

Giant Opportunities

2026 – 2030

A Strategic Framework
for Scotland's
Marine Tourism Sector

Supporting communities, the environment and
economic growth around Scotland's coasts, lochs and waterways.

Contents

Foreword by Stuart McMillan MSP	3
Introduction	4
Market changes	8
3.1 Scottish tourism	10
3.2 Scottish marine tourism overall	11
3.3 Boating and cruise tourism	11
3.4 Changes in participation	12
New and emerging opportunities	14
Challenges	18
5.1 Economic and geopolitical pressures	20
5.2 Skills shortages and workforce challenges	20
Developing the way forward	22
6.1 Net zero and clean seas	25
6.2 Nature-based activities and blue health	26
6.3 Community and place-based approach	26
6.4 Skills development	27
6.5 Pathways into the sector	27
6.6 Reinforcing the sector's professionalism	27
Objectives and Actions	28
7.1 Theme 1: Sector Growth by Value and Visibility	30
7.2 Theme 2: Skills Development	31
7.3 Theme 3: Community and Placemaking	32
7.4 Theme 4: Net Zero and Sustainability	33

Navigating a sustainable future



By Stuart McMillan MSP,

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

Scotland - a small country with a long coastline and an enviable abundance of freshwater lochs and rivers. Situated between the North Atlantic Ocean and the North Sea, the nation's territorial waters extend to 462,315 square kilometres. This is a precious resource that has supported a wealth of offshore industries and inspired ever-increasing participation in water-based leisure pursuits.

Scotland's first marine tourism strategy - **Awakening the Giant** - was published in 2015 and built a stable framework for growing industry sectors that contribute so much to the national economy, regional development ambition and local community sustainability.

On publication of the revised strategy - **Giant Strides** - in 2020, travel, tourism and leisure markets were disrupted by the global pandemic; and in addition to the outstanding lifesaving efforts of health care workers, intense industry support was necessary to save many businesses from collapse.

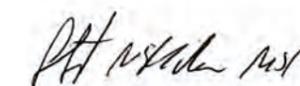
The trading environment is still challenging for many, and this latest strategic framework acknowledges the importance of embracing opportunities. Close alignment with Scotland's Tourism Strategy **Scotland Outlook 2030** and the **National Strategy for Economic Transformation (NSET)** will help the marine tourism sector deliver sustainable growth priorities across the country, in collaboration with local authorities, destination organisations and a range of partners who recognise the role of marine and coastal tourism in destination development.

In 2023, marine tourism in Scotland generated £699 million in GVA. Getting this far has relied on a dedicated industry, and on embracing partnerships. Contributions from business operators, economic development and tourism experts, environmental specialists and education and training professionals have blended experience with a shared image of the future. A future where community regeneration is allied to jobs and prosperity, environmental sensitivity and social wellbeing; and a future that acknowledges the interdependence of sustainability and ocean health.

The strategic focus on place is now more important than ever. It is vital that developments support the needs and ambitions of communities, and that Scotland's priceless natural assets are protected against damage, decline and neglect. Our spectacular maritime environment is world-renowned and the most compelling reason for visiting the coast. Maintaining the sector's global reputation for responsible and sustainable tourism is critical, and this strategy makes our collective obligations very clear.

Looking after inland waters and waterways is just as important, and the safety of people enjoying themselves on, in or near the water is the primary consideration. Every one of us can take simple measures to minimise risk to ourselves and others, and take a moment to consider the consequences of our actions. Together, let's make sure we are safe.

It continues to be a pleasure and a privilege to support marine tourism in Scotland, and I have every confidence the industry can thrive, contribute to sustainable destination development; support jobs and supply chains; and maintain a worldwide reputation for quality.



Introduction



Since 2020, when British Marine Scotland (BMS) published the last strategic framework for Scotland's marine tourism sector, there have been significant changes in both the policy space and within the wider marine tourism sector. It is those changes, together with new and emerging opportunities, which has led BMS to work with its members and partners to produce this updated strategic framework, Giant Opportunities 2026-2030.

This framework sets out updated themes, strategic priorities and objectives. Its purpose is to **provide an overarching guide for industry and government**, enabling them to harness the support and collaboration required to deliver actions aligned with the core themes now considered fundamental to the future growth of marine tourism in Scotland.



Our Vision

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

Our Mission

To work with others to grow marine tourism in Scotland from £699 million in 2023 to £800 million by 2030.



The realisation of our vision will depend on securing strong collaboration across our industry and beyond, as well as positive engagement from government.

Sustaining the growth in Scotland's marine tourism industry over the next five years will also require maintaining a sharp focus on the following core themes:

Theme 1: Sector Growth by Value and Visibility

Theme 2: Skills Development

Theme 3: Community and Placemaking

Theme 4: Net Zero and Sustainability

In developing this framework consideration has been given to recent and future anticipated shifts in the economic, social and environmental landscape. BMS has also taken care to ensure that, like its predecessor Giant Strides (2020 - 2025), this new framework aligns strongly with other national strategies including:

- Scotland's National Strategy for Economic Transformation (NSET)
- The national tourism strategy, Scotland Outlook 2030
- A Blue Economy Vision for Scotland
- The National Marine Plan 2 (NMP2).

Such alignment is considered essential as this framework is not only designed to support the Scottish marine industry but also Scotland's wider tourism sector. Whilst it is focussed on marine tourism, it aims to encourage wider collaboration, not least with both local and national government to inform investment decisions. This will not only help deliver more innovation and inclusivity within marine tourism but also advance sustainable economic growth more widely.

Marine tourism has an important role to play in realising the Government's Blue Economy Vision for Scotland. Examples include developing its transferable skills which can support Scotland's offshore renewable energy industries; investing in shared infrastructure for the benefit of multiple marine user groups; and positioning marine health not only as a driver of sustainability but also as a key marketing asset for Scotland's tourism offer.

Our focus

The focus of this strategic framework is Scotland's coastal, inland water and wider marine tourism.



It includes a wide variety of recreational and sporting activities, taking place on both coastal and inland waters, with examples illustrated below.

