

# PRODUCTIVE : RECREATION AND CULTURAL HERITAGE

## Marine tourism

### Key message

Marine tourism is a key sector for Scotland, generating £594 million Gross Value Added (GVA) and employment for 28,300 people in 2017. The long term trend from 2008 to 2017 showed marine tourism GVA increased by 28% and employment by 16%.

### What, why and where?

Marine tourism covers a wide range of activities including: walking/ hiking/ running, beach activities, photography, yachting/ sailing, swimming, wildlife tourism, diving, kayaking, angling, surfing, visitor attractions and increasingly, cruise ship visits. Much of the sector relies on people taking part in activities in places where they are freely permitted: for example sailing where there is freedom of navigation and walking where there is suitable access (paths, beaches etc.). As a result gathering spatial data to locate activity is not straightforward.

Economic figures show that marine tourism accounted for around 14% of all tourism in 2017. While figures from the study of Scottish residents found that the vast majority (89%) of the Scottish public surveyed have visited the Scottish sea or coast in the past year. (Scottish Government, 2020).

The [Scottish Marine Recreation Tourism Survey](#) (SMRTS) (Scottish Government, 2016) was commissioned to inform the National Marine Plan (Scottish Government, 2015). It provided marine planners, the tourism industry and



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potential investors with information about 23 different recreation and tourism activities undertaken at sea and around the coastline.

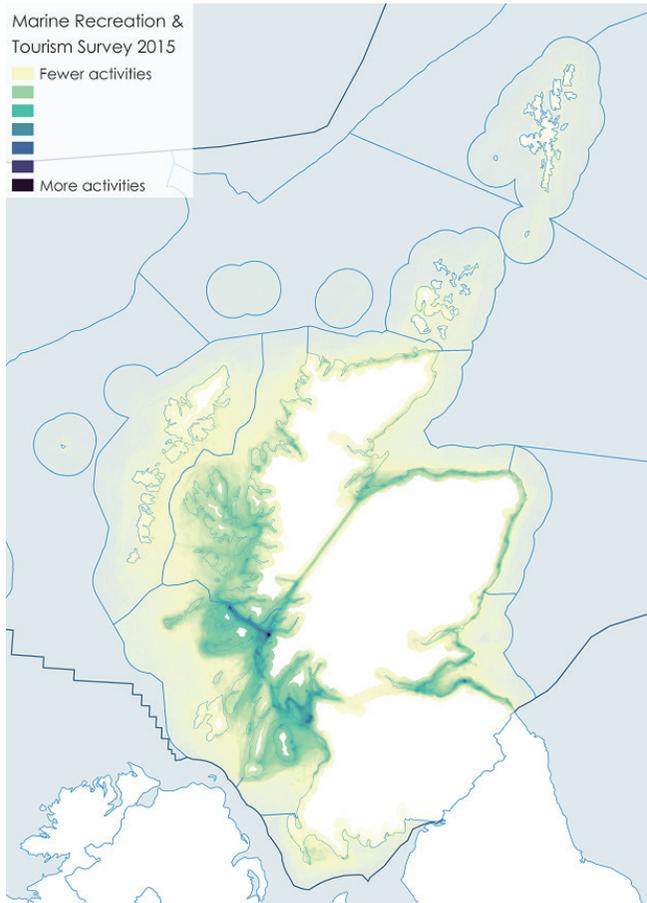


Figure 1: Marine recreation and Tourism Survey 2015 - All activities combined (showing Scottish Marine Regions and Offshore Marine Regions). Darker colouring shows areas of higher activity.

Source: Scottish Marine and Recreation Tourism Survey (Scottish Government, 2016).

The survey encompassed many types of tourism, with differing levels of response and activity. So the results are helpful to identify busy areas and activities with confidence, although less busy areas or activities are reported with less confidence. A nil response to the survey does not mean nil activity.



Figure 2: Anstruther Harbour © Visit Scotland

Scottish Government has designated 2020 the Year of Coasts and Waters. The importance of marine and coastal tourism was a key driver in this designation.

### Contribution to the economy

Marine tourism generated £594 million Gross Value Added (GVA) and employment for 28,300 people in 2017 (Scottish Government, 2019). This represents 14% of the £4.1 billion GVA from

all Scottish tourism. GVA is the value of goods and services produced minus the cost of raw materials and other inputs used to produce them. Marine tourism employment figures account for 38% of employment in the Scottish marine economy (excluding oil and gas extraction). However these figures are headcounts and do not take account of the seasonal and part-time nature of employment in marine tourism.

