



Measures to Develop Marine Leisure for Promotion of Marine Tourism



Marine Leisure
Division, Ministry of
Oceans and Fisheries

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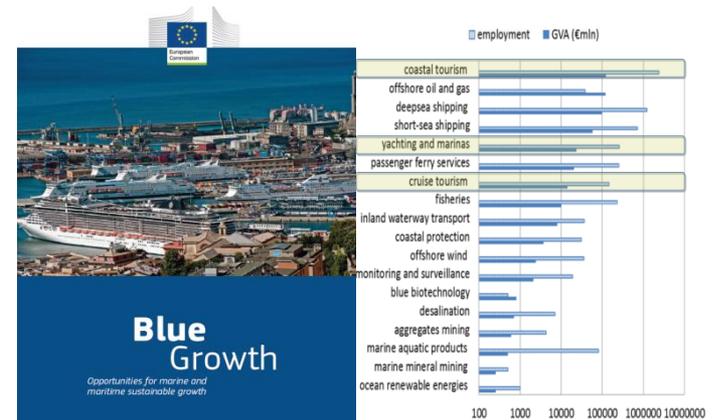


Tourism Trend and A Window of Opportunity Presented by Marine Leisure

Change in Global Tourism Market

● Growth of Marine Tourism Market

- Selected marine tourism as a new development subject (EU)
- Support sustainable tourism development of marine spaces (UNWTO)
- Focus on Beach tourism, cruise, marina and yacht



Global Marine Tourism Market (UNWTO): 50% of the Entire Tourism Market

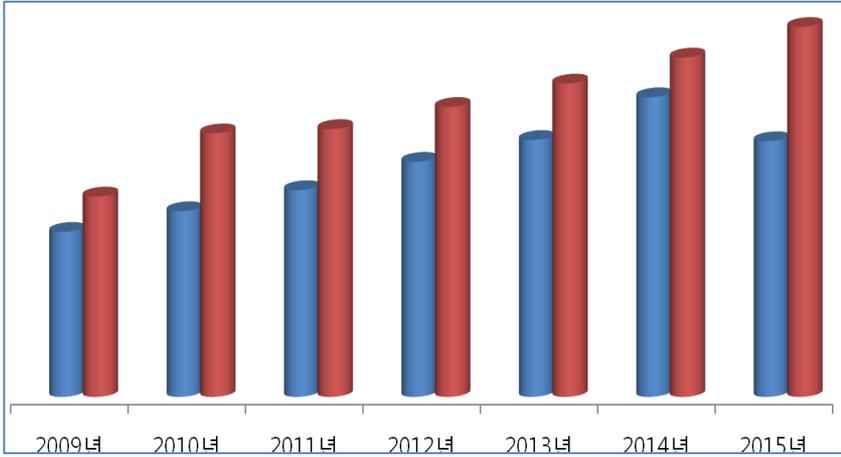
SUSTAINABLE MARINE TOURISM

Expert Group Meeting on Oceans, Seas and Sustainable Development: Implementation and follow-up to Rio+20



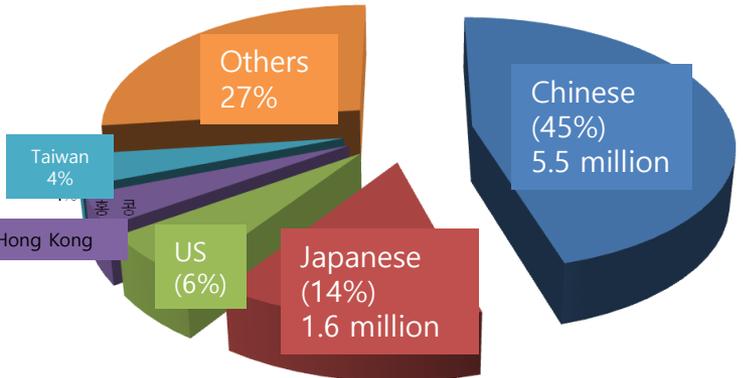
Seaside resort, cruise, skin scuba, eco-healing tourism are expected to grow