- **Coastal marine activities** - such as swimming, surfing, and other water based recreational and sporting activities that take place off beaches and banks of lochs and rivers.
- **Inland water marine activities** – including, for example, paddle sports, boating and other nautical sports that take place in aquatic environments located within land boundaries e.g., lochs, rivers, canals etc.
- **Offshore marine activities** - such as boating, offshore yachting and other nautical sports which rely on Scotland's associated marine land-based services and infrastructure.

Of particular importance today are **board and paddle sports**. Having grown significantly over the last five years they now form a key element of the marine sector mix. They also provide a vital gateway for new entrants into the world of boating and other marine activities.

What distinguishes this framework from its earlier iterations is its **strong emphasis on both intra-sector and cross-sector collaboration to grow marine tourism** and fully exploit opportunities from the industry's extensive supply and value chains. This may range from securing greater co-operation with local authorities over planning and regeneration projects to exploring the use of shared infrastructure with aquaculture and the renewable energy industries.

Market changes

Although it is just over five years since the publication of the last marine tourism strategic framework, Giant Strides, it has been a period of dramatic global events which have impacted the market. From the UK exiting the European Union and the Covid-19 pandemic, to the outbreak of war between Russia and Ukraine and turbulence in international trade triggered by US tariff policies – all of which has impacted the cost of living in the UK, squeezing disposable incomes and stalling business investment decisions.



3.1 Scottish tourism

Whilst tourism, including marine tourism, saw a significant decline in 2020/21 due to the Covid-19 pandemic, the sector in Scotland rebounded strongly in 2024, surpassing pre-pandemic levels and demonstrating its resilience and the ongoing demand for Scotland’s distinctive visitor experiences.

International tourism has seen notable gains, with visits rising from 3.5 million in 2019 to an estimated 4.5 million in 2024, and international spend increasing from £2.5 billion to an estimated £4 billion. North America continues to provide the largest share of international visitors to Scotland, with visits in the first half of 2024 up 54% from 2023 and up 69% from numbers recorded in 2019¹.

Domestic tourism in Scotland also remained strong in 2024, with British visitors making 10.6 million overnight trips and spending a total of 29.5 million nights in the country. While this represents a slight decrease from 2023 levels, overall visitor spend continued to grow,

reaching £3.3 billion – up from £3.2 billion the previous year. Total overnight spend is estimated to have reached £7.3 billion in 2024 - up from £5.5 billion in 2019 - reflecting strong demand and increased visitor value.

The Scottish Tourism Alliance found that modest changes in tourist numbers in recent years have been influenced by factors such as the cost-of-living crisis, rising energy bills, and the return of international travel post Covid. However, the sustained growth in spending highlights the enduring appeal and value of Scotland as a visitor destination.

In summary, Scotland’s tourism industry has shown a strong recovery since the pandemic and from the Economic Value of Boating Tourism in Scotland report (2022) we are confident that marine tourism is likely to mirror trends across the wider tourism sector.

Table 1 outlines the performance of Scotland’s tourism sector across key metrics from 2019 to 2024.

Table 1: Tourism Performance Scotland 2019-2024

Year	Domestic Overnight Trips (GB Residents)	Domestic Spend (£m)	International Visits	International Spend (£m)	Total Overnight Visits	Total Overnight Spend (£m)
2019	12.0m	£3,000	3.5m	£2,547	15.5m	£5,547
2020	3.0m	£750 (est.)	0.5m (est.)	£462	3.5m (est.)	£1,212
2021	9.0m	£2,250 (est.)	0.5m	£462	9.5m (est.)	£2,712
2022	13.0m	£3,500 (est.)	3.2m	£3,192	16.2m (est.)	£6,692
2023	12.4m	£3,189	4.0m	£3,593	16.4m	£6,782
2024	10.6m	£3,300	4.5m (est.)	£4,000 (est.)	15.1m (est.)	£7,300 (est.)

Source: VisitScotland

The overall trends indicate a resilient and growing sector which bodes well for all parts of the visitor economy, including marine tourism.

¹ See here: International Tourism Performance | VisitScotland.org

3.2 Scottish marine tourism overall

At the time of publication the latest official dataset was Scotland’s Marine Economic Statistics for the year 2023. This reported that marine and coastal tourism generated £699 million in GVA – recovering to pre-pandemic levels, having fallen to £404million in 2020. Marine and coastal tourism accounted for 12% of total marine GVA, supporting 34,600 jobs, with full-time equivalent (FTE) employment at 25,000, making it the largest employer within the marine sector at 46% of total marine employment².

3.3 Boating and cruise tourism

The Economic Value of Boating Tourism in Scotland report³ produced by EKOS in 2022 on behalf of BMS highlighted the contribution that boating tourism makes to the Scottish economy. Specifically, it found that sailing and boating contributed **£84 million in Gross Value Added (GVA) and supported 3,100 Full-Time Equivalent (FTE) jobs** to the Scottish economy.

Cruise tourism in Scotland has also grown significantly in recent years, with almost 1.1 million cruise passengers visiting Scotland in 2024. This involved approximately 1,000 cruise ship visits – often to some of the most remote communities. This is a significant increase from the 817,000 cruise passengers, and 893 cruise ship visits, in 2019. According to Cruise Scotland, in 2024, **cruise-tourism contributed around £130 million** to Scotland’s local businesses and communities. Growth in cruise tourism should be welcomed given the positive spin-offs it can deliver for Scotland’s wider marine tourism sector. Cruise visitors can act as an important gateway to longer-stay marine experiences, supporting local boating businesses, marine services, wildlife tourism and coastal attractions, particularly in rural and island communities. When planned and managed collaboratively, cruise tourism can complement boating and other marine activities, helping to generate economic benefits while supporting sustainable destination development.

These figures continue to grow thanks to the likes of Stornoway deep water port which opened in April 2024 and can accommodate some of the largest cruise ships in the world, which can exceed 360 meters in length. This is having a significant positive impact. For example, in its first year of opening Stornoway deep water port saw 76 cruise calls, with the number projected to increase to 94 per annum by 2030.

Orkney has also noted a significant increase in cruise visitors, with a report to its council confirming that 2024 saw 213,785 cruise passenger arrivals - an increase of 237% on 2014⁴.

