



The Cool Route Marketing Strategy



Acknowledgments

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Introduction

Introduction – The Project Funding, Partners and Roles

The Cool Route project is funded under the European Union Interreg VB Northern Periphery and Arctic Programme 2014-2020. The project is led by the Hincks Centre of Entrepreneurship Excellence, in Cork Institute of Technology and has a total of eight partners, located in each of the participating countries which adjoin the Route.

Each of the project partners has a distinct role in the project, each workpackage (WP) and task is supported and developed by inputs from all partners.



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Commercialisation



Western Norway Research Institute
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Tourism Policy

The project is greatly assisted by a range of Associate Partners, many of whom have national development roles in tourism and sailing activities and bring a significant level of expertise to the overall partnership.

The project's associate partners are:



Donegal Tourism Ltd



Sail Scotland



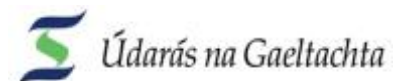
RYA Scotland



Irish Sailing Association



British Marine Federation



Údaras na Gaeltachta



Irish Cruising Club



The Crown Estate



RYA Northern Ireland

The Cool Route Map





Executive Summary

Executive Summary

The Cool Route project, funded by the European Union's Northern Periphery and Arctic Programme addresses the promotion of yacht, superyacht and small liner cruising on the coastal waters of North West Europe, stretching from Co. Cork on the Southern coast of Ireland, around the West and North of Ireland, Western Scotland, The Faroe Islands and Western Norway.

The objective of the Cool Route project is to bring new business opportunities to peripheral communities and enterprises which are located on these highly scenic coastlines, offering a wide range of things to experience, activities and places to see.

Within all of these waters are extensive cruising grounds, which are situated in some of the most scenic areas globally and in proximity to the richest European resources in terms of history, culture, heritage, wildlife, cuisine, traditional music and folklore.

One of the first main tasks completed in the development of the Marketing Plan, was to undertake a **Cruising Preferences Study**, examining the needs and preferences of the yacht cruising community. With over 500 responses, from throughout the British Isles and beyond, the study represents the most comprehensive engagement of its type ever undertaken with a sailing community in Europe. The findings of the study, which include a large amount of qualitative comments, highlight the potential of the Cool Route, its attractiveness to sailors, an optimum daily voyage distance and a ranking in terms of stopover facilities. These inputs led the project partners to adopt a minimum route standard, aiming to achieve a dry step ashore facility every 25 nautical miles.

The second extensive study undertaken was the **Route Traffic Study**. The Route Traffic Study had two main objectives, the first to identify the main source market locations of vessels within a two day sail of a point on the Cool Route and secondly to estimate vessel numbers and to set market targets. The Traffic Study identified that within the route are based on estimated 18,000 cruising yachts (sail and motor), which could be more frequently voyaged to bring business to local communities. The route's most important external source markets are the Western and Southern coasts of England, Wales, Northern and Western France, Netherlands, Belgium and Germany. It is estimated that a total of 150,000 cruising vessels are located within a two day voyage of some location on the Cool Route. Cruising sailing is estimated by this study

to have a current value of €131 million annually to local enterprises on the Cool Route and the route attracts only a small percentage of its potential market.

The third study undertaken as part of the work of developing the Route Marketing Plan, was the **Superyacht and Small Liner Study**. Observed vessel movements in 2015 and 2016 indicated an increase in superyachts sailing the Cool Route. This increase in activity was thought to have potential connections with social and political issues in areas of the Mediterranean, together with growing security concerns in some of the world's most prominent cruising areas.

The study on superyachts was undertaken with the assistance of a focus group of superyacht skippers. The methodology used included direct interviews and an online questionnaire.

The outcome of this study strongly indicated that superyachts were actively in search of new locations to cruise, that these highly self-contained vessels did not require any facilities additional to these already identified, such as a small landing pontoon or sound pier step and waste recycling/disposal facilities.

The advice of the skippers, who are important influencers in planning voyages of superyachts, was for Cool Route to make an early market entry. The medium recommended to attract more visits in 2017 was the production of a high quality Cool Route shell brochure to be circulated widely via the superyacht skipper community. This brochure could also have potential for use in the small liner sector.

Having identified the main market sources and quantified the potential market size, the Marketing Plan proceeds to set out a number of key strategies aimed at increasing traffic sailing the Cool Route.

The Marketing Plan also acts as an important input to the development of the **Route Business Plan and Realisation and Commercialisation Strategy**.

The Route Business Plan will be completed by mid-2017 and will undertake a more detailed economic analysis of the impacts of the overall sailing and boating sectors to local economies. Cruising only represents one part of the overall leisure craft fleet.

The Route Business Plan will engage with local enterprises throughout the route – to assist these local operators to capture more sea-borne business opportunities. The project has identified providers as being comprised of enterprises which are either (a)

directly involved in marine service or (b) ancillary services, offering everything, from food and drink to activity pursuits.

Workshops and focus sessions with enterprises will examine existing opportunities for the establishment of new businesses and also opportunities for existing enterprises to extend the range of services they currently offer. These new services may be the establishment of new facilities such as chartering operations, new marinas, pontoons or moorings; as well as provision of new services, such as waste disposal, cafes or activities and things to do and see.

The Commercial and Realisation Strategy for the participating regions, will provide a transmission mechanism for the route to move to a fully commercialised entity, driven by and operating within the parameters of the overall and regional tourist economies.



The Cool Route – World Class Cruising Grounds

The Cool Route – World Class Cruising Grounds

The Cool Route is that part of Europe's North Western seashore between Cork in Southern Ireland, via Western and Northern Ireland, Western Scotland, the Faroe Islands and then to Tromsø in Western Norway.

Mile for Nautical Mile, the Cool Route boasts a wealth of archaeological, historical, cultural, musical and culinary treasures and experiences, complemented by its amazing scenery, mountainous shorelines, the best pubs and distilleries in the world. The project is promoting sailing in all of the areas along the route. The coastlines it follows, are the shores of ancient lands and civilisations where the present-day voyager can enjoy a wide range of different experiences. Importantly, in today's turbulent socio-political environment, the Cool Route offers a very high degree of personal and vessel security.

The Rich History of the Cool Route-Vikings, Saints and Pirates

The recorded history of people travelling the Cool Route dates back at least to AD 795 when the first Vikings raided settlements on Ireland's east coast. Growing in confidence by AD 807, the Vikings had extended their reach around the Northern Irish coastline, progressively plundering and pillaging along western Scotland and the west coast of Ireland.



Fig. 1 Vikings and Monks

The route taken by these early voyagers, is believed to have been via Shetland to the Orkneys and down the western coast of Scotland- following the Cool Route all of the way to the south coast of Ireland. A recorded Viking raid, around the year 796AD, on Skellig Michael, threatened what was then the European centre of Christianity. Such raids on coastal settlements continued for a period of two hundred years.

Notwithstanding claims that St Brendan accompanied by a crew of Irish Monks sailed as far as the Americas in the 5th century, it is accepted that people, possibly including

Monks from Ireland inhabited Iceland and possibly lived there up to the arrival of the Norsemen in c.AD870.

Highlighting the history of voyaging on the route, over 1450 years ago, Saint Columcille (Columba), in AD 563, at the age of 42, sailed from the west of Ireland to the Scottish Island of Iona, to establish a monastery which would become a major centre of Christianity.

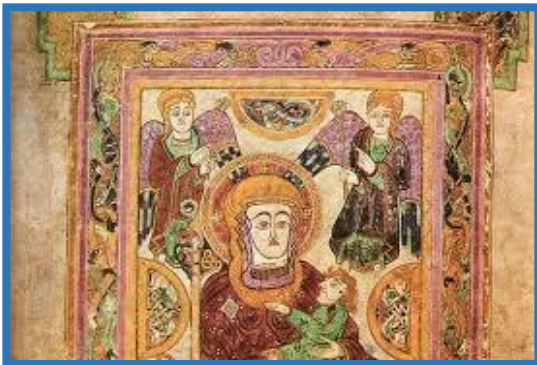


Fig. 2 The Book of Kells

The Book of Kells, a famous illuminated manuscript, is believed to have been produced by the monks of Iona in the years leading up to AD800. The Chronicle of Ireland was also produced at Iona until about AD740. In 806AD, Vikings massacred 68 monks in Martyrs' Bay, and Columba's monks returned to Ireland, to a monastery at Kells. Other

monks from Iona fled to the Continent, and established monasteries in Belgium, France, and Switzerland.

