



KIMA 2017

KOREA INTERNATIONAL MARINE LEISURE WEEK

WEEK

☆☆☆☆

제5회 대한민국 국제해양레저위크
The 5th KOREA INTERNATIONAL MARINE LEISURE WEEK 2017

Program Book

발표자료집

2017 한국스포츠관광학회 추계학술대회 및 제2회 스포츠관광진흥 대학생 아이디어 공모전

일시 2017. 9. 23(토) - 9.24일(일)
 장소 부산 해운대구 아르피나유스호스텔 8층 시갈홀
 참가 인원 약 100명
 주제 해양레저스포츠관광을 통한 연안도시 발전과 미래
 행사 내용 발표(기조, 오랄 및 포스터), 토론 및 공모전

주최   한국스포츠관광학회
 Korea Society for Sport Tourism

주관 영산대학교 해양스포츠레저산업 전문인력육성사업단
 해양레저 운송디자인 전문기술 서비스 다양화 비즈니스 모델 개발 연구팀

후원  해양수산부

대한민국 해양의 미래를 엽니다

Korea Marine Leisure Network



사단법인 한국해양레저네트워크_ 부산광역시 수영구 감포로 8번길 69
 KOREA MARINE LEISURE NETWORK_ 69, Gampo-ro 8beon-gil, Suyeong-gu, Busan, Korea
 T. +82 51 760 1130 F. +82 51 760 1134 E. komalnet@naver.com



KIMA WEEK 2017 Overview

Title	KIMA WEEK 2017 Grand Opening & International Conference
Time/Date	14:00-15:00 September 20th(Wed.), 2017
Venue	Haeundae Nurimaru APEC House, Busan
Hosted	Ministry of Oceans and Fisheries, Busan Metropolitan City
Organized	Korea Marine Leisure Network
Purpose	<ul style="list-style-type: none"> The Official Grand Opening Ceremony of the 5th KIMA Week for 7 days which aim for the harmonized convergence of Culture, Tourism, and Marine Leisure. To expand the base of industry of marine leisure which is considered as new leading business in Korea with experts, professional and officials in relevant Industries, Universities and Institutes.

Program at a Glance

Time	Program
13:00-14:00	Registration
Grand Opening	
14:00-15:00	Opening Performance Opening Declaration Parade Show Vision Video Opening & Welcome Speech Congratulatory Message KIMA Awards Celebration Video Group Photo
International Conference	
15:00-17:30	Theme: The development of marine leisure industry in Asia and its impact on job creation Moderated by Professor Woo-Jung Cho, Korea Maritime & Ocean Tourism Speakers: - 15:10-15:30 Udo KLEINITZ, Secretary General, ICOMIA Boat & Yacht Industry Development in Asia - 15:30-15:50 George, CEO, MBS, Singapore IR and its effect on regional Economy - 15:50-16:10 Satoru HONDA, Manager, Japan Marine Industry Association Current Development & Issues in Japan Marine Industry - 16:10-16:30 Cheol-Woo Kim, Professor, Youngsan University Development Plan for Korea Marine Leisure Tourism Industry 16:30-16:50 Coffee Break 16:50-17:30 Panel Discussion / Q&A Panels - Peter Scharppen, Vice President, Northwest Maritime Trade Association - Bu-Rim Choi, Busan Tourism Organization - Udo KLEINITZ, Secretary General, ICOMIA - Satoru HONDA, Manager, Japan Marine Industry Association
17:30-18:30	Networking Reception
September 23	
10:00-17:00	Autumn Symposium of KSST (Korea Society of Sports Tourism and Idea Contest of marine leisure tourism from the young) Co-hosted Korea Marine Leisure Network

KIMA WEEK 2017 개요

행사명	제5회 대한민국 국제해양레저위크 그랜드 오픈 및 국제 컨퍼런스
일시	2017년 9월 20일(수) 14:00~15:00
장소	해운대 누리마루 APEC하우스
주최	해양수산부, 부산광역시
주관	(사)한국해양레저네트워크