Change in Domestic Tourism Market

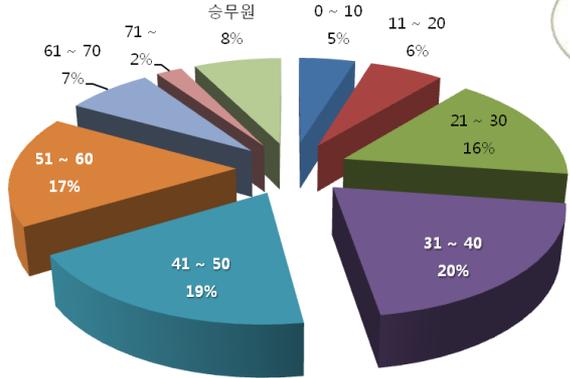


- Tourists in 2015
 - Entry : 12 million
 - Exit : 17 million
 - Tourism Profits (November) : -492 million USD

Tourists into Korea in 2015



Korean Visiting Overseas in 2015



※ Improving competitiveness of domestic tourism market, developing new tourism resources ▶ “Marine Tourism”

Change in Domestic Tourism Market

Marine Tourism = Beach Visitors : 98 million
Beach?



- Increase in Tourists in Marine Tourism
 - Beach(98 million), Coastal Ferry/Island Area(11 million), Cruise(880,000),
 - Leisure activities concentrated on beach, overpopulated/crowded/safety accident