The remains of many of these ancient monasteries can still be visited along the Cool Route in Ireland and Scotland.

By the Middle Ages, the Cool Route was the principal highway for the movement of people and goods around the north-western periphery of Europe. Towns such as Timoleague, in West Cork and Galway in the west of Ireland, were regularly shipping cargoes of wood and hides and importing fine French and Spanish wines.

The Spanish Armada was a fleet of 130 ships that sailed from A Coruña in August 1588 under the command of the Duke of Medina Sidonia with the purpose of escorting an army from Flanders to invade England. It met with armed resistance in the English Channel and attempted to return home through the North Atlantic, when it was driven from its course by violent storms, toward the west coast of Ireland. Up to



Fig 3. Route of the Armada

24 ships of the Armada were wrecked on the Cool Route coastlines of Ireland, spanning 500 km, from Antrim in the north, to Kerry in the south of Ireland, and the threat to Crown authority was readily defeated. Many of the survivors of the multiple wrecks were put to death, and the remainder fled across the sea to Scotland. It is estimated that 5,000 members of the fleet perished in Ireland.

Gráinne Mhaol-Grace O'Malley (1530 – c. 1603) Also known as the Pirate Queen was a famous Chieftain of the Ó Máille Clan in the west of Ireland and headquartered at Inish Boffin-(Boffin Island).

She attacked ships throughout the Irish section of the Cool Route. During a meeting with Queen Elizabeth 1 of England, Grace reputedly refused to courtesy, on the basis that she did not recognise the Queen's authority in Ireland. Gráinne Mhaol fortress still overlooks the moorings on Inish Bofin.

Recreational Sailing began on the Cool Route

The history of Cool Route partner The Royal Cork Yacht Club notes that: *"Sometime in the early 1600s, the idea of sailing for private pleasure started to take root in the Netherlands. Later that century, during the Cromwellian years, King Charles II of England was in exile in the Netherlands and while there he became aware of this new and exciting pastime. In 1660, after his restoration to the English Crown and return from exile, Charles was presented with a yacht called 'Mary' by the Dutch, which he sailed enthusiastically on the Thames. Soon several of his courtiers followed his exampleand private sailing started to become popular in Cork Harbour ...and by 1720, interest in the sport had progressed so much that his great-grandson, the 26-year-old William O'Brien, the 9th Lord Inchiquin, and five of his friends got together to formalise their activities and in so doing established **The Water Club of the Harbour of Cork**. This club is known today as the Royal Cork Yacht Club and it is the oldest yacht club in the world."*



Fig.4 Early yachting at Cork

Today, almost 300 years after the founding of the RCYC, welcoming yacht clubs are to be found throughout the Cool Route.

The route not unlike the *Camino de Santiago de Compostela*, while covering a long distance, is also a route of many parts and just like the famous Spanish pilgrimage route, one can travel different parts of the Cool Route, or indeed repeat the same part several times to maximise the satisfaction of cruising in beautiful and unspoilt locations, which are rich in history, culture, foods, scenery, wildlife and different things to do and see.



Marine Strategies in Partner Regions

Marine Strategies in Partner Regions

The European Marine Directive¹ aims to achieve Good Environmental Status (GES) of the EU's marine waters by 2020 and to protect the resource base upon which marine-related economic and social activities depend. Each Member State is required to develop a strategy for its marine waters. In addition, because the Directive follows an adaptive management approach, the Marine Strategies must be kept up-to-date and reviewed every 6 years.

In September 2013, DG Mare of the European Commission published a “Study in support of policy measures for maritime and coastal tourism at EU level”.² From the perspective of the Cool Route project, the study provides a useful definition of Maritime Tourism:

“Maritime tourism covers tourism that is largely water-based rather than land-based (e.g. boating, yachting, cruising, nautical sports), but includes the operation of landside facilities, manufacturing of equipment, and services necessary for this segment of tourism.”

The report sets the stage for interregional and transnational projects such as the Cool Route- noting that:³

“Maritime and coastal tourism also faces large sustainability challenges. Many coastal areas are pristine and fragile, and the last few decades have demonstrated that tourism activities and in particular mass tourism can threaten local ecosystems, as well as the overall attractiveness of such areas. The future success of maritime and coastal tourism depends therefore on the ability to develop sustainable and integrated value propositions that take account of its environmental impacts. It should therefore look at challenges and opportunities in coastal tourism, yachting and marinas and cruise tourism together – while recognising the specificity of each of these activities.”

The report discusses the threats from mass tourism and favouring local and regional initiatives aimed at non-mass markets sets out a strategic need to:

“Better collect, analyse and spread existing good practices in more sustainable business models in maritime and coastal tourism, when it comes to greater inclusion and benefit for local communities, empowerment of workers and continuing innovation, as well as of preservation local natural resources and the environment.”

The report provides information on employees by Member State engaged in the coastal tourism sector as a percentage of the overall tourist sectors, highlighting the data deficit in terms of more accurate and usable statistics at a NUTS 3 level. It is of interest that in the Cool Route latitudes, there is a very significant level of coastal tourism.

In general, the UK historically appears to be the most attuned of the Cool Route countries to the potential economy benefits of Yachting/Boating activities. The British Marine Federation, which is an associate partner in the Cool Route project, in 2007 published a report⁴ on The Economic Benefits of Coastal Marinas in the UK and Channel Islands. While noting that the sector was then worth an estimated £2.8 billion, the report also calculated that every job in a coastal marina supports 12 jobs in the local economy.

All of the partner countries along the route clearly recognise the potential contribution of marine leisure to their economies. This is very important in terms of the project being favourably placed to influence policies in these Member States.

Republic of Ireland

Harnessing Our Ocean Wealth - An Integrated Marine Plan⁵ for Ireland sets out the Government's Vision, High-Level Goals, and Key 'Enabling' Actions to put in place the appropriate policy, governance and business climate to enable our marine potential to be realised. – The Plan projects by 2020 an annual turnover of €1.5 billion from Marine and Coastal Tourism and Leisure (including Cruise Tourism).

The Plans recommendations include:

- Carrying out national, regional and local initiatives aimed at tapping into the potential of new and existing coastal infrastructure to develop sustainable products, services and jobs. This would encourage investment along the coast.
- Mapping existing marine and coastal infrastructure and amenities throughout the country to support the development of marine and coastal tourism and leisure products and services;
- Research into best practice regarding the development and funding of marina and berthing facilities in Ireland and abroad, with a view to shaping national policy in this area. Fáilte Ireland and the Department of Tourism Transport and Sport are tasked with addressing this objective.

In the case of Ireland and the south and west coasts, the Cool Route is almost identical to the Wild Atlantic Way⁶. While the Wild Atlantic way terminates, or begins at Kinsale in County Cork, the Cool Route extends eastwards by another 30 or so miles to the Port of Youghal in East Cork, including Crosshaven which is the national capital of sailing in Ireland.

The Wild Atlantic Way exclusively addresses the tourism potential of the southern and western Irish seaboard, but from a distinct land based perspective. The Cool Route project will engage with Fáilte Ireland the Irish Department of Tourism Transport and Sport in light of the expressed objectives of the National Marine Strategy relating to yachting facilities and marine tourism.

Northern Ireland

The Northern Ireland Marine Strategy is currently in preparation. In its absence, there are a number of national and local bodies that are committed to promoting Marine Tourism and sailing in Northern Ireland. In terms of sailing, Cool Route Associate partner, The Royal Yachting Association Northern Ireland (RYANI) which is the national body for sailing in Northern Ireland, sets out the objectives in its Strategic Plan 2013 – 2017.⁷

The Department of Culture, Arts and Leisure (DCAL) has also stated its commitment to marine tourism and in particular targets the use of the waterways in Northern Ireland and states its commitment to collaborating on cultural and arts festivals to support an events strategy; investment in upgrading museums; proactive involvement in increasing leisure use of waterways.

Support for initiatives to improve cross border angling. Tourism NI has produced “A practical Guide to Experiential Tourism in Northern Ireland - Coasts and Lakes” which identifies Marine Tourism as a key growth area for the future, where visitors can engage in all kinds of water based activities from fishing and cruising to surfing and kayaking.

In the North West of Northern Ireland, The Loughs Agency seeks to proactively grow the marine tourism sector on a cross border basis across the Foyle in Northern Ireland and Carlingford areas in the Republic of Ireland, and sets out in its Status Report and Action Plan 2014-16⁸. Its aim to foster marine tourism themed events to promote areas and to bolster marine tourism capacity.