세부 프로그램

시간	프로그램
13:00-14:00	등록
그랜드 오픈	
14:00-15:00	개막공연, 개막선언 해상퍼레이드, 비전영상 개회사, 환영사 해상퍼레이드, 축사 KIMA Awards[산업육성/학술연구/교육문화] 해상퍼레이드, 축하영상 축하공연, 위촉패 전달 VIP 기념촬영 및 장내정리
국제 컨퍼런스	
15:00-17:30	발표1: 아시아 요트/보트 시장 발전 현황 UDO KLEINITZ, ICOMIA(세계해양산업협회) 사무총장 발표2: 복합리조트와 지역경제 발전 성과 George Tanasijevich, MBS(마리나베이샌즈) 싱가포르 CEO 발표3: 일본 해양레저산업 발전 현안 Satoru HONDA, JMIA(일본해양산업협회), 국제부 부장 발표4: 한국 해양레저관광 발전전략 김철우 영산대학교 교수 커피 브레이크 토론 및 질의응답 토론자 Peter Scharppen, 미국 북서해양무역협회 부회장 최부림, 부산관광공사 기획상품개발팀장 UDO KLEINITZ, ICOMIA(세계해양산업협회) 사무총장 Satoru HONDA, JMIA(일본해양산업협회), 국제부 부장
17:30-18:30	Networking Reception
September 23	
10:00-17:00	한국스포츠 관광학회 추계학술대회 및 제2회 스포츠관광진흥 대학생 아이디어 공모전



List of Yacht participating in Yacht Parade in KIMA WEEK 2017 2017 KIMA WEEK 개막식 해상 퍼레이드 참가 요트

구분	상호명	선명	특성(최대승선인원)
1	부산해경 (용호만)	순찰정	인솔정
2	요트탈래	YAHCT TALE-A	카타마란(12명)
3	요트위크	SEAWIND	세일링 요트(10명)
4	요트야	458이탈리아	세일링 요트(10명)
5	아이리시요트투어	클리퍼	세일링 요트(20명)
6	퀸비(코마린)	퀸비	파워요트(10)
7	루나요트	루나	세일링 요트(10명)
8	(주)블루마린 (더베이)	매트릭스760	카타마란 (50)
9	한일레저	아틀란타	세일링 요트(10명)
10	국민안전교육진흥회	페르마	세일링 요트(10명)
11	에어픽스보트앤	보트앤	카타마란(20명)
12	세일링코리아	비바리	세일링 요트(10명)
13	요트홀릭	요트비	카타마란(20명)
14	(주)아이지이	commonbay	세일링 요트(10명)
15	부산오션투어	솔로비행	세일링 요트(10명)
16	(주)다이아몬드베이 (용호만)	마이다스	카타마란 (70명)

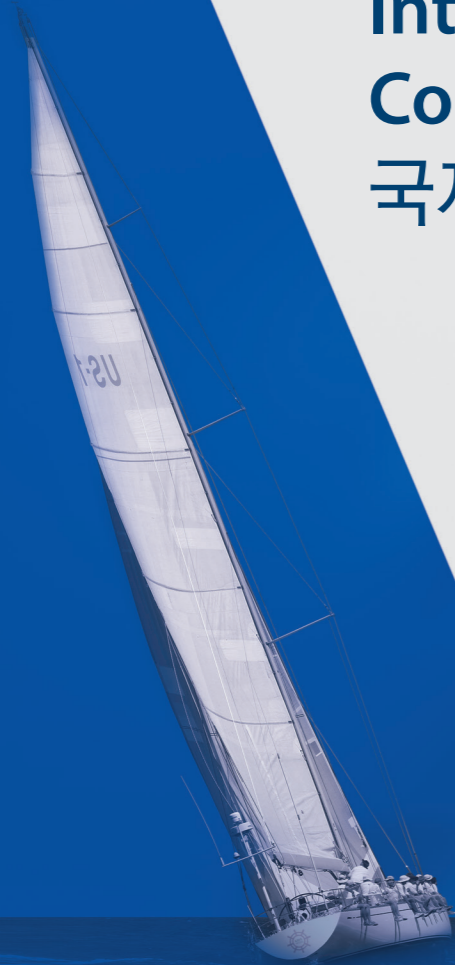
Winners of Marine & Leisure New Business and Venture Idea Contest

해양관광창업벤처사업 창업 아이디어 수상자

해양관광 시장 개척을 위한 창의적인 아이디어를 발굴하고
사업화를 지원하는 '해양관광벤처사업 공모전' 수상자를 대상으로 홍보관을 설치하여
다양한 지원을 제공

No	Type of Business	Name of Company	대표자	창업아이디어 아이템	
1	IT기반형	그래비티	김동길	낚시정보 공유서비스 '모두의 낚시'	
2		워터라이더	박지란	한국형 온라인 요트교육 콘텐츠제작	
3	시설기반형	요트월드코리아	김진호	중고요트 및 폐선을 활용한 요트 스테이 모듈제작 및 공유 플랫폼 개발	
4	체험기반형	레드마린	마성원	샤이니보트(야간운항사업)	
5		주식회사 크레스	최상아	모험선 체험 (선박안전교육을 주제로 한 미션수행)	
6		씨알	임종민	기내배양시스템을 활용한 해양관광상품 '관상 수초화분' 개발	
7		서울가스트로투어	강태안	Great Journey to find disappearing food heritage. 사라져가는 전통 음식 문화유산 "자염"을 탐험하는 신비한 바다여행	
8		월드리더스클럽	이지민	호텔과 함께하는 전통 수산시장 WLC 패키지	
9		기타형	와이케이서프	유경호	유경호의 서핑팩토리
10			-	정수찬	Yacht & People