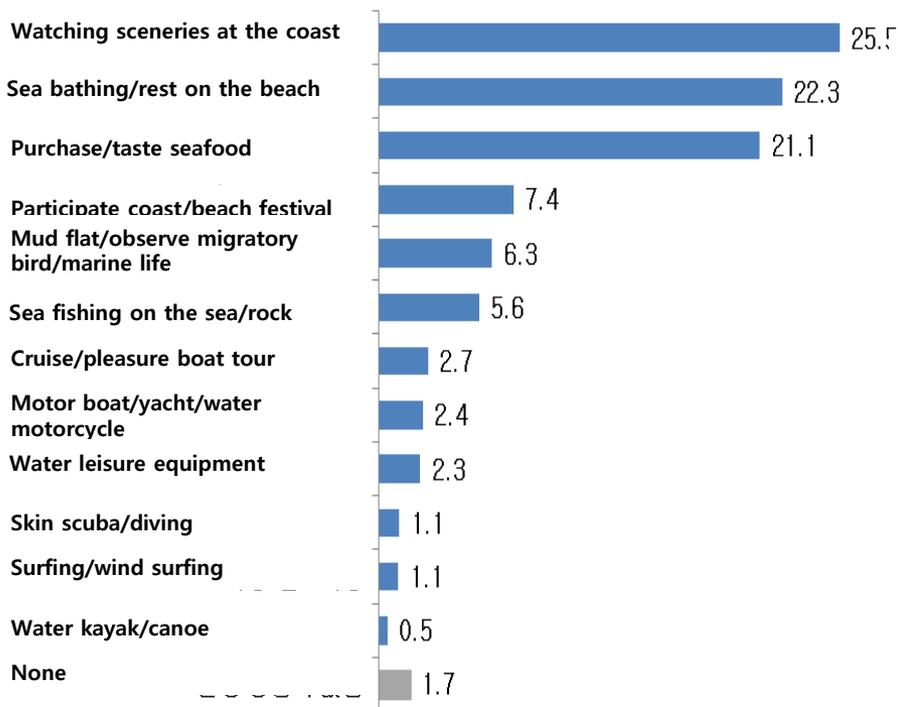
Marine Leisure: Changes and Challenges



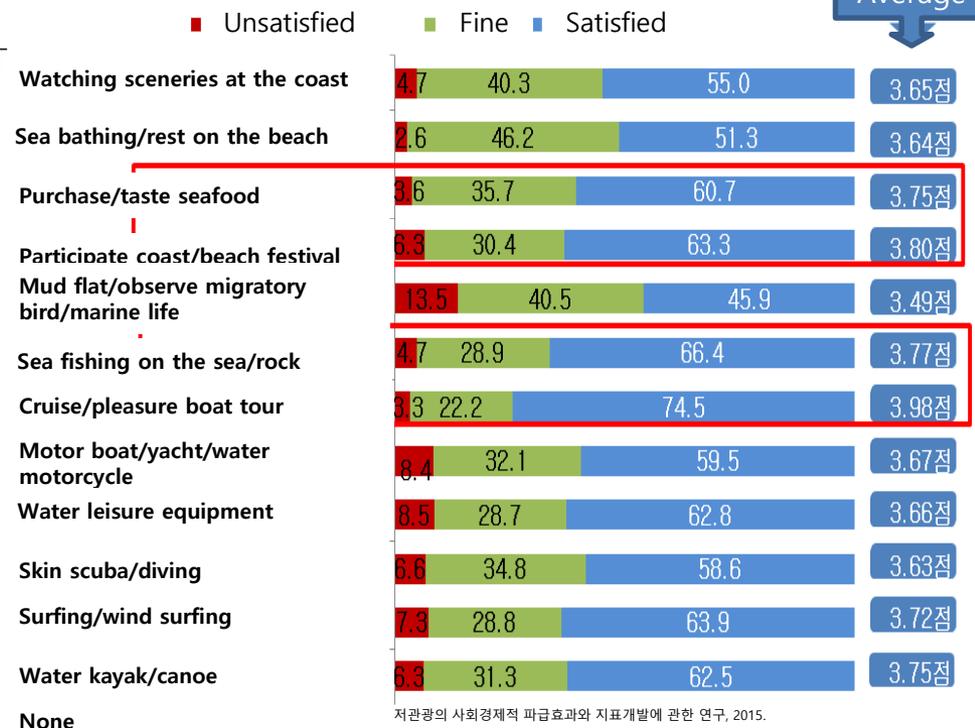
Trend in Domestic Marine Leisure

● Types of Marine Leisure Activities

* Experience in Marine Leisure Activity



* Satisfaction to Activities



※ Large share of beachside sceneries and sea bathing, High satisfaction for marine leisure sports participation

Trend in Domestic Marine Leisure

● Marine Leisure Activity Population

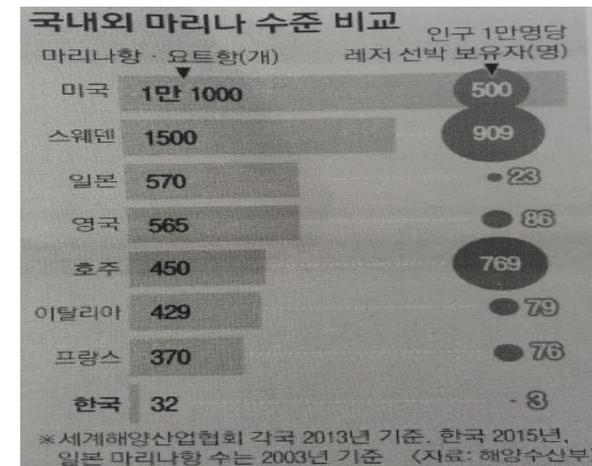
- According to statistics by Korea Council of Sport for All, marine sector (skin scuba, yacht, canoe, wind surfing) account for less than 0.5% in regions/work places among 131 sports.

Sports	합계		지역		직장	
	Club	Member	Club	Member	Club	Member
131 events in total	111,138	5,389,696	106,436	4,928,204	4,702	461,492
Skin Scuba	312	9,264	302	8,957	10	307
Yacht	85	1,953	84	1,952	1	1
Canoe	118	8,334	93	4,375	53	157
Wind surfing	180	10,017	1	23		

● Marine sports competitions (2016)

- A variety of sporting events, athletes + the general public, games+ play, safety incidents, awareness?, popularity?

- Yacht, canoe, underwater finswimming triathlon, dragon boats, ocean swimming, rubber boats and motor boats



Policy Environment for Domestic Marine Tourism/Leisure

● Marine Tourism/Leisure Cultivation Policies



● Establishment of Ministry of Land, Infrastructure and Transport(MOLIT)/Ministry of Agriculture, Food and Rural Affairs(MAFRA)(2008)

- MAFRA : Working on fisheries village tourism, sea fishing, fisheries village tour project

● Reestablishment of Ministry of Oceans and Fisheries(2013): Marine Leisure Division newly established under Ministry of Oceans and Fisheries

- Transfer of tasks related to marine leisure, Implementation of the existing work of existing MOLIT and MAFRA



