

Marine Tourism Strategy

Awakening the Giant

Marine Tourism Skills Pathway Plan

Discussion Paper

6th December 2017

Scottish Marine Tourism Skills Pathway Plan

1 Aims:

1. To generate a resource for businesses in the marine tourism sector that will prompt increased awareness of and higher levels of engagement with training support and resources so making for more profitable and resilient businesses.
2. To increase capacities and competencies in the sector across; Leadership, Skills and attracting and retaining talent.
3. To generate effective messaging and signposting mechanisms to resources for the sector.
4. Where possible lever new money to support yet to be defined projects and intervention delivery programmes so capitalising on 2020 Year of Coast and Water.

The Scottish Marine Tourism Skills Pathway Plan

The Scottish Marine Tourism Strategy 'Awakening the Giant' aims to maximise the growth potential of marine tourism in Scotland. The Strategy includes a commitment to develop and promote an industry facing Marine Tourism Skills Pathway Plan (MTSPP) that is based around the following three key areas;

- **Leadership** – developing the skills to grow the industry
- **Skills** – ensuring staff have service, technical, business skills
- **Careers** – an industry that attracts and retains great staff

The marine industry will work to develop a pathway into the industry, delivering a skilled and passionate workforce to sustain growth and expansion in concert with the overall strategic aims for the growth of Marine Tourism in Scotland.

The industry led plan will seek to develop a careers agenda aimed at placing the Marine Tourism industry as an aspirational choice of careers and lifestyle for new entrants and young people, creating sustainable long-term careers and supporting fragile and remote communities. Supporting this ambition will be programmes aimed to assist businesses develop the essential skills and competencies to maintain our competitiveness and ability to meet future market demands.

The aim of the MTSPP is to connect and reach into each of the fourteen sectors identified within the Marine Tourism strategy. Recognition is given to the fragmented nature of some sectors and there being more advanced business and membership groups in others e.g. sailing and boating.

The ultimate success and influence of the MTSPP will rely on reaching out to operators through a variety of channels such as; membership trade bodies, destinations, sector groups and local business networks.

It is also recognised that the most efficient method of developing an MT specific plan is not to reinvent the wheel but to work closely with the wider tourism skills agenda, thereby accessing established channels of support and also connecting businesses in the MT sector with wider tourism businesses, sector and destination groups.

Particular to the MTSPP is the real need for technical skills within the supply chain of boat building, repair, rigging and marine engineering. Such skill sets are not catered for within the Tourism Skills Investment Plan (SIP) and so are detailed in following sections under sperate actions.

2 The way Ahead

In addressing the three core aims of the MTSPP the following approach and actions are recommended:

2.1 Leadership

The Tourism Skills Investment Plan (SIP) identified that although some businesses have very good management and leadership; others do not. Poor leadership often reflects a lack of strategic approach by the business owner or management. If the business owners and managers lack strategic insight into the importance of skills to their business, this limits demand for training and development opportunities. The day-to-day needs of the business can prevent business owners and managers from focusing on leadership.

Key skills involved in management, leadership and enterprise are very broad and include:

- Business skills – particularly marketing and financial management skills
- Human resources – from recruitment to people management and development
- Project management
- Supply chain management and outsourcing
- Destination and industry leadership
- Stakeholder management – e.g. banks, training providers, local community engagement etc
- Developing more sustainable ways of doing business – reducing energy bills, ethical purchasing, fair work practices etc.

Further Education: Identification and promotion to marine tourism businesses of management/leadership training programmes delivered by colleges, universities and private training providers.

SDS Skills for Growth: Promote the Skills Development Scotland ‘Skills for Growth’ programme to businesses within the sector. Businesses get two days of free consultancy from SDS and Remarkable Scotland (formerly Investors in People) to help identify the business skills need, develop a detailed people plan and access appropriate training provision. <https://www.ourskillsforce.co.uk/growth/>

SE and HIE Management Development Programmes: Promote engagement amongst businesses with the Scottish Enterprise and HIE Management Development programmes

- <https://www.scottish-enterprise.com/services>
- <http://www.hie.co.uk/business-support/leadership/default.html>

Hospitality Industry Trust: Promotion of Hospitality Industry Trust (HIT) Scotland scholarship opportunities within the sector.

- <http://www.hitscotland.co.uk/>

HIE Webinars: A series of business webinars covering a wide range of business skills

- <http://www.hie.co.uk/growth-sectors/tourism/tourism-intelligence/webinar-series/upcoming-webinars.html>

BMS: Promotion of the BMS leadership support courses, aimed particularly at the boating market taking place throughout the year.