Looking ahead there is an **opportunity to strengthen Scotland’s marine tourism through more collaborative planning and investment between the cruise and boating sectors**. Both of these activities should complement the wider marine sector while avoiding undue pressure on local communities. Concerns about the impact of cruise tourism on ports and residents are well documented, but with more coordinated approaches it should be possible to manage visitor flows and deliver sustainable infrastructure to maximise the economic benefits while minimising any adverse environmental and social impacts.

² See here: Supporting documents - Scotland’s Marine Economic Statistics 2023 - gov.scot

³ See here: Industry Update: Marine tourism plays a key role in boosting Scotland’s economy | Scottish Tourism Alliance

⁴ See here: Item 06 Cruise Ship Levy Consultation

3.4 Changes in participation

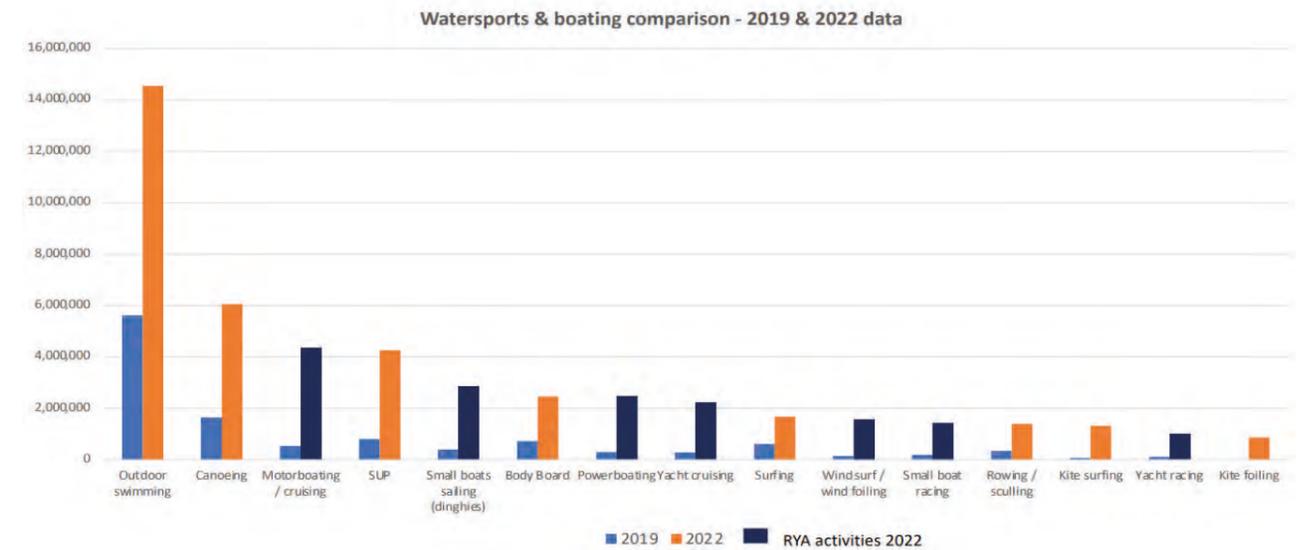
In 2023 the RYA published an analysis of UK Watersports Participation data, with a particular focus on the changes that occurred between 2019 (pre COVID-19) and 2022 (post COVID-19) and also from 2002 to 2019. One of the headline graphics illustrates **strong growth in participation across all types of watersports activities** (see Figure 1 below). This represents the most up-to-date analysis available and offers a clear like-for-like comparisons between pre-COVID levels in 2019 and post-COVID figures in 2022. These findings, which signal a notable rise in participation over recent years, are very encouraging for the marine tourism sector.

Key findings include:

- 13.2 million UK adults tried a boating activity in 2022, up 3% from 2021, and up from c.4 million pre covid (2018/19).
- Canoeing more than tripled its number of participants, from circa 1.7 million in 2019, to 6 million in 2022.
- Standup paddleboarding increased participation by more than 5 times, from circa 800,000 in 2019 to 4,100,000 in 2022.
- Kite surfing and Kite foiling registered large up-takes in participation, barely registering in 2019 to having circa 1.2 million (Kite surfing) and circa 80,000 (Kite foiling) people taking part in 2022.
- Over the period 2019 to 2022, participation in watersports within each age category was substantial, with participation for 16-34 year olds up 111%, +250% for 35-54 year olds, and +69% in the over 55s category.

There may have been a slight fall in these figures since, given the boom in staycations and people looking for new hobbies during the pandemic, however, clearly there has been a heightened recent interest in water sports as a whole. Further, RYA data on trends in watersports participation are noted in Figure 1 and 2 below.

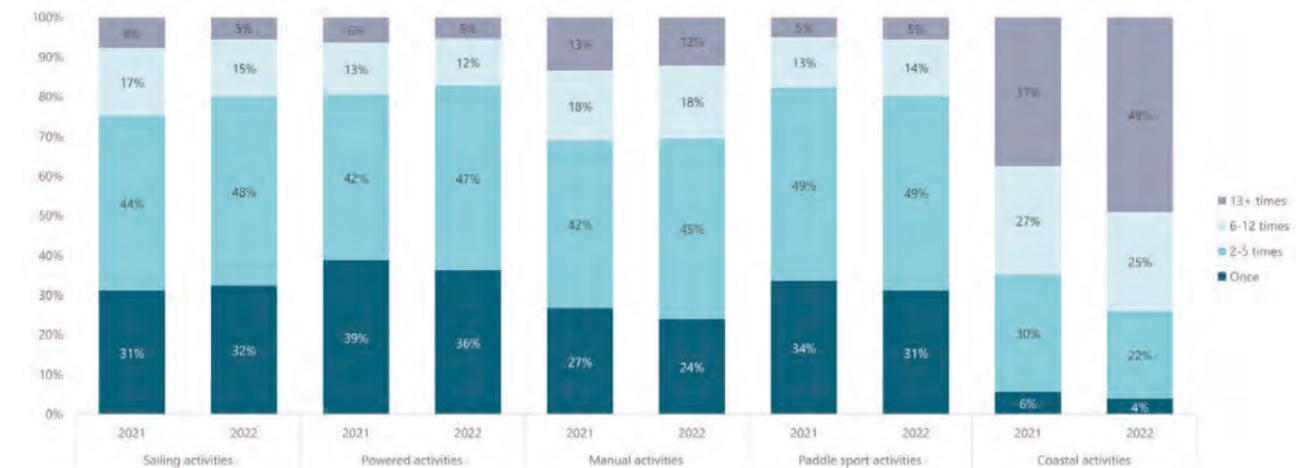
Figure 1: UK Watersports Sports Participation Data



Source: RYA (2023)

As noted, participation in watersports has grown substantially; however, increasing the frequency of participation remains key, as a significant proportion of individuals only take part once a year (see Figure 2 below).