Scotland

The Cool Route associate partner, Sail Scotland delivers a range of strategic marketing activities, aimed at bringing more sailing visitors to Scottish waters, in order to grow the sector and deliver benefits to member's businesses and the wider economy. This directly supports the delivery of Scotland's National Tourism Strategy 2020 and Scotland's National Marine Tourism Strategy.

The Scottish National Tourism Body, Visit Scotland, is committed to developing and encouraging sustainable tourism practices by supporting the creation of Scottish marine regions as an aid to the responsible and sustainable management of Scotland's marine resources. Among other stakeholders involved in the development of a common strategy for Scotland, there are: -The Crown Estate (Cool Route associate partner), Scottish Tourism Alliance, Scottish Enterprise, Scottish Development International, Scottish Canals, Highlands & Islands Enterprise and the Firth of Clyde Forum.

Scotland has already placed a very strong emphasis on the potential of marine based tourism and the Scottish National Marine Plan⁹ published in March 2015, seeks to *"Position Scotland as a world class sustainable coastal and marine tourism and recreation destination through the sustainable development of coastal and marine recreation activities and industries in Scotland."*

The plan, at Chapter 12¹⁰ sets out the high level objective of positioning Scotland as a world class sustainable coastal and marine tourism and recreation destination, through the sustainable development of coastal and marine recreation activities and industries. Scotland's scenic sailing waters attract visitors from all over the world with the west coast of Scotland widely acknowledged to have some of Europe's best sailing. Sailing tourism plays a role in contributing to Scotland's economy and can generate income for remote rural areas. Industry projections for the future indicate that development required to meet demands should take place on:

- **The Clyde and the West Coast** – the main focus of development with an emphasis on the creation of strategic berthing hubs/clusters to provide for visitor markets and benefit rural areas.

- **The North** – more modest levels of development needed with an emphasis on the creation of a string of visitor hubs to encourage sailing itineraries and attract visiting boats from both Scotland and elsewhere.

- **The East Coast** – whilst developments will be primarily influenced by the local Scottish domestic market, recent developments mean that it is now as well served as any part of the Scottish coastline with the development of new marinas and improvements to existing harbours. Continued development and provision of facilities in these areas could help to further attract visitors sailing up from north east of England and across the North Sea.

The National Plan, among other strategic documents references *“Awakening the Giant: A Strategic Framework for Scotland’s Marine Tourism Sector”*¹¹ which sets out that *“by 2020 we want Scotland to be “A marine tourism destination of first choice for high quality, value for money and memorable customer experience delivered by skilled and passionate people”* It also notes that “Marine Tourism is one of Scottish tourism’s sleeping giants with sailing and boating alone already generating over £101m of visitor expenditure and directly supporting the employment of almost 2,730 jobs. Cool Route associate partner British Marine, in its recent 2014 study into the economic value of marine tourism, indicated the sector in Scotland is valued at £360 m. noting that *“With coordination and effort at every level we can build our sector into the giant it can be.”*

From a tourism revenue perspective, the Scottish Government has quantified the value of the sailing tourism within the overall recreational marine sector to its economy and sets out a clear Mission Statement as follows:

To develop and lead the growth of sailing tourism in Scotland from £101m of visitor expenditure to £145m by 2020, and to increase the overall economic value of the marine tourism sector from £360m to over £450m by 2020

The most recent strategy document published on sailing in Scotland is the “Sailing Tourism in Scotland”.¹² Report for The Crown Estate, Highlands and Islands Enterprise and Scottish Canals, dated December 2016. The report notes that the current value of the market is £130 million, with a £39m output from non-Scottish residents, and suggests that with development of the market this could increase, depending on different scenarios to as much as £167.1m.

The Faroe Islands

The Faroe Islands does not have a marine recreational strategy, but resulting from its participation in the Cool Route project, The Torshavn Port Authority is actively pursuing the development of a strategy to maximise yachting visits to the Islands. It is worth mentioning that one of the actions taken was a briefing on the Irish strategy *Harnessing Our Ocean Wealth*, which has been presented to the National Faroese Tourism Organisation.

Norway

Norway does not have a marine recreational strategy. Tourism is mentioned as a “related sector” in the government’s maritime strategy “Støkurs 2020” (Steady course 2020). In the tourism strategy for all parts of tourism, “Destinasjon Norge” from 2012, especially cruise tourism is given mention. The strategy is to increase revenue from the cruise tourists who are already visiting. In Spitzbergen, the strategy is to shift from reliance on mining to tourism and maritime industries (shipping etc.). Tourism in coastal areas is also given good attention, especially through the destination company Fjord Norway and NCE Fjord Norway.



Cool Route Market Research and Stakeholder Consultations

Cool Route Market Research and Stakeholder

Consultations

Market research is an important aspect of the route development and inputs from stakeholders are key to this aspect of the route development.

There are a varied range of stakeholders of importance to the route. These include a Provider Group and a User Group:

Provider group

- marinas, pontoons, and moorings
- boatyards
- providers of electrical and mechanical services
- local tourism operators
- activity pursuit providers
- restaurants, cafes, shops and pubs

User group

- the international cruising community
- potential holiday-makers who might consider chartering vessels
- superyacht owners and guests
- passengers on small liners

Project activities include meetings with all local authorities on the route, as well as with other key stakeholders, with a view to briefing them on the objectives of the project and securing their ongoing commitment to assisting the project to realise its goals



Studies and Research Results

Studies and Research Results

In developing its marketing strategy, the project undertook a considerable level of primary research:

- An initial **Cool Route SWOT Analysis** to better understand the opportunities and challenges of successfully marketing the route.
- A **Cruising Preferences Study** to establish the preferences and priorities of the cruising sector.
- A **Route Traffic Study** to identify the main market locations and potential market size.
- A **Route Logistical Study and Gap Analysis.**
- A **Superyacht Focus Study** to build engagements with the sector and to research the potential of developing increased superyacht traffic on the Cool Route.

All of the foregoing studies were undertaken as integral components of developing the Route Marketing Strategy, with the collaboration of all partners, on a transnational basis.

The Cool Route SWOT Analysis

A SWOT analysis of the Cool Route, based on inputs and expertise of all partners¹³ shows the following results.

Strengths of the Cool Route

- Strong Cool Route partnership with complementary skills sets and wide area sectoral connections.
- Associate partners are the key national players in terms of sailing development.
- High levels of individual partner connectivity into key source markets.
- Strong support and buy into the cruising sector by National Tourism Bodies in Northern Ireland, Scotland and Norway.
- Highly attractive cruising locations, in terms of scenery, history, culture and heritage.

- Uncrowded cruising grounds- with highly developed general tourism infrastructures.
- Existence of many yacht charter services, with potential for growth in this sector.
- Excellent levels of Search and Rescue Services.
- High levels of personal security, within a global marine environment where personal and vessel security is a growing issue and concern.
- Excellent general range of marine tourism facilities in terms of marinas, pontoons, boatyards and general shore-side facilities.
- A very comprehensive range of things to do and see in highly touristic locations.
- Good air connectivity for crew changes.
- Widespread capital investment in new marina and pontoon facilities is evident.
- A good level of public/private sector interest in each of the cruising areas, to address gaps where identified. These gaps may be in terms of distance or on shore toilet and other facilities.

Weaknesses of the Cool Route

- Variable weather conditions, especially outside of the core cruising season May to September.
- Significant gaps in terms of distance and facilities along the Western coastline of Ireland.
- Varying levels of support for the sailing sector from national tourism bodies.
- In some cases, sea crossing is involved – noting that to sail the Cool Route, one may choose to sail any section, without the need for a sea crossing.
- Lack of coordinated sailing marketing historically in the Northern Periphery and Arctic Area.
- Competition from more established sailing areas, such as the Caribbean, Mediterranean and Adriatic Seas.

Opportunities for the Cool Route

- The potential for all partner areas to collaborate in marketing the overall route, particularly into key source markets.
- Promoting the internal market by encouraging and incentivising more sailing trips by vessels already based within the route.
- Promoting higher usage of locally chartered vessels to explore the different route segments.
- Canvassing new business, based on the high levels of security to be enjoyed on the route, compared to other locations.
- Undertaking collaborative marketing campaigns within shared target markets.
- Directly promoting the Cool Route to the superyacht and small liner sectors.
- Engaging with a wide variety of coastal enterprise in marine and ancillary services to make sailing their areas more attractive and enjoyable.
- Realising the route as a world class cruising, racing, sailing location which can attract international support for its quality offerings.