From 2014 to 2017, the GVA from marine tourism (adjusted to 2017 prices) increased by 2%, while the longer term trend from 2008 to 2017 (Figure 3) showed that marine tourism GVA increased by 28%. From 2014 to 2017 employment increased by 6%, while the longer term trend, from 2008 to 2017, showed a 16% increase.

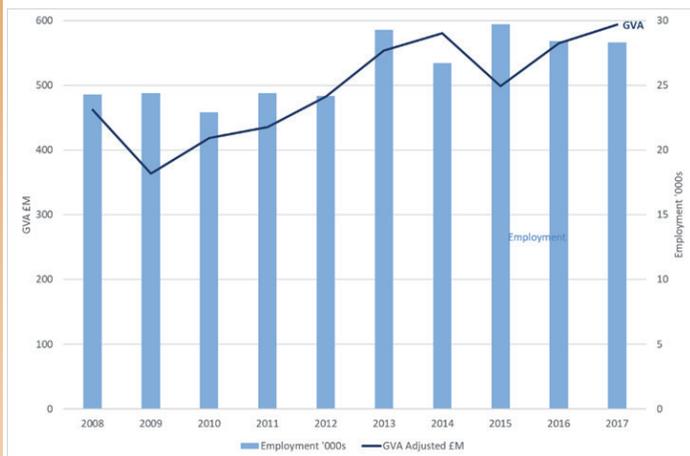


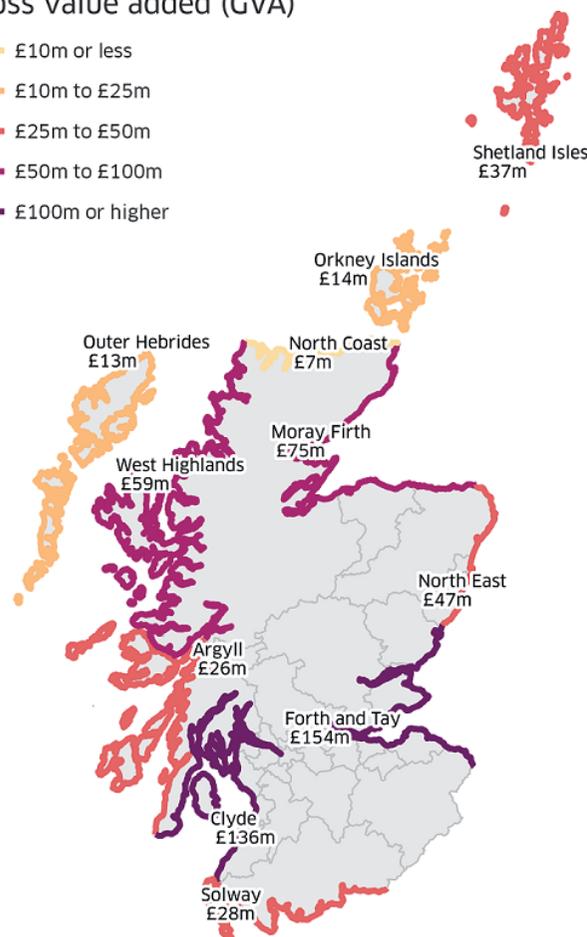
Figure 3: Marine tourism - GVA and employment (headcount), 2008 to 2017 (adjusted to 2017 prices).

Source: Scotland's Marine Economic Statistics. (Scottish Government, 2019).

Economic values for leisure and tourism can be provided by Scottish Marine Region (SMR) (see Table g, in 'Read More' section). Information by local authority is unavailable due to the small number of responses for some areas and the need to protect the confidentiality of individual businesses. While SMRs are geographies that relate to the sea, marine tourism is earned on land and so the figure shows outputs around the coast.

### Gross value added (GVA)

- £10m or less
- £10m to £25m
- £25m to £50m
- £50m to £100m
- £100m or higher



### Total Employment

- 500 or less
- 500 to 1,000
- 1,000 to 2,500
- 2,500 to 5,000
- 5,000 or greater