Policy Environment for Domestic Marine Tourism/Leisure

- Working on Marine Tourism/Leisure Cultivation Policies –
Government Agenda :“Creation of new maritime growth engine and systematic management of marine sector
- Expanding foundation of marine tourism, cruise tourism industry, nurturing marina industry

“Create new marine growth engine”

“Create new jobs”

“Develop coastal areas”



Employment per 1 billion expenditure on Tourism in Korea

Industry average : 13.4



Policy Environment for Domestic Marine Tourism/Leisure

● 제2차 해양관광진흥기본계획 수립(2014~2023)

비전 품격과 매력이 넘치는 동북아 해양관광허브 실현

정책과제 ◆ 문화와 예술이 있는 아름다운 바다관광

◆ 체험과 학습이 있는 즐거운 바다관광

◆ 생활속에 이야기가 있는 정겨운 바다관광

◆ 휴식과 회복이 있는 행복한 바다관광

◆ 세계인이 찾아오는 글로벌 바다관광



Marine Leisure Policies: Present and Future



Vision for Marine Leisure Policies (2014~2020)



VISION

Achieving Happiness and Creative Economy
by Promoting Marine Leports!

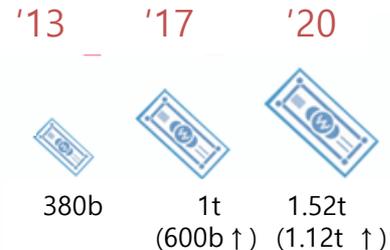
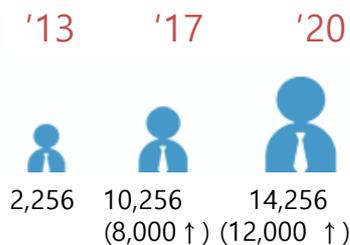
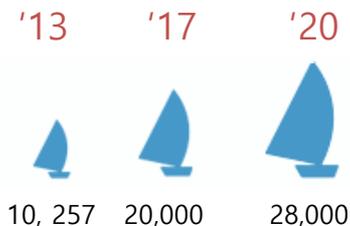
<YachtBoat>

<Job Creation>

<Added Value Creation>



Goal



Strategy

1. Secure marine Leisure infrastructure

2. Nurture marina industry

3. Expand marine leisure sports

4. Promote underwater leisure industry



Detailed Tasks

- Developing marina port facility
- Securing marine leisure facility
- Developing underwater infrastructure

- Promoting marina service
- Supporting leisure vessel manufacture
- Nurturing marina talents

- Promoting beach use
- Expanding and diversifying class
- Expanding support on marine sports

- Establishing legal basis for underwater leisure industry
- Supporting events including diving
- Developing a model for mutual expansion

Plan for Marine Leisure: Creation of Demand

Market creation for marine leisure



- Support for creation of a new marine leisure market
 - Intensive investment in marinas, cruises and underwater leisure
 - Develop potential users into enthusiasts of marine leisure

- Enhance competitiveness of marine leisure
 - Specialized business such as marine tourism, rental service and transportation
 - Business model for success/ reduction in starting up business

- Stimulate expansion of marine leisure infrastructure
 - Refining regulations and legal framework including those applied to investment in sites
 - Introducing a regulation-free zone & building a cluster



Support for building a business model to increase industrial competitiveness
Improve systems to enhance demand for marine leisure

Securing Marine Leisure Infrastructure: Constraint (1)

Current Status

- Only 13% of maintenance facility(2000) out of registered leisure vessels (15000)
- Lack of marine leports education program particularly in inland areas

Support

- Securing resources and facilitating development through cooperation between the central and local governments and the private sector

① Development of Marina Port Facility

- 6 hub marina port development (~'19)
- 16 fisheries village marina development for fishing port development('15~'17.3 plot part)