Threats facing the Cool Route

- An important threat is that once the current project is completed that the impetus could be lost.
- More intensive marketing by sailing areas in the Mediterranean, Adriatic and Caribbean.
- Brexit-Potentially leading to new border controls and barriers to free movement between The UK and other Cool Route territories.

The Cool Route Cruising Preferences Study

Between October 2015 and March 2016, the project conducted a very reaching Cruising Preferences Study. It covered the entire partnership Member States. With over 500 valid responses, it is the most comprehensive research ever undertaken into sailing preferences of the cruising community in Northern Europe.

Questions addressed a wide range of topics ranging from the size and types of vessels, daily spending patterns, sailors' priorities in terms of distances between stopovers, most needed facilities ashore and thing of most interest to do and see.

There was a very highly qualitative basis to the study and its report catalogues a great many comments and suggestions from sailing stakeholders. The survey highlighted the potential of the Cool route to achieve highly sustainable growth in the numbers of visiting vessels.

The following Word Cloud was generated using the qualitative survey answers.



Fig. 5 Word-Cloud of recurring words from Cruising Preferences Study

The results of the study, published separately at <http://www.sailcoolroute.eu/cool-route-launches-survey-report-cruising-preferences/> highlight a very strong level of interest by cruising sailors in the Cool Route and the further development of its cruising grounds. These inputs are very important from a route marketing perspective both from sailing and shore side perspectives.

The survey shows that sailors within the Cool Route and beyond would be interested in cruising farther afield if they had the assurance of safe havens, at reasonable intervals of 25nm throughout the route.

The survey also identifies a number of potential deficiencies and related opportunities in terms of the provision of waste disposal facilities, the improvement of local chandlery supplies and the potential to develop charter or similar means for people to explore areas of the Cool Route. It also raises the question as to what additional facilities may be required to attract a much greater number of mega or super yachts to the Cool Route

The survey findings, which are reflected in the thematic marketing recommendations in a later chapter, form an important set of inputs to the development of this Marketing Plan, in terms of not alone marketing the route itself, but as a very useful source of information to small enterprises along the route, engaged in the marine sector and also in a wide range of non-marine businesses, who can benefit from the development of cruising along the various sections of the route.

“Taking the time to slow down and be close to nature, being in tune with the wind and the waves. Watching the seabirds swoop and the dolphins and whales at play. Enjoying the exhilarating sail and the spray and the boat slicing through the water. Arriving from the sea is always better than from the land. A feeling of achievement after every safe passage. The islands, the navigation, catching dinner, the sunsets, the sunrises, the shooting stars and the moon! And of course, a pint of the black stuff at the end of it all.”

“The grounds covered by the cool route project are some of the most interesting cruising areas in the world. Anything which promotes this and makes life easier for the leisure boater can only be a good thing.”

Fig.6 Sample Quotes from the Cruising Preferences Study

The Cool Route Traffic Study

There is a distinct lack of any research or data on the numbers of cruising yachts operating in Northern European waters. While there are statistics on overall leisure vessel numbers, these are usually not broken down to a degree, where classification of vessel types is possible.

The project had to conduct its own research through a traffic study, which was undertaken through one to one interviews, historical AIS data and literature reviews

Table 1, developed in the Route Traffic Study¹⁴ shows the locations and estimated numbers of route based cruising vessels – with Western Norway having by far the highest number of craft- the majority of which are motor propelled, but are frequently used for coastal trips involving overnight stays at different ports.

Locations and numbers of cruising craft based on the route	
Coastal Area	Estimated Number of cruising Craft Based
Ireland South and West Coasts	1,250
Northern Ireland	1,933
Western Scotland	5,829
Faroe Islands	20
Western Norway	8,862
Total	17,894 (18,000)

Table 1 Locations and number of cruising vessels based on the Cool Route

From a cruising perspective, the study indicated that c 2,800 visits are made annually to the Cool Route, by externally based vessels. This represents less than 2% of the overall market potential, in terms of vessel numbers. Route based vessels appear to record less than one vessel trip per annum.

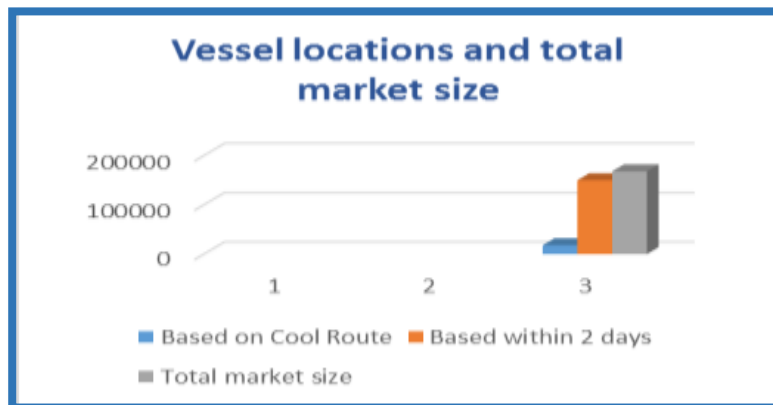


Fig. 7 Vessel locations and total market size

The estimated level of total overnight stopovers on the route in 2015 was c.75,000. This, based on the spending findings of the Route Cruising Preferences Study, represents a direct local spend of the order of €9.4 million with SMEs and Micro Enterprises. Added to this is the average annual standing cost for each of the 18,000 route based cruising vessels, which is estimated at €6,800. This sum covers annual mooring or marinas fees, maintenance and repairs, insurances and winter storage and launching fees. This confers an immediate Cool Route economic benefit, to local enterprises, before any movements of vessels, of c. €122 million per annum. Indicating a total value of €131.4 million.

Additionally, the Traffic study identified the main source markets for each of the route segments and where marketing should be focused.

External Traffic Source Markets

From a Cool Route external source market perspective, Cool Route locations in Southern Ireland, Northern Ireland and Scotland all benefit primarily from visiting yachts from Eastern Ireland, South of England, Wales and to a lesser extend from other ports in Northern Europe, the USA, Canada and the Caribbean. Norway is a significant beneficiary of yachts sailing from Sweden, Poland, The Netherlands and Germany, together with a small number of Russian vessels.

The Faroe Islands, annually receives between 50 and 100 visiting vessels from Southern Ireland, Northern Ireland, Scotland, Norway and England. The location is not primarily seen as a final destination, but as a one or two night layover for vessels going to or coming from Iceland.

In total, the route welcomes an estimated 2,880 external visiting vessels. Of these,

approximately 1,000 visit Norway, 480 visit the coasts of Ireland, 400 to Northern Ireland and 1,000 to Scotland.

From a direct economic benefit perspective, with an average crew of 3.3 persons and the average daily spend of c. €130.00, visiting yachts can considerably contribute to the turnovers of local enterprises on the Cool Route. They additionally bring business in terms of flight bookings for crew changes and may also contract Winter layover facilities.

The route's most important external source markets are the Western and Southern coasts of England, Wales, Northern and Western France, Netherlands, Belgium, Germany and Poland.

An important focus of the Cool Route Marketing, Business and Commercialisation Plans will be on accurately quantifying and increasing the maximising this potential market share.

Internal Traffic Source Markets

Cool Route permanently located vessels represent a very sizeable potential for the market development of the route. Within the Route there are a number of distinct reciprocal markets and none is stronger than the bi-directional routes between Donegal in North West Ireland, Northern Ireland and Western Scotland. The Route Gap Analysis has examined these waters and coasts in terms of the supply of overnight stopovers and generally it is well catered for in terms of facilities. Other links are bi-directionally between Norway and Scotland with the Faroe Islands, which are the most considerable open sea crossings in the overall route.

From Cool Route research on cruising preferences, including duration of cruises, it is clear that many yachts capable for cruising, are only used for local day sailing and are seldom, if ever used for cruising. The Cool Route Cruising Preferences Study suggests that the potential of local route based yachts undertaking longer or more frequent voyages can be developed. This potential is roughly comparable to the potential market for and economic benefits of additional visits by external yachts. Within the route, locally based yachts have a strong potential to generate substantial growth.

The Project Logistical Study and Gap Analysis

The Glasgow Caledonian University's Moffat Centre for Travel and Business Tourism Development, has lead responsibility in the project for researching Route Logistics and Gap Analysis. The project examines all of the logistical aspects of the route from a cruising perspective, identifying and engaging with existing facilities and making recommendations on the basis of a gap analysis for the development of new facilities.