International Conference 국제 컨퍼런스



The development of marine leisure industry in Asia and its impact on job creation

아시아 해양레저관광산업 발전과 일자리 창출성과



Boat & Yacht Industry Development in Asia

아시아 요트/보트 시장 발전 현황
UDO KLEINITZ, ICOMIA(세계해양산업협회) 사무총장



IR and its effect on regional Economy

복합리조트와 지역경제 발전 성과
George Tanasijevich, MBS(마리나베이샌즈) 싱가포르 CEO



Current Development & Issues in Japan Marine Industry

일본 해양레저산업 발전 현안
Satoru HONDA, JMIA(일본해양산업협회), 국제부 책임



Development Plan for Korea Marine Leisure Tourism Industry

한국 해양레저관광 발전전략
김철우 영산대학교 교수



Moderator

Woo-jeong Cho

Department of Ocean Physical Education, Korea Maritime and Ocean university

Professional Experience

- Busan Metropolitan City, Marine Leports Budget Review Member Busan, Republic of Korea 2013 - 2015
- Busan Metropolitan City, Tourism Promotion Committee Member Busan, Republic of Korea 2011 - 2015
- Korea Society of Golf Studies Editor Asan, Republic of Korea 2015 - Present
- Korea Society for Sport Tourism International Director Busan, Republic of Korea 2015 - Present
- Korea Society for Sport Management Director Busan, Republic of Korea 2009 - Present
- Korea Maritime and Ocean University Professor, Department of Ocean Physical Education Busan, Republic of Korea 2008 - Present

Education

- University of New Mexico 2011 - 2004
Ph. D. in Sports Management
- University of New Mexico 1999 - 2001
MBA in Sports Management
- Mokpo University 1990 - 1998
Bachelor's degree in Physical Education

Research

- Market segmentation Depending on Relationship Quality of Pro-Volleyball spectators Jun. 30 2016
The Korea Journal of Sports Science
- Content analysis of court decisions regarding golf-related injuries Jun. 25 2016
Journal of Physical Education and Sport
- The Relationships among Business Environment, Strategic Decision-Making and Organizational Performance in Fitness Clubs Feb. 29 2016
The Korea Journal of Sports Science
- A study on the Spectators' Consumption Behavior, Determinant Factors of Spectators' Attendance and Satisfaction of Spectators in Korean Pro-Baseball Jan. 31 2016
The Korea Journal of Sports Science
- A study on the Economic Valuation of Public Goods Generated by a Professional Sport Stadium Dec. 31 2015
Korean Journal of Sport Management



KIMA 2017
KOREA INTERNATIONAL MARINE LEISURE WEEK
WEEK *****



Boat & Yacht Industry Development in Asia



Speaker

UDO KLEINITZ

Secretary General, ICOMIA

Udo Kleinitz works in the marine industry since 1993. He worked mainly on wooden yachts for 15 years and obtained the German master boatbuilder qualification. In 2008, he started to work in associations, firstly as ICOMIA Technical Manager, followed by a position as Head of Technical Services at the British Marine Federation, and from 2015 onwards as ICOMIA's Secretary General. Main focus of ICOMIA's work is the removal of trade barriers, provision of industry statistics and supporting the growth of the industry, both in new and existing markets. Udo is a passionate sailor usually sailing with family and friends in the English Channel and Mediterranean.

The development of marine leisure industry in Asia and its impact on job creation

Summary

Despite a great heritage of commercial and leisure boating activity as well as passion for boating related activities such as fishing, there are vast parts in Asia where recreational boating is an unexplored concept. Many in our industry believe there is great potential for boating in Asia and there are numerous efforts made to introduce boating infrastructure in currently blank areas in Asia, by building new marinas and an increasing number of boat and equipment manufacturers present to either build or import into Asian markets.

These efforts usually are the result of market strategies of individual companies acting on their own initiative. Significant growth however requires patience, and an orchestrated strategy to ensure:

- Boating and boating facilities become broadly available (opposite to being an elitist activity, tucked away in gated luxury clubs) by creating public marinas connected to nautical tourism
- Sensible and industry-friendly regulation and taxation is in place
- Support of grass-root boating

Key to deliver this strategy is a unified industry that delivers a consistent message and government support

ICOMIA is the international organisation connecting the global marine leisure industry community. Its 36 full members and approximately 60 sustaining members come from all over the world, from fully developed markets such as North America, Europe, Australasia and Japan, to areas where boating is less densely in use such as Latin America and Asia. ICOMIA conducts lobbying activities in international organisations such as UN and EU institutions and creates the forum for its members to discuss policy matters to remove barriers to trade.