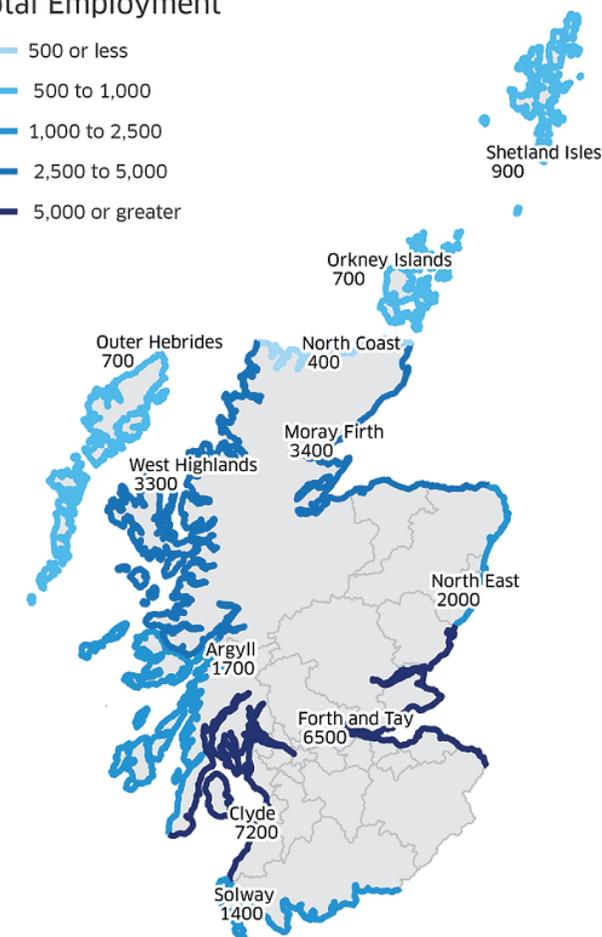


Figure 4: Marine tourism GVA (left) and employment (headcount) (right) by Scottish Marine Region, 2017.

Source: Marine Scotland. Scottish Government (2019).

The Sailing Tourism in Scotland report (EKOS, 2016), concluded that Scotland's sailing tourism economy is worth £130 million and supports 2,700 jobs.

## Examples of socio-economic effects

- Contributes to a healthier, happier nation.
- Contributes to the economy, drives inclusive growth and underpins supply chains.
- Provides employment in rural and coastal locations.
- Major events (e.g. West Highland Yachting Week and Tiree Wave Classic) give coastal communities a distinct and global profile.
- Seasonal nature not as robust as non-seasonal industries.
- Vulnerable to economic downturns.
- Activities can compete for space.

## Pressures on the environment

An OSPAR agreed list of marine pressures is used to help assessments of human activities in the marine environment. The [marine pressure list](#) has been adapted for use in Scotland via work on the [Feature Activity Sensitivity Tool \(FeAST\)](#). Leisure and recreation activities can be associated with 13 marine pressures – please read the pressure descriptions and benchmarks for further detail.

## Forward look

The Year of Coasts and Waters 2020 will focus attention on Scotland's seas and coasts.

Marine and coastal tourism also features as a key sector in other Scottish Government work, such as City Deals, regeneration projects such as that currently being undertaken in North Ayrshire and the wider Programme for Government Commitment to develop the South of Scotland as a tourism destination. The effect of the Themed Year and other initiatives will be evaluated in appropriate data in future years.

The SMRTS 2015 survey highlighted the importance of good environmental conditions and abundant marine wildlife to marine tourists and particularly to many recreational boaters. The joint British Marine and RYA initiative [The Green Blue](#), a website that promotes sustainable boating for cleaner and healthier waters, has been reinvigorated (2019) and RYA has been working with NatureScot to minimise any adverse effects of recreational boating on Priority Marine Features.

The cruise ship industry is expected to continue to expand. The industry is confident that 1 million passengers a year will occur either in 2019 or 2020. A study (Cruise Scotland, 2010), when 248,923 visitors arrived, forecast 830,000 passengers by 2025, so growth continues ahead of expectations.

## Economic trend assessment

GVA from marine tourism in Scotland has increased from £580 M in 2014 to £594 in 2017 (2017 prices) an increase of 2% (2014 is used as the base line to remain consistent with the earliest that the disaggregated SMR data for marine tourism is available).

National trend



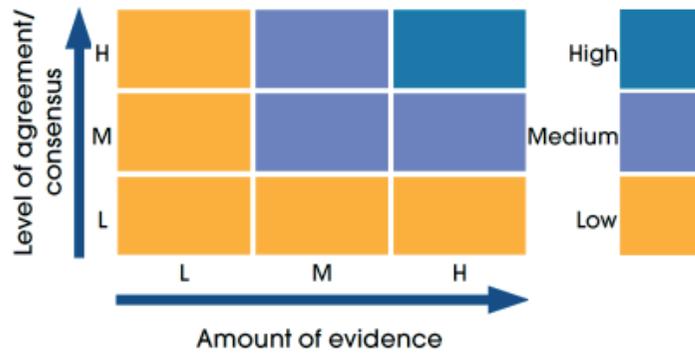
Scottish Marine Region trends are based on GVA at 2017 prices. The % change in GVA is reported. Changes of less than 5% are considered as not substantial changes. In addition, trend arrows are not calculated on small values (GVA of less than 20 million in 2017) due to the volatility of the source Scottish Annual Business Statistics sample data. Confidence is three stars as based on published national statistics. The detailed table of results is shown as Table g in the *Extended economic section* above.