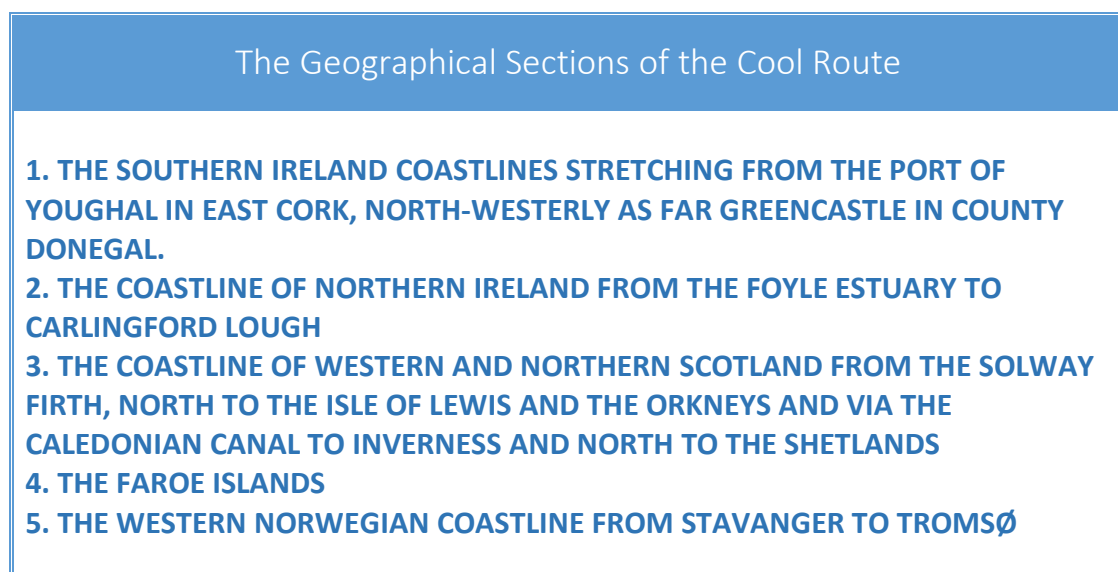


Fig. 8 geographic segments of the Cool Route

The project strategy is to have a safe harbour or layover facility, be that a marina, pontoon or serviced mooring, with a dry step ashore, approximately every 25 nautical miles-translating into a four-hour trip for the average cruising yacht. All such stopover points should have washroom facilities. In addressing this goal, figure 7 sets out the geographic segments of the route.

Project research has shown that in general, there are few distance gaps to be addressed in terms of 25 nautical mile stopovers- the exception being the West Coast of Ireland- where a voyage would normally go via Dingle to the Arran islands and then directly to Killybegs. Northern Ireland and Western Scotland are adequately equipped with marina and pontoon facilities. The Faroe Islands has good facilities and western Norway is highly developed for movements by sea.

The Gap Analysis does identify a number of facility gaps throughout the route, mainly of shower facilities and these will be addressed as the route business planning, commercialisation and realisation work continues.

The Superyacht Study

An international literature review demonstrates that many different territories are focusing in on the growing value of sailing to local economies and that for every job provided directly in the sailing sector, approximately ten to twelve other jobs are supported in local industries and services.

A concept has been identified in the international literature that one superyacht is the equivalent of a very successful and active local SME – providing employment and making considerable contributions to overall levels of local expenditure and hence GDP growth.

While the Cool Route is not primarily focused on developing superyacht business, there is an enormous amount of “low hanging fruit” within the sector, as these vessels are fast, mainly independent of weather



Fig. 9 Superyachts are becoming evident on the route

conditions and are very high spending. A superyacht costs about €800,000.00 a week to hire and its weekly and weekly expenditures can exceed €250,000.00.

These vessels are actively seeking new cruising grounds and a high premium is placed on things to do and see- new cultural and heritage experiences, high quality foods and interesting onshore activities. A benefit of this approach is that visits by superyachts to the Cool Route, will also facilitate and attract more regular cruising yachts to the route. Many superyachts, as with small liners will opt to anchor offshore and ferry clients to land. Small local pontoons are very sufficient to accommodate these landings and will also facilitate the visits of ordinary yachts to these locations.

The potential of attracting superyachts and small “garden” liners to the Cool Route has been discussed by partners. Given the decreasing security of more traditional superyacht sailing grounds and coupled with the extensive and varied range of things to do and see on the Cool Route, the partners believe that if the route is properly packaged that more of these vessels will come.

At the project steering committee meeting held in Glasgow in April 2016, it arose through discussion that there was a perceptible increase in the numbers of superyachts visiting the Cool Route during 2015. This trend was even more evident in 2016 and most notable on the coasts of County Cork and in South Western Scotland, where project Partners, the Royal Cork Yacht Club, based at Crosshaven in Cork Harbour and Blue Seas Marinas, based on the River Clyde at Glasgow had noted some significant growth.

Additionally, a number of large superyachts were not just making quick visits, but were spending extended periods of a number of weeks in these areas. Some of these vessels were equipped with helicopters and guests were seen to be flown off the ships to visit different areas of the route and to participate in local activities.

The project agreed in April 2016 that the superyacht sector represented a significant opportunity for promoting new business opportunities for enterprises on the Cool Route.

There are more superyacht on the order books of shipbuilders' yards than ever before. The vessels are valued at a cost of €1 million per foot to build. An "ordinary" superyacht can easily be valued at over €100 million. In many cases these vessels are chartered to guests, who can pay about €800,000.00 per week for the privilege of staying aboard. A fill for fuel for one of these vessels can cost €250,000.00 or more and in general they command a very high spending power.

Partners also believe that the Cool Route is emerging as a route of choice given the political situation in many of the more traditional superyacht Cruising Areas.

Additionally, a number of small liners, with up to 100 passengers, have also begun to cruise areas of the Cool Route. Local enquires with areas which have received such visits is that the passengers are looking for a range of different authentic experiences and meeting people in their own environments. In general facilities and selling points for superyachts, will also attract small liners.

One of the major benefits of these generally larger craft, is that they have the potential to very quickly underpin the economic viability of installing small landing pontoons, essentially to berth small tenders taking passengers ashore.

This aspect of the route, which has significant potential, was the subject of a short

additional study. The methodology employed was a mixture of direct interviews and an online questionnaire issued to focus group of personnel, who are either currently working as skippers of superyachts or had previously been engaged in the sector.

From the discussions conducted a number of headline findings can be identified:

- Owners and guests on super-yachts are highly a discerning group of people, who want only the highest quality of experiences and services.
- Any approach to the sector has to similarly be totally professional and comprehensive in terms of marketing materials and information being supplied.
- Skippers of these vessels are often highly influential in terms of selecting voyages and destinations.

Based on the growth over the past year in superyacht visits, coupled with the inputs received from the focus group, it is strongly suggested that the Cool Route has further development potential in this sector.

From a facilities perspective, there may be existing constraints, but none appear to be critical or “deal breakers” in terms of beginning to market the route. As one Skipper stated in a personal interview “superyachts will come, but you will have to put in on a plate for them”.

It is clear that where marinas are capable of taking superyachts alongside- that 3 phase electricity would be a good selling point, as it obviates the need to keep generators running.

Otherwise, it would appear that the routes natural assets are enough to successfully market it. If vessel numbers and demand was to increase, then investments would be entered into because of the market demand.

The main conclusion of the short superyacht study is that the Cool Route should commission a high class marketing brochure setting out the route in terms of its natural and other attractions and where possible highlighting the locations that have some of the facilities commented upon in the survey. These would include Marinas capable of berthing a superyacht, good anchorages, perhaps within a reasonable distance of local airports, local attractions such as restaurants, activities or other historical or cultural attractions.

To quote another of the respondents- which very adequately summarizes the outcomes from the focus group “Just market what you have and go for it, it is beautiful country and super-yachts are always looking for new places to go.”

Small Liners

The same logic can be applied to the potential of the route to attract small or garden liners. These vessels would usually carry perhaps 100-150 passengers and crew, with a highly experiential emphasis on the cruise. Very different from the mass tourism activity represented by large liners, these smaller ships, similar to superyachts are very happy to find secure anchorages in proximity to coastal areas of interest. The M.V Bremen plied the Irish waters of the Cool Route in 2016 and guests experienced activities such as turf cutting, brown bread making and pint pulling, attractions highly enjoyed by participants.

As with superyachts, these small liners have ample facilities to ferry passengers ashore and the main facility required is a landing pontoon and waste disposal /recycling facility, such as a convenient skip.

The project has launched a high-quality superyacht and small liner marketing shell brochure, with inserts covering different segments of the Cool Route. The marketing objective is to provide details of facilities and things to do and see.