Figure 2: Frequency of Watersports Participation



Source: RYA (2023)



New and emerging opportunities



Today there is a growing recognition of the contribution marine tourism makes to destination development in Scotland, as evidenced by recent growth deals that include support for marine tourism. For example, the Islands Growth Deal, and the growth deals for Argyll and Bute, Ayrshire and Tay Cities.

New opportunities are emerging from changing consumer behaviours, technological innovations, environmental concerns and a renewed interest in Scotland's coastal and inland waterways. If harnessed collectively, we believe these opportunities, can help secure Scotland's position as a world leader in marine tourism.

Growing participation in paddle and board sports presents a significant gateway into wider marine activities. The significant increases in participation in stand-up paddleboarding, kayaking and other accessible watersports has introduced new audiences to Scotland's blue spaces, creating opportunities to design pathways into sailing, boating and other marine pursuits. This trend offers a tangible route to broaden participation, diversify the sector's user base and encourage long-term participation in marine recreational activities.

The national focus on **Net Zero is accelerating investment in low-carbon infrastructure**. Developments in offshore wind, harbour upgrades, e-charging networks and clean propulsion technologies offer direct opportunities for marine tourism operators. By aligning with these wider transitions, the sector can enhance its sustainability credentials, reduce operating costs over time and strengthen Scotland's reputation for responsible and 'clean' marine experiences.

Wildlife tourism continues to grow as a defining strength of Scotland's visitor offer. Demand for high-quality, responsible wildlife experiences, from seabird colonies and seal haul-outs to dolphin and whale watching, creates new opportunities for marine tourism businesses. This growth also reinforces the importance of environmental stewardship and responsibility as a core component of Scotland's marine tourism distinctiveness.

Nature-based and blue-health activities are increasingly valued and sought after for their wellbeing benefits. Coastal walking, wild swimming, snorkelling, paddle sports and other active marine related activities all contribute to improved physical and mental health. Expanding access to these experiences, particularly in rural and island communities, can support inclusive tourism growth while enhancing local wellbeing and strengthening Scotland's wider health and social outcomes.

Rising interest in **community ownership and community wealth building** presents new models for developing marine infrastructure in remote and rural areas. Community-led marinas, moorings, pontoons and visitor facilities can help retain economic value locally, support year-round employment and ensure that development aligns with local needs and aspirations.

The continued **expansion of Scotland's cruise sector** also presents opportunities for deeper collaboration and co-investment across the wider marine tourism ecosystem. Improved port infrastructure, increased visitor numbers and stronger links between cruise operators, local businesses and leisure boating facilities can help maximise economic benefits while supporting sustainable destination development.

Finally, the evolving **labour market**, and desire for more flexible career options and transferable skills, creates an opportunity to design cross-sector career pathways spanning marine tourism, workboats, aquaculture, offshore energy and commercial fishing. Shared skills needs across these industries provide a strong foundation for collaborative training models that can attract new entrants, support workforce mobility and strengthen resilience across Scotland's marine economy.



Challenges

To realise the new and emerging opportunities, it is essential that we collectively renew our efforts to address ongoing and persistent challenges, not least easing access to investment funds. Scotland's tourism sector, including its marine tourism industry, has proven to be resilient and robust. However, it is often challenged by the everchanging landscape within which it operates and which is impacted by a mix of global, national, and local factors. These range from geopolitical instability to social and technological changes, as well as the hurdles that many small businesses experience in trying to access investment funds.



5.1 Economic and geopolitical pressures

- The war in Ukraine drove up global oil prices and whilst high energy costs remain a challenge for business, the need for energy security may pave the way for more opportunities for renewables and the wider marine sector.
- However, the Scottish Government's decision to abandon its 75% emissions reduction target by 2030 reflects other political pressures, as well as current technological limitations and the infrastructure shortfall needed to achieve net-zero by 2045.
- Ongoing global conflicts, including in Ukraine and the Middle East, have not only driven up energy costs but have disrupted supply chains and whilst inflation has now eased, the cumulative impact on disposable incomes is likely to continue impacting visitor spend.

5.2 Skills shortages and workforce challenges

- Scotland's marine sector faces a notable skills shortage, which deepened with the UK's exit from the European Union, and exists because of ageing workforce vulnerability.
- The end of freedom of movement between the EU and UK left 20-25% of Scotland's seafood industry vacancies⁵ unfilled, which in turn contributed to the population decline in coastal communities. It has also increased recruitment challenges in Scotland's tourism and hospitality sectors.
- A review by the Migration Advisory Committee identified several marine occupations, including shipbuilders and fishing boat operators, for inclusion in its Shortage Occupation List⁶ (SOL). Although SOL has since been replaced with a new more limited Immigration Salary List (ISL) the occupations of shipbuilders and fishing operators for Scotland currently remain on the new list.
- In 2024, 15% of Scottish employers reported a skills gap⁷, with 64% reporting this was impacting business performance, with 66% expecting to upskill employees in the coming year.
- Recent BMS research has highlighted the industry's ageing workforce, and the growing need for new entrants to be able to replace retiring professionals.
- Innovation in green technologies and the growth in artificial intelligence is driving demand for new skills, particularly to transition the marine fleet to clean propulsion systems. This shift requires significant investment in training, infrastructure, and expertise to support the adoption of greener technologies and the growing role of artificial intelligence.