② Establishment of Marine Leisure Facility

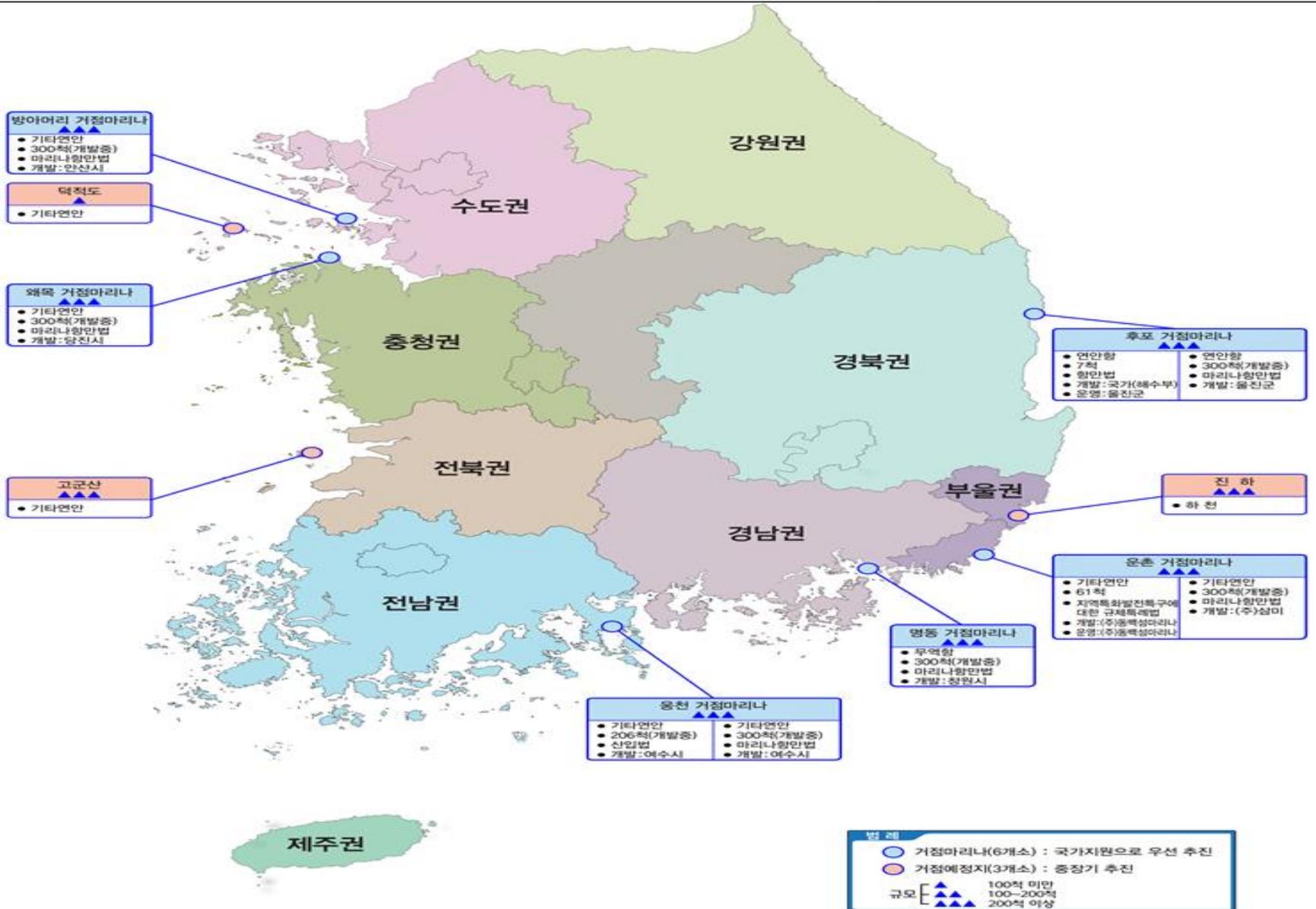
- Establishment of 4 marine leports center in Yeosu, Sangju, etc (~'17)
- Establishment of 7 resort facilities in unused land in Pohang, Goheung (~'17)



③ Development of underwater leisure infrastructure

- Establishment of underwater park (~'17, in Gangneung)
- Construction of underwater scenery area and diving center(mid-long term)





Strengthening Foundation of Marine Leisure Business

Current Status

- Lack of marine leisure business models
- Low competitiveness of the marine leisure manufacturing industry



Anchor/Management of Leisure Boat

Leisure Boat Manufacture

- Poor environment for leisure boat use in marina
- Immature marina service: limits in diversification
- Lack in relevant services with marina facility use

- Export Competitiveness
- Technology Competitiveness
- Domestic Market
- Government Support