The Cool Route Business Plan

The Route Business Plan will not be completed until mid-2017 and will undertake more detailed economic analysis in terms of the impacts of the overall sailing and boating sectors to local economies. Cruising only represents a part of the overall leisure craft fleet.

The key function of the Business Plan will be the engagement with local enterprises throughout the route – to assist these operators to secure more sea borne business opportunities. As earlier noted, the route is presently contributing c. €131 million to local enterprises- ranging from those directly involved in marine series and also ancillary tourism type enterprises. With a statistic of every marina job supporting 12 jobs in the local economy, the local economic multiplier effects of the sector are also considerable.

The project's objective is to bring business to local enterprises covering a wide range of different sectors - ranging from marine to general services along route. These businesses include marinas, mechanical and repair services, restaurants, cafes, pubs and shops as well as activity pursuits and a wide range of visitor attractions. Irrespective of its port of origin, any vessel plying any part of the route will bring new business to these enterprises.

Opportunities also exist for the establishment of new businesses and for existing enterprises to extend the range of services offered. These new services may be the establishment of new facilities such as chartering operations, new marinas, pontoons or moorings; new services such as waste disposal, cafes or activities and things to do and see. A local restaurant might see the commercial benefit of offering a ferry service to diners on moored yachts, or a local shop or supermarket might offer to deliver the grocery purchases to dockside at the local marina. Similarly, a local boatyard might consider offering a competitive wintering lay up to cruising yachts, a local taxi may provide a crew pick up service at a local airport, or a laundry might advertise its services in a local port.

In the two years since the commencement of the Cool Route project, approx. 30 new Marina and pontoon facilities have been developed by public and private sector investors, at different ports along the route.

The Route Information and Booking System

The Route Information and Booking System, currently in development, will provide a link between locations, enterprises and clients. This work will be closely connected to the Business Planning activities of the project. It will importantly also provide an important marketing mechanism – allowing small enterprises to directly market their goods and services- be that a boatyard or a local museum to a wide range of cruising sailors.



Marketing

The Cool Route

Marketing The Cool Route

Cool Route Mission Statement

The Mission statement for the Cool Route project is: **To market and promote the participant areas as world class cruising grounds and through increasing the numbers of vessels bringing tourists to the shore of the route, to deliver enhanced business opportunities for local enterprises.**

The project represents the first programme of transnational cooperative Marine Tourism Marketing across multiple national boundaries, in the North West Atlantic Area. In addressing this mission, the project is fortunate to have a very strong wide-area based consortium, which includes all of the major National Sailing Organisations in the UK and Ireland. These organisations are highly influential and already undertake international marketing activities on a unilateral basis.

The marketing objective is to successfully market the entire Cool Route as a world class international cruising grounds, with individual segments of the route continuing to compete for their shares of the increased overall business.

Based on project research, the main geographic source of business for the route are:

- Vessels already based within the Cool Route.
- Vessels based in areas contiguous to the route.
- Superyachts/small liners which can be based anywhere in the world.

Addressing business and traffic development in these sector is considered in the following paragraphs.

Promoting local voyages Vessels based within the route

Thousands of cruising vessels are already based within the route, which if encouraged and facilitated to cruise areas of the route, can bring substantial new business opportunities to Cool Route enterprises. Initiatives with Boating and Sailing Clubs, Local Harbours, Community Development Organisations and Local Chambers have potential to readily increase the number of local vessels traveling areas of the Cool Route.

There is a discernible passive approach to attracting sailors to small ports. Generally, a stopover facility is provided and the attraction of users is mainly left to chance. “They will come – because we are here “

In reality, to attract more significant numbers of visitors, initiatives are needed to be taken by stopover locations to promote sailing visitors. Organised outings, such as 'Sailing in company events' are one means of how such areas can attract enhanced visits. As an example, a small port/village located 20nm (4 hours) from a large source port might organise a weekend of events – such as a Saturday afternoon walking tour, followed by a dinner or barbecue, with music and followed by a Sunday morning local market and visit to a historical or cultural attraction. Sailors would be prepared to pay a competitive price for the barbecue and tour and the local market could carry a range of locally produced goods. Twenty yachts would bring in up to 100 visitors for the weekend, not all locations can cater for 20 vessels but many can. Similarly, longer cruises could be “packaged” for from one or two vessels to significant numbers-making the trip more achievable for those who may be reticent about making a voyage alone.

Cool Route Partners Donegal County Council and Derry and Strabane District Council, together with associate partners in RYA NI, RYA Scotland and Sail Scotland, have already successfully participated in marketing their Areas for sailing within the Sail West and Malin Waters initiatives – promoting voyages between Northern Ireland and Scotland, as well as voyages from different external areas.

Organisation of periodical events in collaboration between the two regions to trigger mutual motivation to visit both countries. Collaboration between Northern Irish and Scottish sailing clubs or other marine and services operators as well with promotions targeted to sailing segment.

Similarly, frequent voyage are made between Scotland and Norway, with trips to Lerwick in the Shetland Islands are popular for Norwegian sailors.

Vessels based in areas contiguous to the route

The Route Traffic Study identifies the main locations of the c.150,000 cruising vessels located within a two day sail of the route. These represent core external markets for the Cool Route. While partner areas will closely cooperate at a macro level for this business, they will also compete to secure it for their own local areas. The project will importantly establish the Cool Route as a world class cruising area, where people will make their own decisions on which areas they wish to sail.

The main external target markets for Ireland, Northern Ireland and Western Scotland are the South of England, Wales, North Western France and Eastern Ireland.

The Faroe Islands covers the northernmost part of the Cool Route area. Despite its remoteness, it attracts hundreds of visitors each year on sailing yachts, many of them seeking new adventures and experiences off the beaten path. And there is plenty to experience.

The Faroe Islands, is in the main used only as a stop off point for vessels making the long crossing to and from Iceland. Before the Cool Route, the Faroe Islands did not place a great emphasis on the potential of such vessels to the local economy, as their stays were usually very short. The Faroes islands have significant potential in their own right as a cruising destination – marketing the unique location to sailors in Scotland, England, Ireland and Norway.

In a large survey conducted a couple of years ago, what struck foreign visitors most about their visit in the Faroes was as follows.

Scenery – It is remarkable how astonishing it is with its rugged cliffs, green mountain sides and millions of sea birds, seals and whales – something you will truly appreciate when arriving through the fjords. One thing you will notice upon entry is that in many villages, the first sign of civilisation you will see, is the church, as these originally were built to be seen from the sea.

Culture – Despite being a very modern society today, lots of things from the past are still very much present. The language is more or less the same today as it was spoken thousand years ago in Scandinavia and parts of Northern Scotland. Traditions are also cherished, like the opening of the Parliament after the summer break. Islanders remember the Norwegian King who ruled when the island turned Christian around the year 990 AD. Part of the government is still located at the same spot as the original Things (parliamentary meetings) were held. The Faroes has the oldest Parliament in the world.

What it lacks in size, compared to other Capital cities in the world, it more than makes up in charm. Despite its relative small size of approx. 20.000 inhabitants, Torshavn has everything expected from a Western European Capital. Both in terms of education, health care, recreation facilities, or dining options ranging from Burger King to the Michelin star rated restaurant “Koks”. Since the Faroes are so small, almost all of the

other islands are reachable within an hour drive from Torshavn. Add to that, several interesting museums of arts and culture, and the capital, where all the required services for any yachtsman can be found within a short walk is even more attractive.

The main cruising source markets for Norway are Sweden, Germany, Denmark, the Netherlands and Poland.

The extensive facilities in Norway for visiting vessels, together with its magnificent scenery, long summer days, coupled with settled weather and sheltered coastal route make Norway an ideal cruising grounds.

The Cool Route therefore needs to build a two prong marketing strategy for external market opportunities. One strand addressing the Irish, UK and French markets and the second focusing on the North-Eastern Europe market potential for Norwegian waters.

An excellent opportunity exists for cooperative Cool Route marketing at annual Boat Shows in the UK and Northern France. A Cool Route very high impact trade stand at such events could carry macro level materials, promoting the overall attractiveness of the route and its facilities. The stand, if funded by each participating region, could have a significantly greater impact than any one of the participating regions could afford. Jointly produced promotional literature and video materials could be of the highest quality and produced in multi-lingual formats.



Key Selling Points of The Route

Key Selling Points of The Route

Strong common themes to market the Cool Route can be developed in areas such as heritage, history, culture, wildlife, foods. Extensive market research completed under the Project's Cruising Preferences Study, clearly highlight that the main selling points of the Cool Route are as shown in fig 10.