Scottish Marine Region	Trend assessment	
Argyll		-25.9%
Clyde		-8.7%
Forth & Tay		32.0%
Moray Firth		14.2%
North East		-2.7%
Shetland Isles		114.5%
Solway		-20.2%
West Highlands		-7.9%

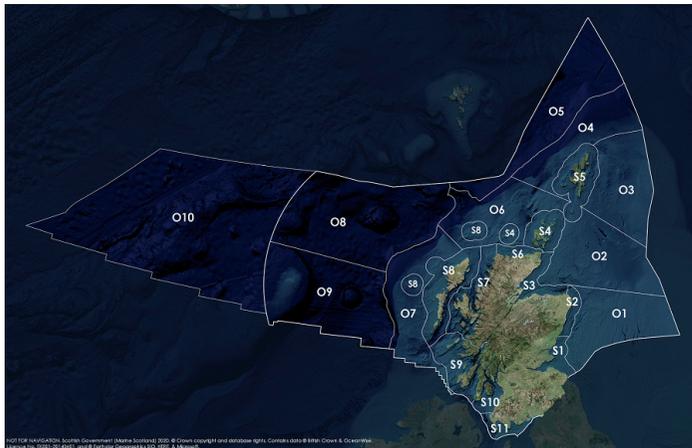
## Status and trend assessment legend

Status assessment (for Clean and safe, Healthy and biologically diverse assessments)		Trend assessment (for Clean and safe, Healthy and biologically diverse and Productive assessments)	
	Many concerns		No / little change
	Some concerns		Increasing
	Few or no concerns		Decreasing
	Few or no concerns, but some local concerns		No trend discernible
	Few or no concerns, but many local concerns		All trends
	Some concerns, but many local concerns	<b>Confidence assessment</b>	
	Lack of evidence / robust assessment criteria		
	Lack of regional evidence / robust assessment criteria, but no or few concerns for some local areas		Low
	Lack of regional evidence / robust assessment criteria, but some concerns for some local areas		Medium
	Lack of regional evidence / robust assessment criteria, but many concerns for some local areas		High

## Overall confidence



## Assessment regions

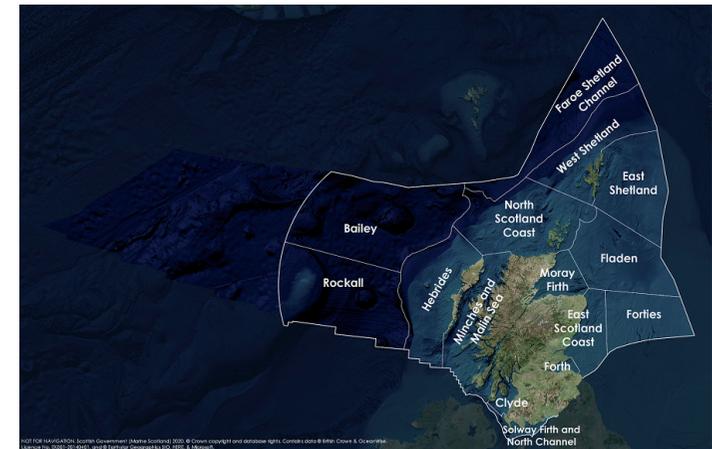


The Scottish Marine Regions (SMRs; S1 - S11) and the Scottish Offshore Marine Regions (OMRs, O1 - O10)

Key: S1, Forth and Tay; S2, North East; S3, Moray Firth; S4 Orkney Islands; S5, Shetland Isles; S6, North Coast; S7, West Highlands; S8, Outer Hebrides; S9, Argyll; S10, Clyde; S11, Solway; O1, Long Forties, O2, Fladen and Moray Firth Offshore; O3, East Shetland Shelf; O4, North and West Shetland Shelf; O5, Faroe-Shetland Channel; O6, North Scotland Shelf; O7, Hebrides Shelf; O8, Bailey; O9, Rockall; O10, Hatton.



Biogeographic, Charting Progress 2 (CP2) Regions. These have been used as the assessment areas for hazardous substances.



Scottish Sea Areas as used in Scotland's Marine Atlas 2011. These are sub divisions of the biogeographic, or Charting Progress 2 (CP2), Regions.