To bridge the skills gaps and overcome the wider workforce challenges, BMS is focussed on highlighting the areas that need to be improved, including the visibility of the sector, wages, upskilling, appropriate and accessible training etc, to ensure future generations of professionals will be attracted to, and stay within, the marine sector.

⁵ See here: Marine economy skills shortages - Harper Macleod LLP

⁶ See here: Review of the shortage occupation list 2023

⁷ See here: Regional Skills Assessments - Skills Development Scotland



Developing the way forward



BMS undertook an extensive engagement process in the development of this framework to identify its strategic priorities.

We are grateful to all those who participated in the engagement process, including:

- RYA Scotland
- VisitScotland
- The University of the Highlands and Islands
- Scottish Canals
- Crown Estate Scotland
- Skills Development Scotland
- Scottish Tourism Alliance
- Scottish Government via Cross Party Group

Part of the process also included consulting private sector operators, and that was followed by a feedback and discussion session with BMS's Board.

In summary, consultees reflected on the previous framework, Giant Strides, noting much of it remains relevant to today's marine landscape, including its emphasis on company sustainability, as profitability within the sector continues to be challenging. There was widespread agreement that protecting and preserving the seas must always be the cornerstone of any future marine tourism strategy. The growing importance of paddle and board sports was also noted by consultees who commented on their importance for encouraging wider participation and showing that marine tourism extends beyond sailing and motorboating.



Other issues highlighted, which potentially offer new opportunities ahead and have informed the four core themes of this new framework, are summarised below:

6.1 Net zero and clean seas

It was no surprise that Net Zero emerged as a key issue during the engagement process and why this new strategic framework, Giant Opportunities, emphasises its significance for marine tourism. In contrast, our previous framework, Giant Strides, only made a brief reference to the climate and nature emergency. These facts reflect both the change to the environment and the growing political prominence of Net Zero since its publication in 2020. Giant Strides was published only a few months after Royal Assent was given to the Climate Change (Emissions Reduction Targets) (Scotland) Act 2019 which enshrined Scotland's target of reaching Net Zero by 2045 in law.

Whilst there was recognition that further progress is needed to exploit the new opportunities and savings that can be realised through the transition to Net Zero, marine activities are generally already low carbon⁸. Furthermore, it was thought that our sector could work well alongside today's national environmental aims, by driving economic value from Scotland's natural assets, and crucially in way that is sustainable i.e., the marine sector can co-exist with the natural environment.

It was also noted that the recyclability of production materials is an important research area that the marine tourism sector could contribute to in partnership with local authorities and the Scottish Government e.g., the recyclability of plastic used in boats.

To improve the sustainability of Scotland's existing recreational fleet and maximise opportunities will require more proactive and coordinated planning around the management of the end of life of vessels. By working collaboratively to explore innovative approaches now, the marine tourism sector could help transform the growing problem of abandoned boats into an opportunity that will not only support new economic activities but also protect and enrich Scotland's coastal and marine environments.

Key growth sectors such as offshore energy and the development of improved marine facilities provide potential avenues for alignment for the marine tourism sector, who could investigate opportunities for sharing marine assets, such as marinas and harbours.

Wildlife tourism was also noted as an increasingly important component of Scotland's marine offer. Visitors are drawn to Scotland's seas, coasts and islands to experience its rich and diverse wildlife, from seabirds and seals to dolphins, whales and basking sharks. Wildlife watching supports a wide range of operators - from specialist boat tours to community-run initiatives – and plays a role in extending the visitor season, encouraging domestic family visits, as well as appealing to international visitor markets. Ensuring this activity is delivered responsibly, in line with wildlife watching codes, helps safeguard Scotland's natural capital while strengthening the distinctiveness and sustainability of the marine tourism sector.

⁸ A Ricardo study 'Pathways to Propulsion Decarbonisation for the Recreational Marine Industry' (2023) found that the marine industry accounted for just 0.4% of total transport CO2 in the European Union.

There was also strong consensus that the sector should continue to prioritise and advocate for clean seas, given that protection of the natural marine environment is critical to the marine tourism offer. A careful collaborative approach needs to be taken to ensure the increased use of the seas by other marine activities, such as aquaculture or offshore energy operations, do not negatively damage the environment nor hinder the freedom of navigation that the marine tourism sector depends upon.

6.2 Nature-based activities and blue health

There is widespread agreement that Scotland's marine and coastal environments play a central role in its tourism offer. Today nature-based and blue-space experiences drive a large share of visitor interest and spending. Research shows that activities such as coastal walks, snorkelling, wildlife watching, and community-led marine initiatives are increasingly sought after for their recreational and educational value, while also supporting local economies and sustainable tourism development. These trends highlight the growing importance of placing high-quality, accessible blue-space experiences within any future marine tourism strategy.

Evidence also shows a strong link between engagement with the sea and waterways and improved physical and mental wellbeing. Coastal environments provide accessible, low-cost opportunities for exercise, stress reduction, outdoor learning, and family activities - benefits now widely recognised as "blue health." To fully realise these wellbeing and economic gains, the sector should consider how improved access, facilities, and structured nature-based activities can strengthen both visitor experiences and broader community wellbeing. **Integrating blue health principles into strategic planning will help ensure Scotland's marine tourism continues to grow sustainably**, while also enhancing public health and connections to the natural environment.

This framework will look to act as a basis for deeper engagement with nature-based marine tourism operators, recognising this as a growing area within the sector.

6.3 Community and place-based approach

Adopting a community and place-based approach holds significant potential, particularly in rural and remote parts of Scotland. Consultees highlighted the challenges of achieving commercial viability for many small marinas around Scotland while noting the strong community benefits that the sector can help secure. The sector should continue to align itself closely with the principles of the Scottish Government's Community Wealth Building, including the focus on community or third-party ownership, the retention and circulation of wealth locally, and short supply chains. It was noted that community ownership can generate a multitude of opportunities in places where there isn't necessarily private sector demand for ownership due to the tight/limited commercial returns available.