Attractions of the location and things to do and see	
AMAZING SCENERY PERSONAL SECURITY RICH HERITAGE AND CULTURE SOLITUDE HISTORICAL SITES MUSIC QUALITY FOODS INDUSTRIAL HERITAGE ABUNDANCE OF WILDLIFE	PUBS AND RESTAURANTS MUSEUMS AND GALLERIES CRAFT SHOPS AND ARTISANS WALKING WHALE AND DOLPHIN WATCHING PHOTOGRAPHY PAINTING MILITARY HERITAGE

Fig. 10 Attractions and things to do and see

The Route's marketing materials should emphasise these strengths, which make the Cool Route far more interesting and rewarding as a holiday destination than many of the traditional cruising grounds- which are in the main sun based locations, with little else of interest. The involvement of local providers in Cool Route marketing campaigns will be highly important, as the route itself is only a conduit for additional business for these enterprises.

Proactive and Collaborate Marketing by Stakeholders
The marketing strategy emphasises the critical importance of a highly proactive and collaborative marketing drive, not alone at the overall route level, but at every cool route stopover, involving all local enterprises, to attract sea borne business to their locality.

Fig. 11- Collaborative Marketing involving enterprise stakeholders



The Cool Route Marketing Strategy

The Cool Route Marketing Strategy

A significant level of primary research has been undertaken in developing the route marketing strategy. Much of this work represents a first, in terms of studying the sailing /cruising sector transnationally and project findings to date suggest that the Cool Route has significant developmental potential.

Areas of the route such as Western Scotland are actively marketed by national bodies, combined marketing also is undertaken across Northern Ireland under the Sail West initiative which is partnering with Scotland's marine development sector.

Marketing of sailing in Ireland has to date not been a marketing priority of Fáilte Ireland, the Irish national tourism body. Similarly, no specific marketing of sailing is carried out in the Faroe Islands or in Norway.

As the global economy exits recession, the time is opportune to develop and commence a highly proactive campaign to heighten awareness of the attractiveness of the Cool Route as a world class sailing ground, capable of significant market expansion over the next ten years.

The recommended marketing strategy is set out in terms of:

What is the Cool Route marketing?

Who should marketing be directed towards?

Where are the main source markets to be targeted?

How will Cool Route successfully target these markets?

Each of these questions is addressed in the following paragraph, setting out the strategy

What is the Cool Route Marketing?

1. The route is marketing a series of highly scenic cruising grounds, all located at latitudes above 51° North and mile for nautical mile offering its visitors rich and rewarding experiences, to a level difficult to find elsewhere in the world.
2. The cruising grounds of the route are rich in culture, heritage, history, traditional music, high class foods, world famous beverages, amazing wildlife. In general, despite their high latitudes, they are in the main pleasant waters to sail in, with moderate to high summer temperatures.

3. An important marketing aspect of the route relates to the personal security of vessels, skippers and crews. There are no known security issues on the route- thus differentiating it from many traditional cruising areas, where security issues may pose threats to vessel safety.
4. From the Cool Route Cruising Preferences Study and the Route Logistics and Gap Analysis, partners are marketing a route which, with the exception of the western coast of Ireland, offers a dry step ashore facility every 25 nautical miles, with an improving range of shore side facilities.
5. Once berthed at any location on the route, there are many things of interest to experience, do and see- such as local restaurants and pubs, walking, local foods, museums and cultural attractions. This strongly differentiates the Cool Route from areas such as the Caribbean, where weather may be better, but the range of activities ashore is limited.

Who should marketing be primarily directed towards?

The Route Cruising Preferences Study covered all areas of the route, as well as being directed towards sailors in areas located with a two day voyage of some point on the route. With over 500 responses being received, many of which were not from within the route, it is clear that the route represents a highly attractive sailing ground and a very small percentage of its market potential is currently being realised.

The main target demographic for the route is people who are generally 45 years+ and who sail their own yachts or motor vessels. These people, in many cases emphasis the enjoyment of stopovers rather than the actual voyage. An ideal day's trip is about 25 nautical miles or about 4 hours at sea. They enjoy eating out, visiting local galleries and museums, craft shops, walking and pubs and music. Generally, they will be members of yacht clubs or cruising associations and marketing can be directed at them through such channels.

The second group targeted for marketing focus is the superyacht sector. As earlier noted, in 2016, based on a growing number of superyachts visits, the Cool Route project undertook a superyacht study, based on an expert focus group of superyacht skippers, who are internationally based. The study strongly suggests that superyachts are seeking new destinations and that they do not require any special

facilities beyond the requirements of ordinary cruising yachts. They did however stress the importance of access to local waste disposal /recycling facilities

Based on the recommendations of the expert focus group, the project decided to approach the market in time for the 2017 season. The project produced a high quality marketing brochure, for circulation to skippers and owners, introducing them to the Cool Route, as a first class cruising ground of the future.

The third sector, to be targeted for cruising the Cool Route are small liners, carrying c.120 passengers. This 'Garden Liner 'sector made its debut in new areas of the Cool Route in the Summer of 2016, bringing valuable business opportunities to small peripheral communities. As with the superyacht sector, these small liners, do not require any special facilities other than a landing pontoon on which to disembark passengers from ship's tenders, to facilitate visiting local areas.

The superyacht marketing brochure may initially also service this potentially expanding sector. Local communities interested in securing this business will need to package a range of activities to attract the business. Passengers will usually spend c. four hours ashore and the programme ashore may include a local guided walk, participating in some keynote local activity or visits to shops, cafes, galleries museums or visits to local interpretative centres.



Fig. 12 Sectors to be targeted

Where are the main source markets to be targeted?

Project research has shown that the route has both significant internal and external markets. The economic value of visiting vessels from both markets is almost identical. Potential does however exist to attract external vessels to base themselves permanently on the route. The main opportunity would be for southern UK boats to move permanently to the Cool Route, where tidal difficulties are not constraining and fly-sail may reduce overall costs in terms of time and money.

Internal route business potential

The Cool Route Traffic Study undertook a detailed analysis of the primary locations of cruising yachts located both on and adjacent to the route. It found that a very significant number of vessels are located on the route and many of these do not make voyages at a level which provides significant business for Cool Route enterprises. The study also importantly highlighted that the potential value of a yacht crew of four for a local community is the same, whether the yacht voyages just 10 miles, or one hundred miles to reach that location. Therefore, local markets may be considered as 'low hanging fruit' and it is believed that much more can be done to encourage more usage of yachts to make short or somewhat longer trips within the Cool Route.

Up to now, the initiative for cruises in company or local musters is mainly taken by source locations. A local yacht or cruising club might organise an annual sail to a port along the coast.

Cool Route research suggests that such initiatives should be more frequently driven by the destination location and operators, be they local communities, farmer

market organisations marina-pontoon operators or yacht and cruising clubs. Such initiatives would have the benefits of addressing wider yachting groups or individuals, including those who are unaffiliated to a club. Another benefit is that a cruise in

Marketing the Route Internally

Internal marketing of the route will be supported significantly by a cooperative effort by local stakeholders, who will be the beneficiaries of increased visits by marine tourists. Initiatives could include organised cruises in company, with events such as barbecues, tours and walks organised by the receiving locations.

Fig.13 Marketing the Route Internally

company, with perhaps a dozen yachts or motor vessels, travelling together in close proximity, provides a degree of security, safety and confidence to those reticent to undertake coastal passages alone.

Those offering a programme of events, can do so on a regular basis, building a following and generating repeat business. Some of the participants may well select to drive, leaving the voyage element to the more experienced sailors, with family members and friends either staying on the boat or at local B+Bs.