Measures for Improvement

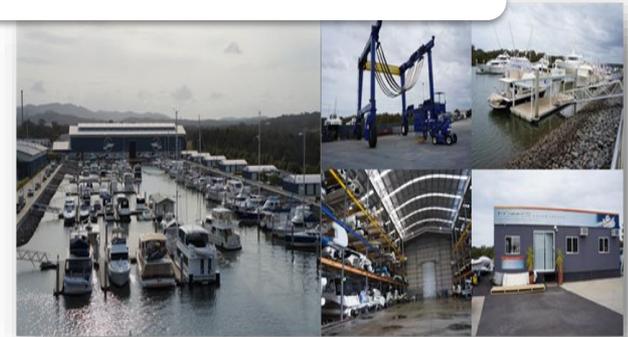
- Establishment of industry foundation to promote marine leisure

Support to Boost Marina Leisure: Infrastructure → Content

- Securing industrial foundation for the marina service industry
 - ▶ Enhance competitiveness of leisure boat manufacturers by supporting production of super yachts and development of workforces
 - ▶ Designate marine leisure special zone and marina business center

- Repairing small-scale marina/fishing port
 - ▶ Use port/fishing port repairing project: build marina stations in 16 fishing villages
 - ▶ Integrate leisure tourism into fishing village experience programs such as diving centers and contracted operation of beaches

- Improving conditions for introduction of marina service business
 - Support creation of leisure boat storage/repair/sales business (64)
 - Promote leisure boat rent business/club/marina berth sales
 - ▶ Enhance business environment by improving leisure boat registration check, and decreasing insurance fees





Promoting Popularization of Marine Leisure Tourism (1): Experience → Participation

Current Status

- Enhance public awareness of marine leisure
- Increase opportunities to participate in marine leisure activities



Measures for Improvement

- From my Car To my yacht

- Address inconveniences in marine leisure and spread water-related culture
 - Prejudice of being far, expensive and burdensome)
 - Expand marine leisure and safety education program for youth



- Reduce inconvenience of using marine leisure
 - Distribution of sea routes map and e-navigation and reduce the acquisition and registration taxes
 - Introduce a variety of financial products related to leisure boats/purchase/lease



Expand marine-friendly culture ⇒ Secure demand ⇒ Create a market



Promoting Popularization of Marine Leisure Tourism (2): Provide Events and Globalization

- Improve support system for marine sports competitions
 - Expand and improve marine sports competitions: sophistication, specialization and professionalization
 - Support participation in or host international marine sports competitions (star marketing)

- Improve basis for marine sports activities by growing enthusiasts
 - Support leisure sports club at elementary/middle/high school, university and businesses
 - Hold marine leisure festivals and **provide intensive training on marine leisure**

- Establish a network for marine leisure tourism
 - Portals to provide marine leisure information including information on yacht berths and marine leisure products
 - Build a global network including marinas in South East Asia (one-stop port/service)

America's Cup



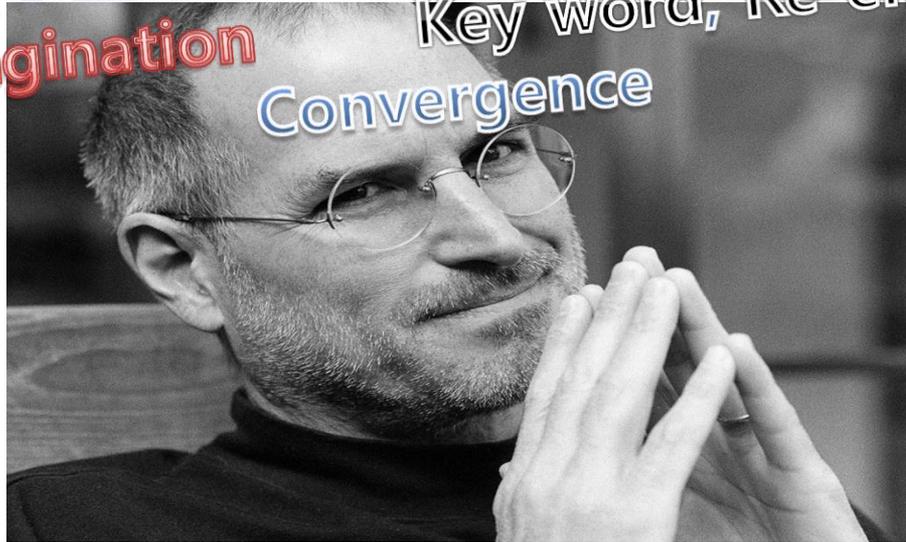
Intensive support for selected areas ⇒ Star marketing ⇒
Expansion of marine leisure boom

NO FUTURE FOR MARINE LEISURE?