6.4 Skills development

The engagement process highlighted the depth of concern about the ageing workforce and the lack of young people entering the marine tourism sector. There is an urgent need to establish a pipeline of skilled workers to replace those leaving / retiring from the sector. Moreover, it is essential those new entrants are equipped with future skills, for example in new battery technologies and alternative fuels, with training to safely install and maintain clean propulsion systems. Addressing the future skills gap will be essential to ensuring the sustainability of the marine tourism workforce, without which the sector will struggle to harness the giant opportunities ahead. New collaborative approaches to training need to be considered, especially as so many of Scotland's marine businesses are small businesses that, whilst ambitious to expand, have very limited capacity to take on and train new entrants.

Given the significant overlap in technical and practical competencies across marine-based industries, closer collaboration with sectors such as workboats, aquaculture and fishing would also be beneficial, enabling the development of shared training pathways, more efficient deployment of specialist skills, and clearer progression routes across interconnected marine careers.

6.5 Pathways into the sector

There was also acknowledgement that the current image of marine tourism may deter new entrants from seeking a career within the sector. There was recognition of the need to design and promote clearer and more attractive pathways for school leavers, college graduates, and other potential entrants, and to highlight the various entry points and career progression routes. It was thought that reframing the image of the sector will be critical to help to tackle the skills shortage. For example, this framework highlights activities such as paddle and board sports, as these are often viewed as more inclusive and accessible than other traditional marine activities such as yachting.

6.6 Reinforcing the sector's professionalism

Concern was expressed about the employees within marine tourism being potentially undervalued in terms of their wages versus the value of their activities. For instance, boat mechanics often earn less than car mechanics, despite working on higher-value assets. The blurring of voluntary and paid work was also noted as a barrier to professionalising the sector, with some work viewed as more of a hobby than part of a professional career path.

It was agreed that raising quality standards and service levels would be essential to reinforce the professionalism of the sector and secure wider recognition for the contribution it makes to both the wider tourism sector and the national economy.

Objectives and Actions

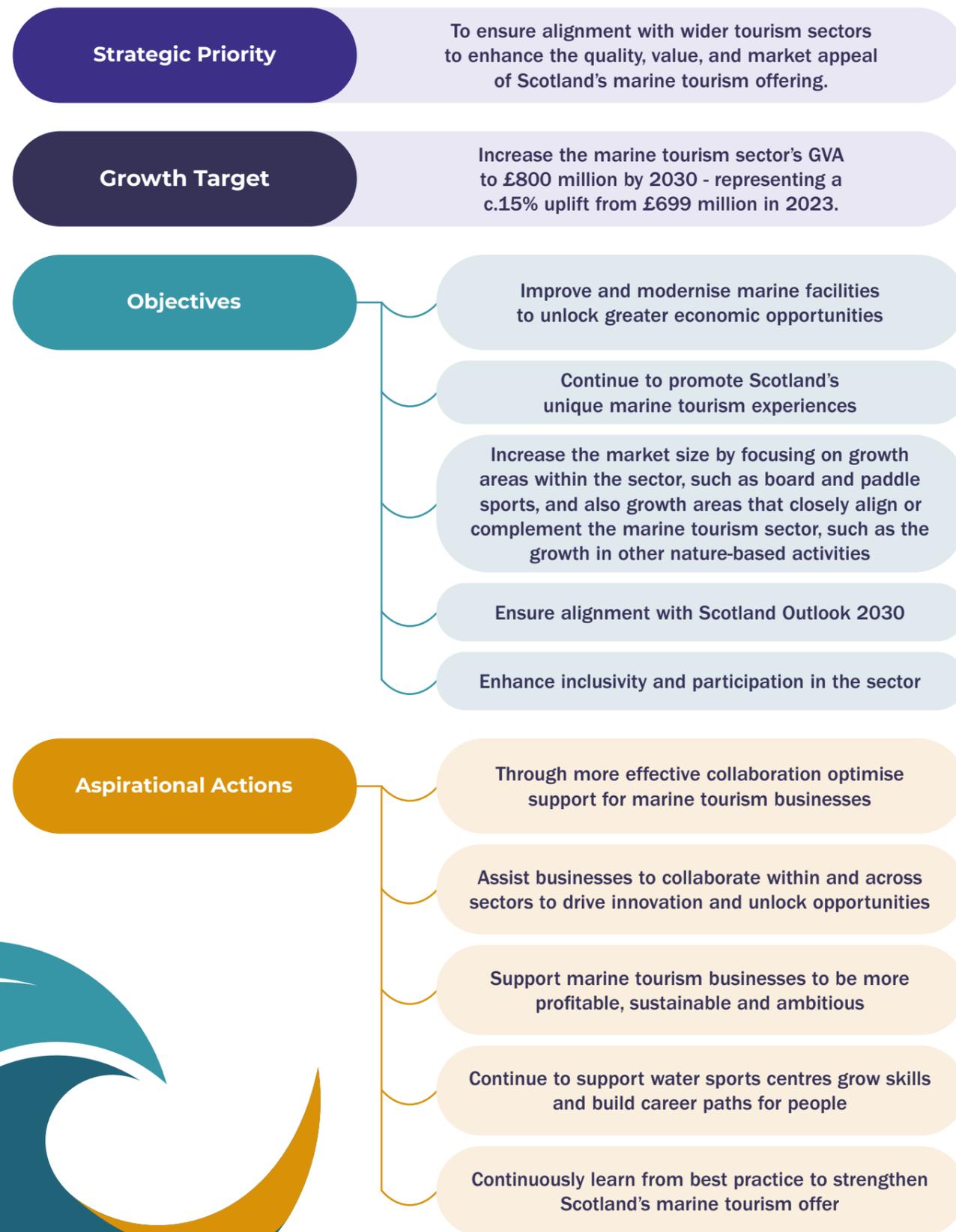
This section outlines the refreshed objectives for Scotland's marine tourism sector, set out under **four core themes**. Together they reflect the policy and market changes since 2020, as well as the ongoing challenges and the recent feedback from industry summarised earlier in this document.