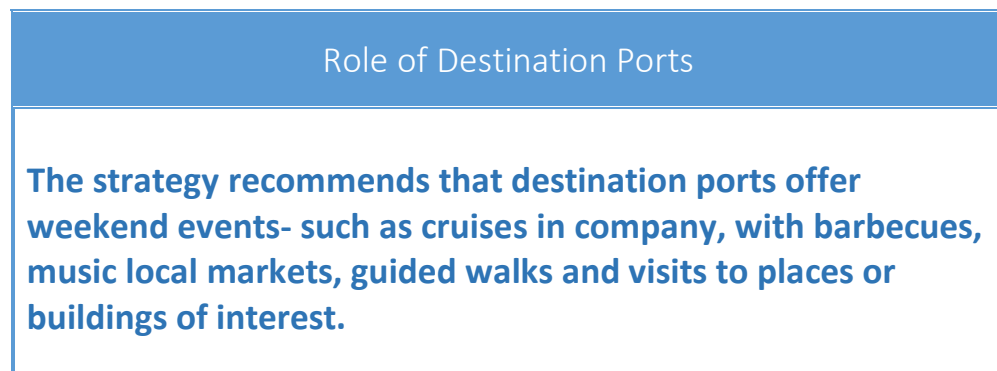


Fig. 14 Role of Destination Ports

External route business potential

These external markets are differentiated by their geographies and the Route Traffic Study Suggests that the main source markets are as follows in table 2:

Table 2 – Route main external markets

Cool Route Destination	Main Source Markets	Comments
South Coast of Ireland	East coast of Ireland, South of England, Wales, North/West France	The south coast of Ireland is within comfortable reach of main UK markets and is well developed with marine and ancillary facilities, including ease of access by air
West Coast of Ireland	South Coast of Ireland, North of Ireland, South of England, France	In terms of distance, the west coast of Ireland is marginally located in regard to a two days access voyage from England or France. Donegal is well located to Northern Ireland and Scotland to make it a popular cruising destination.
Northern Ireland	Western Scotland, North west England, West Coast of Ireland, East Coast of Ireland, Wales.	Northern Ireland is ideally situated for the Scottish, East of Ireland and Welsh source markets.
Western Scotland	North Western England, Wales, East Coast of Ireland.	Western Scotland represents the central segment of the route. It is the most sailed part of the country and offers a well-developed and wide range of marine and ancillary facilities.
Faroe Islands	Northern Ireland, all coasts of Scotland, Norway, Iceland, Greenland.	To date, the Faroes islands are perceived as a stop off en-route to or from Iceland. While entailing a considerable voyage the Cool Route suggests that more can be done to make The Faroe Islands an iconic final destination in its own right.
Western Norway	Eastern and Northern Scotland, Sweden, The Netherlands, Germany, Poland, Finland, Latvia.	Western Norway is generally highly protected from the open sea. It has a significant range of harbours, experiences hot summers and long daylight hours in summertime.

Based on the foregoing, a significant level of Cool Route marketing can be undertaken cooperatively and aimed at the main shared source markets of Ireland, Northern Ireland, Scotland, England, Wales and France. Separate market should be directed at source markets located on the shorelines of the North and Baltic Seas.

Additionally, vessels from many countries outside of Europe are frequent visitors to Cool Route waters, be they from the USA, the Virgin Islands, Canada, Russia, or Australia. Cool Route marketing and publicity materials can also be selectively directed to target these markets.

While engaging in cooperative route marketing, the partners recognise that competition will still be the order of the day, in terms of attracting sailing visitors to one's own locations. The key point being that with its potential as a globally recognised route, a cooperative high level Cool Route marketing campaign makes good policy, as the returns to scale and recognition levels will be much more significant on a global stage, than any one partner region attempting to internationally market its own coastline.

How will Cool Route successfully target these markets?

As noted above, there are several common denominators in terms of structures, composition and locations of the main target markets for the Cool Route. The cruising preferences study strongly underlined the similarities in terms of what the cruising and superyacht communities want to do and see, what attracts them to sailing new areas and their interest in places which have history culture and a wide variety of things to do and see- beyond sunbathing.

Not all of those based outside of the route may wish to make a two day voyage to access it, but the potential also exists to build levels of yacht charter business along the route. In the Cruising Preferences Study 40% of all respondents (500+) stated that they would favourably consider chartering a vessel to experience a holiday on the Cool Route. Therefore, vessel chartering options should form an important element of the destination offering.

The sailing community is to a degree very uniform, within the British Isles. For example, many sailors will be subscribers to similar yachting and boating magazines.

Marketing the Route Internationally

Part of the strategy is therefore to undertake cooperative international marketing of the Cool Route, with partner regions retaining their own marketing identities-within an overall route context. The target markets are the Cool Route Countries- plus France, Netherlands, Sweden, Germany and the Baltic States. Marketing and publicity can also be selectively targeted at third countries.

In the main, they will be members of sailing and cruising clubs and will follow social media such as Facebook and Twitter on sailing topics. The main point being that Cool Route will not have to contact them individually and there are many common points of connectivity. Yachting and cruising clubs should form the

Fig. 15 Marketing the Route Internationally

main channel of contact to potential sailing tourists. Some of these may also be company or university based groups.

This strategy recommends that the Cool Route should produce a high quality brochure- covering aspects as:

- Route scenery, wildlife, things to do and see
- Yacht chartering opportunities
- Availability of memberships in route yacht clubs
- Potential to base vessels on the route and fly to sail
- High quality marketing brochures should be sent to every yacht and cruising club in target markets and requests also made for coverage of the Cool Route in Newsletters and websites.
- Local identification raising – Cool Route Flags on participating marinas and providing items such as Cool Route burgees, caps or tee shirts.
- The Cool Route Information and Booking system, will give a great deal of valuable and interesting information on the route and should be the main web based presence as the route moves to its post project phase. The platform will provide a very valuable means of marketing the route, while also giving access to bookings and information on a wide range of service providers on the route.

- The realisation and commercial aspects of developing the route are ongoing. These aspects will contain exciting initiatives, which will significantly highlight the route to the global sailing community- copper-fastening the route as a classic voyage and a 'must to sail'.
- It is expected that additional inputs from the Cool Route Workpackage on Route Realisation and Commercialisation, will contribute to the final design of marketing materials.
- A concerted effort needs to be made to secure more articles in the sailing press on sailing Cool Route locations.

Marketing sailing locations has traditionally taken place at International Boat shows which take place annually at locations such as London, Southampton, Glasgow, Ghent, Cannes, Helsinki and Dusseldorf. Cool Route partners and associate partners such as sail Scotland, RYAs in the UK, Yacht Clubs and Marina Federations are regular stand holders at such exhibitions, particularly at the Southampton Boat Show, It is recommended that in lieu of having a dispersment of different marketing stands- at the Southampton Boat Show, that on a trial basis one Cool Route stand be operated.

The visual impact of a large well designed and present Cool Route stand would have far greater impact than any one stand. In keeping with the concept of partners cooperating while still competing, the overall stand would have regional booths for each of the partners who present at such events. A receptionist can be provided to give administrative cover to all demonstrators, a press briefing and reception would also form part of the stand activities. Apart from the impact of scale, cost savings and assistance with manning and set up costs may be attractive.

Levels of national tourism support for sailing vary very widely and Sail Scotland is a prime example of a national marketing body taking up the challenge to develop sailing tourism. All other Cool Route regions need to lobby national tourism bodies to also become proactive in the sector.



Next Steps

Next Steps

The next and immediate steps will witness the commencement of a discussion with partners, associate partners and key stakeholders on the potential of taking a significant shared Cool Route Stand, at a forthcoming International Boat Show.

Parallel with this action, the partners are progressing the Cool Route Information and Booking System towards finalisation and that system should also closely reflect the agreed marketing strategy.

In developing and publishing the marketing brochure, a common branding will be developed with the Information and booking system- leading to a seamless experience of planning a voyage on the Cool Route. The Cool Route Business Plan, due for completion in 2017, will serve to focus the project's engagement with a wide range of enterprises throughout the route, who while being the main planned beneficiaries of increased route traffic, will also have very important roles to play in encouraging enhanced levels of sea borne tourism to local areas.

The Cool Route Realisation and Commercialisation Strategy will also be completed in 2017 and in its development, will contribute additional initiatives, which while intended for delivery post project, will possibly add significant ideas and factors to raise global awareness and recognition of the route. These factors will be of considerable important in encouraging voyages on all or parts of the route.

Marketing Headlines

The strategy is to produce a Cool Route brochure promoting voyages by local sailors on the route and inviting others to come to experience all that the Cool Route can offer. Part of this marketing campaign will be to make information available or cruising chartered vessels, either bareboat or crewed.

Marketing materials should also cover the advantages of keeping a vessel on the route, together with the cost saving aspects of commuting by air – to sail.

Memberships availability in Yacht Clubs on the route should also be publicised with a view to encouraging higher levels of owner' embeddedness within the route.

Additionally, in situ marketing is recommended taking the form of a flag or banner at all Cool Route stopovers welcoming sailors to the Cool Route. Stopovers should also carry route brochures and perhaps have some small promotional materials such as tee shirts, caps or burgees for distribution to visiting cruising crews.

Fig. 16 Marketing Headlines



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References and Bibliography

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The Cool Route Marketing Strategy

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