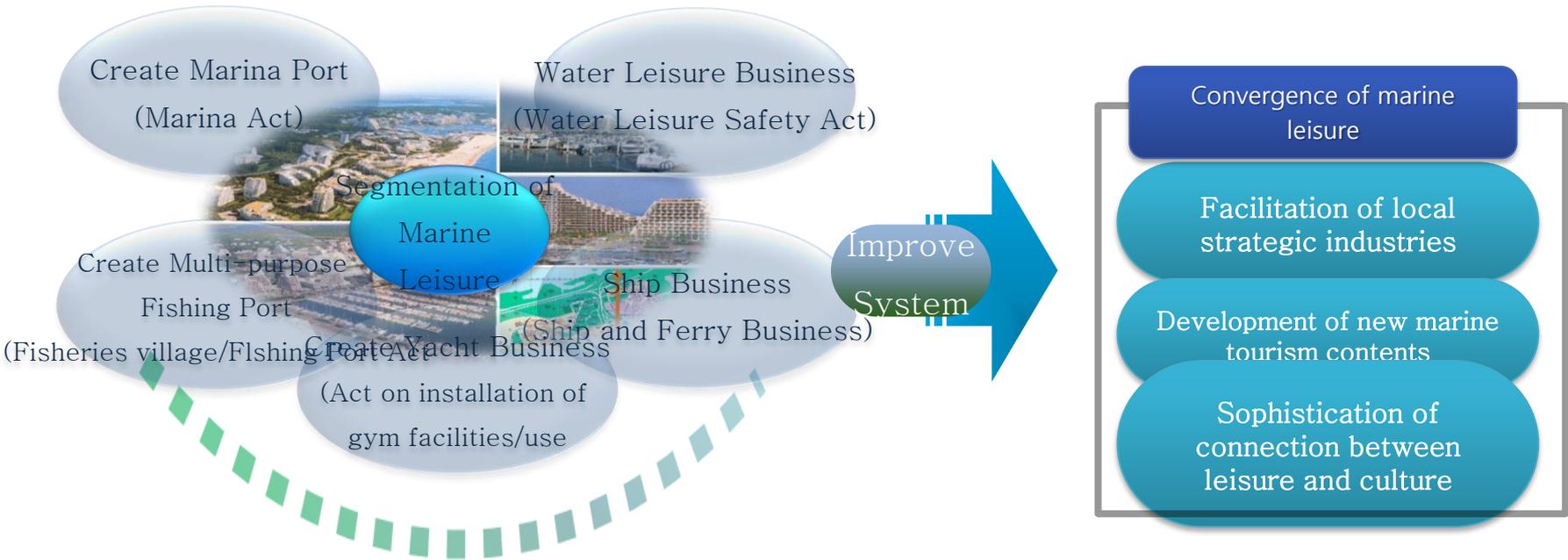
Imagination

Key word, Re-entry

Convergence



Future Growth of Marine Leisure: Convergence



Converging Cultivating Policies on Marine Leisure Tourism

- Introduce a platform to facilitate connection between marine leisure industries
 - (Provisional name) Consider enactment of marine leisure tourism support act, simplify regulation and legislation process)
 - ▶ Introduce regulation-free zone, designate marine tourism area, set marine tourism week
 - ▶ Build undersea scenery zones and marine healing tourism zones

- Introduce a strategy to converge hybrid marine leisure
 - Build ecosystem to facilitate industries for growth of marine leisure: form a marina industrial cluster
 - Develop marine leisure into a local strategic industry: ex] shipbuilding + marine leisure
 - Converge content ·space·technology : sports/culture/festivals, islands+ inland, WIG ships



▶ Try policy convergence to create ecosystem for marine leisure tourism

“Marine Powerhouse Korea”



By enhancing marine leisure industry,
we will drive economic growth
and create more jobs.

Thank You