- <https://www.britishmarine.co.uk/Events-and-Courses/Training-Courses>

2.2 Skills - Technical, service, digital, environmental, events

The Tourism SIP prioritises the need to ensure staff across the sector have the skills to deliver a high-quality experience and the digital skills needed to operate in the modern world of social media and on-line marketing and booking. The quality of customer service across businesses is variable and can be compromised by seasonality and/or the high turnover of the workforce. Staff customer

service skills need to include having strong product knowledge about the business in which they work and the wider destination in which the business is located.

2.2.1 Technical

Modern Apprenticeships: Promotion to businesses of hospitality Modern Apprenticeships for new or existing employees as a way to increase service and food preparation skills within the business.

- <https://www.apprenticeships.scot/take-on-an-apprentice/modern-apprenticeships/>
- <https://www.britishmarine.co.uk/Events-and-Courses/Training-Courses>

2.2.2 Service

Welcome Ashore: Continued delivery and promotion of the Welcome Ashore training programme.

Welcome Host: Also, consideration given to promoting engagement by businesses with local tourism destination customer service training programmes which will involve joint training and the sharing of good practice with other local tourism businesses. Examples would be World Host or the on-line derivatives of Glasgow Welcomes available in many destinations around Scotland.

- <http://scotland.worldhost.co.uk/>
- <http://glasgowcitymarketing.com/support/glasgow-welcomes/service-excellence/online-module/>

2.2.3 Digital

Digital Tourism Scotland: Promotion to Marine Tourism businesses of the Digital Tourism Scotland programme

- <https://www.digitaltourismscotland.com/through-the-topic-library>
- [https://www.digitaltourismscotland.com/topic-library/ or future events](https://www.digitaltourismscotland.com/topic-library/or-future-events)
- <https://www.digitaltourismscotland.com/events/>

Digital Boost: Promotion and signposting to Gateway Digital Boost workshops

- <https://www.bgateway.com/events>
- Online tutorials <https://www.bgateway.com/online-tutorials> and free 1:1
- business support <https://www.bgateway.com/driving-growth/digital>

2.2.4 Environmental

Key to the future sustainability and success of the sector is the maintenance of the environment and the highest possible level of environmental credentials being applied to working practices across the industry. The MTSP will seek to promote environmental best practice within the core skills agenda and support businesses embrace environmental matters as an opportunity for the sector rather than a threat or obstacle to growth.

Green Blue: Signposting will be given a higher profile to the Boating Business support information at:

- <https://www.thegreenblue.org.uk/Boating-Businesses>

WISE: Signposting to accreditation-based support, guidance and course for boating operators when engaged in wildlife watching:

- <http://www.wisescheme.org/>

SNH: Signposting businesses towards SNH resources around wildlife watching and managing coast and seas.

- <https://www.snh.scot/professional-advice/land-and-sea-management/managing-coasts-and-seas/scottish-marine-wildlife-watching-code>

2.2.5 Events

The ability for Scotland to host regional, national and international competitive events depended upon the facilities being at world class levels but also having the paid and voluntary staff in place and trained to deliver memorable events. RYS Scotland operate a range of skills and training programmes delivered through accredited delivery partners across competitive performance, race official and race coaches.

- Instructors: <http://www.rya.org.uk/scotland/training/instructor-training/Pages/hub.aspx>
- Race Officials: <http://www.rya.org.uk/scotland/training/Pages/race-officials.aspx>
- Race Coaches: <http://www.rya.org.uk/scotland/training/Pages/race-coaches.aspx>

2.3 Careers - Attracting Talent

This is a significant challenge for the tourism sector in general across the UK and is related to real and/or perceived low pay, high turnover of staff, long shifts and the seasonality of work. A concerted effort is required working with schools to change the attitude to jobs and careers in all aspects of tourism amongst pupils and parents. The most effective means of doing this is seen as in-person visits and talks by employers and young employees along with positive work experience opportunities within the sector.

Actions to consider

Developing the Young Workforce’: Promote opportunities for marine tourism businesses to engage with local ‘Developing the Young Workforce’ (DYW) initiatives. There is now an industry led DYW partnership in every region of Scotland and they are are tasked with bringing education and businesses closer together. A website called ‘Marketplace’ provides the mechanism for businesses to get involved with local schools.

<https://www.ourskillsforce.co.uk/invest-in-young-people/marketplace/>

Springboard: Discuss joint working between marine tourism businesses and the Springboard Charity. Springboard has a range of initiatives for schools and career changers designed to promote the tourism sector as a career of first choice. They are keen to encourage businesses from all parts of the tourism sector to get involved and promote the wide range of career opportunities on offer.