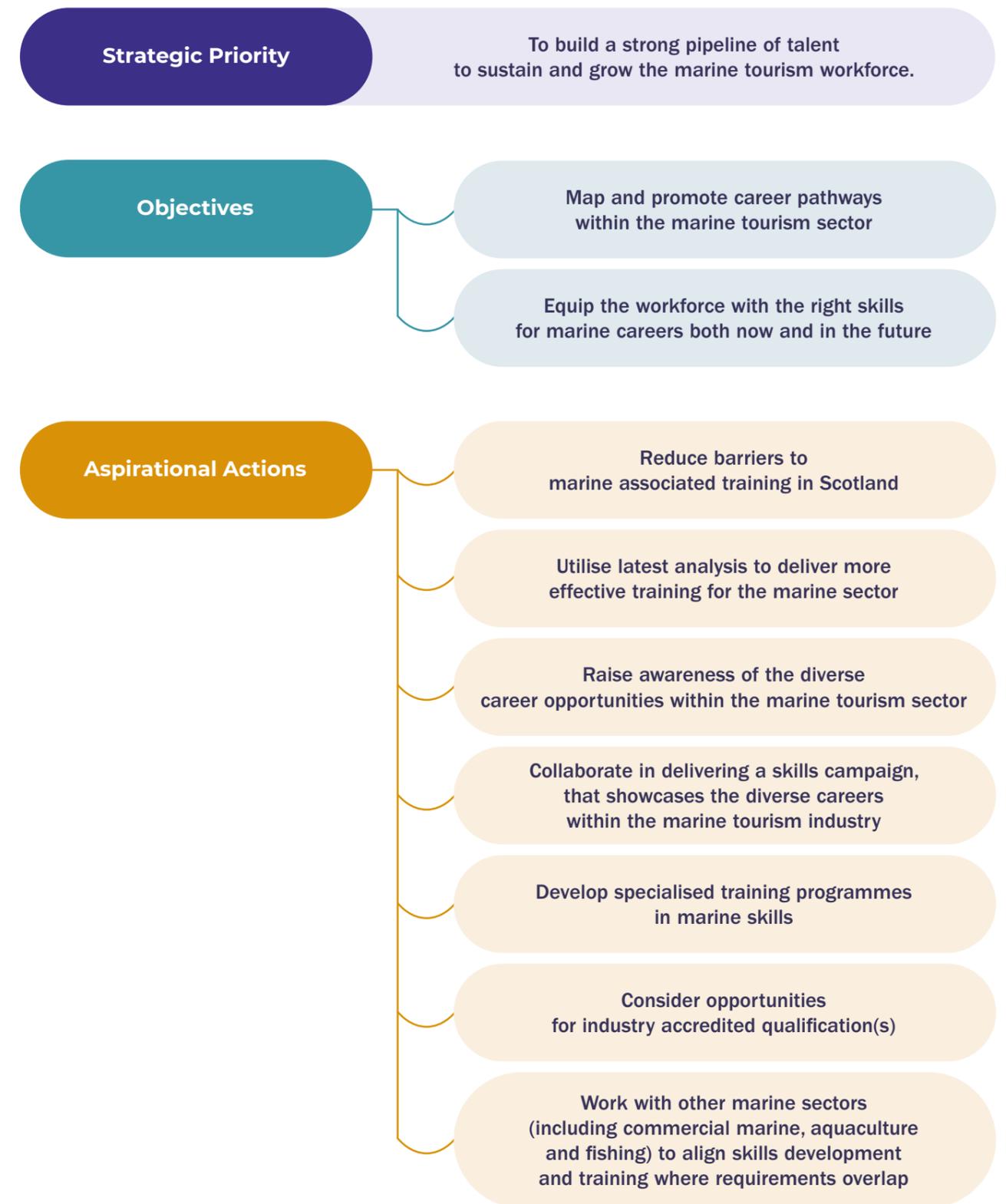
This section also sets out **aspirational actions** which we believe are required to realise the vision of Scotland as a world leader in 21st century sustainable marine tourism. Most fall outside the direct control of any one organisation but **represent critical areas for collective effort**.

BMS will continue to advocate for, support and influence these actions wherever possible.