- <https://springboard.uk.net/>

BMS:

- <https://www.britishmarine.co.uk/Events-and-Courses/Training-Courses>

3 Delivery

The delivery of the MTSP will be dependent upon the commitment of stakeholders to resource the initial development stage, communications phase and when appropriate a refresh phase.

The MTSP would take the form of;

- Communication campaign to be developed through partner (e.g. STA) leading to:
 - Signposting cards that are widely distributed at events, through trade bodies and

- Digital space on stakeholder websites
- Social media
- Engagement through destination groups, sector groups and membership organisations

The forthcoming 2020 Year of Coast and Water provides a platform to engage with possible funding partners to generate delivery programmes.

4 Next steps

- MTDG Skills Group agree direction and content of paper
- The MTDG approves the direction and approach outlined above.
- Secure resource commitment with partners to enable launch and provide substance through to 2020 (Partners: BMS, SE, HIE, SNH, WISE, Business Gateway, DTS, UHI, Glasgow College, HITS, Springboard, Scottish Canals)
- SDS and MTDG Skills Group to explore style and formation of the action plan, signposting and distribution methods out to business and recording of uptake
- Aim: to provide an outline (launch if possible) of Scottish Marine Tourism Skills Pathway Plan at Marine Tourism Conference March 2018


Alan Rankin
December 2017

12 Appendix 3 - Marine Tourism Business Barometer Survey Questions

Marine Tourism Business Barometer Survey Questions

Utilizing the VS Barometer structures and data analysis the following is suggested as the possible string of questions for the Marine sector.

Potential Data Collection (VisitScotland standard questions in purple)

1. **How do you describe your main activity of business?**
 - a. **Caravan/Camping, Hostel, Hotel/B&B/Guest House/Other/Outdoor Activity operator/Restaurant/Pub/Café, Retail, Self-catering, Tour Operator, Visitor Attraction, Marine** 
 - i. Marinas & Boatyards, Yacht charters, sailing holidays, sailing schools, dinghy & powerboating. Plus, Daytrip boat operators and Wildlife Watching
2. **How did your turnover compare in this quarter to the same period last year?**
 - a. Up, Similar Down, Business closed
2. **How were your customer numbers in this quarter compared to last year?**
 - a. Up, Similar, Down, Business Closed
3. **Do you have any plans to significantly invest in your business in the near future?**
 - a. Yes, No
4. **If Yes, over what period is your investment planned for?**
 - a. Next 12 months, 12-18 months, 18-24 months, 24 months +, Don't know
5. **If yes please indicate how much of a percentage change this has been, against the same period last year?**
6. **Has there been any difference in who your customers have been this (Spring) season compared to (Spring) last year?** {Set against: Local, Rest of Scotland, Rest of UK, Overseas}
 - a. More, same/similar, less, don't know
7. **Please indicate how confident you feel about the performance of your business over the following periods?** {3 months, 12 months, 24 months}
 - a. Very optimistic, Quite optimistic Neutral level of confidence, Not very optimistic, Not at all optimistic
8. **What do you see as the main barriers to the growth of your business?**
 - a. Weather, exchange rates, staff/skills shortage, lack of finance facilities, lack of local infrastructure, lack of marketing, rising costs
9. **Where is your main business located?**
 - a. Location {use the Sail Scotland regions of: Firth of Clyde, Argyll and Isles, Skye and North West, Orkney and Shetland, East Coast, Inland Canals} (note option to tick multiple locations)
10. **Please confirm the number of years your present business has been in operation?**
 - a. 1-3, 4-7, 7-10, 10+
11. **Please confirm the number of staff you have this last quarter?**
 - a. Full time, part-time, Overall Full Time Equivalent
 - b. Is this more or less than the same quarter last year? More Less
12. **If clicked on Marinas & Boatyards**
 - a. Available berths (resident and for visitor) over the last quarter?
 - i. Up, Similar, Down, Business Closed

- b. Occupancy (resident and for visitor) over the last quarter?
 - i. Up, Similar, Down, Business Closed
- c. Total visits (visitors) over the last quarter?
 - i. Up, Similar, Down, Business Closed
- d. Visitor nights (visitors) over the last quarter?
 - i. Up, Similar, Down, Business Closed

13. If clicked on Day Trip/Wildlife

- a. Headcount on board over the last quarter?
 - i. Up, Similar, Down, Business Closed
- b. Trips undertaken over the last quarter?
 - i. Up, Similar, Down, Business Closed

Open Text

- Ability to offer an open text opportunity to allow for further feedback comment and views.

Alan Rankin

December 2017