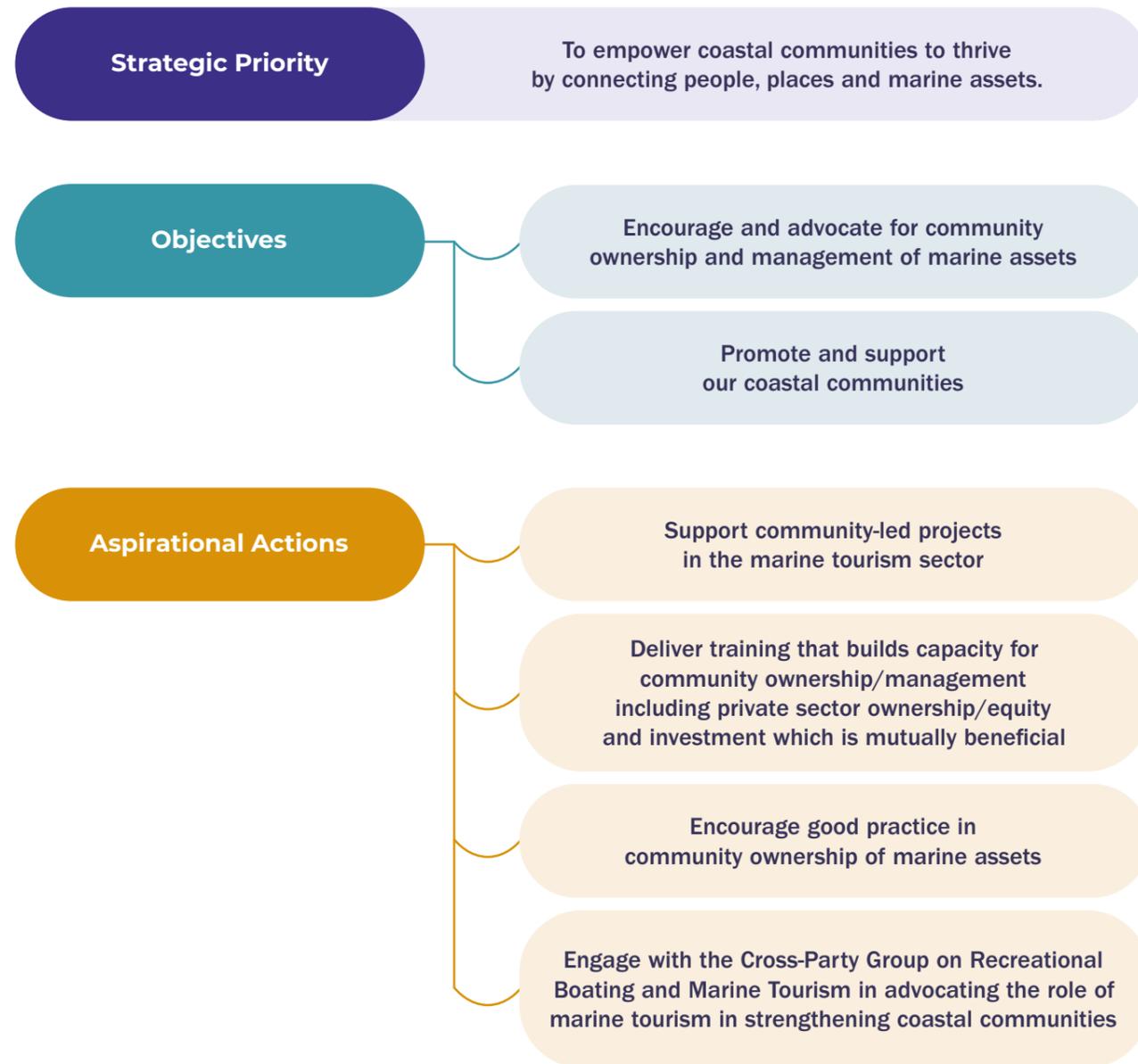
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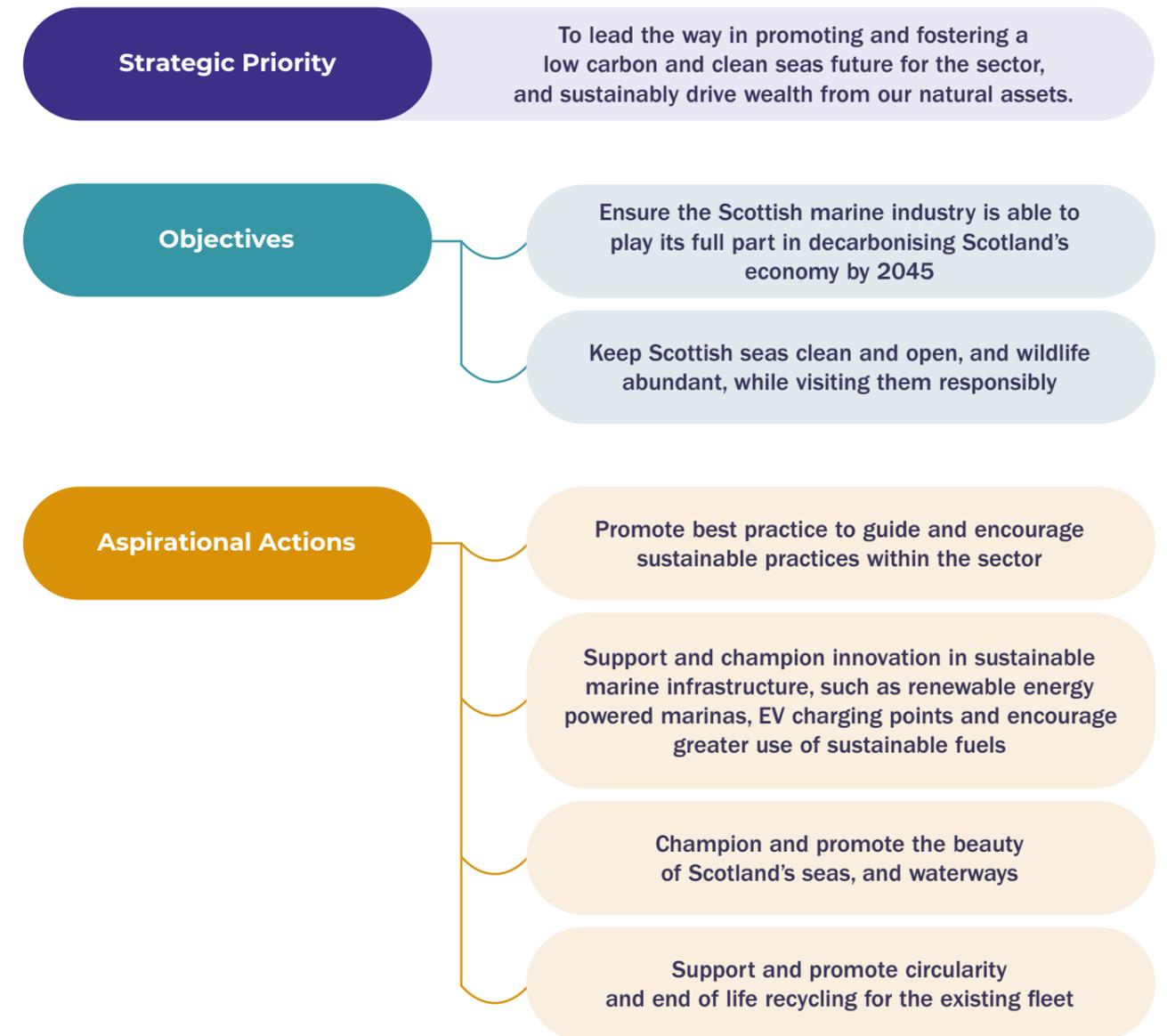




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Giant Opportunities 2026 – 2030:
A strategic framework
for Scotland's marine tourism sector

This framework has been developed by BMS in conjunction with RYA Scotland and Scottish Canals and funded by Crown Estate Scotland. It captures views from the Scottish leisure marine trade and other stakeholders on the priority themes that need to be collectively progressed.

If you would like to help advance marine tourism in Scotland, or have any queries about this strategic framework, please email us at

Scotland@britishmarine.co.uk