ICOMIA
INTERNATIONAL COUNCIL OF
MARINE INDUSTRY ASSOCIATIONS

Vision

Leading a successful recreational marine industry

Mission Statement

Act as the voice of the recreational marine industry worldwide, to facilitate, inform, influence and research

The Recreational Marine Industry's
International Trade Association, since 1966

Objectives

– or why there is need for a global industry association

- **Member forum** to consider issues of common concern, to collect relevant data and to formulate agreed policy
- Seeks to **break down all barriers to trade**, including the removal of unnecessary or unviable legislation
- Promotes awareness of the leisure marine industry's requirements and objectives, including the improvement of **boating safety**
- Promotes the concept of recreational boating as being in **harmony with a clean and attractive marine environment**
- Maintains close **dialogue** with international bodies, national governments and other regulatory authorities on behalf of its members



Our national members

36 marine industry association members* – across 34 countries

*Representing builders, equipment, operations Small craft, LY



Core activities

- Technical regulations
- Environmental regulations
- Provision of industry statistics
- Lobbying at:
- Inter-Governmental Organisation level (UN, EU, etc)
- Support at national level where no national Marine Industry Association

Operations

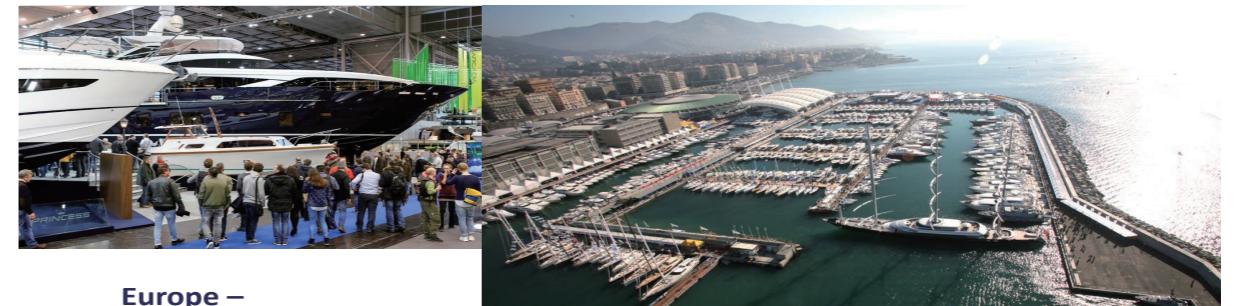
- 3-staff Secretariat
- 2 full time consultants
- 10 Committees and Groups (100 members)
- Neutral resource representing only the industry





Marine leisure industry

2016 and prospects



Europe –

Financial turmoil, potential break up of the EU, mass immigrant crisis and terrorism – compared to pre 2008 figures 48% decline in new boat registrations, 60% drop in sales

Overcapacity and intense price competition – multiple acquisitions, mergers and business closures to bring capacity in line with lower demand

Despite these challenges, **recovery** across most EU main boating markets + **return to profitability** while continuing to invest in expansion and product innovation



Ongoing improvement of the US economy

Effects for boat builders in both the US and abroad (Italy, France, the UK, Australia), strong US\$ extra buying power for exports to US
Key: fresh products and attractive pricing

Economic challenges and reduced sales in **new markets** (BRIC)
ICOMIA supporting efforts in certain Latin American and Asian countries



Boating remains an immensely popular activity:

- 87.3 million in the United States
- 13.2 million in Canada
- 9 million in France
- 3.5 million in the UK
- 2.5 million in Sweden

Effects in industry

- 100,000 direct companies (primarily small to medium-sized businesses),
- 1 million direct employees,
- 25 million recreational boats, and
- 25,000 marinas
- More than \$40 billion in manufacturing turnover

Extensive indirect economic contributions from highly varied supply chain and array of services related to recreational boating



Economic contributions from highly varied supply chain and array of services related to recreational boating

British Marine Federation		
Economic Benefits of UK Boating Tourism		
	GVA	FTE Employees
Total Economic Contribution of UK Boating Tourism	£3.7 billion	96,000
Boating tourism industry direct	£264 million	9,000
Boating tourism industry suppliers	£170 million	6,000
Wider tourism expenditure of boaters	£3.3 billion	81,000
UK Boating Tourism Businesses		2,050

www.britishmarine.co.uk/research

British Marine:

- The total economic contribution of UK boating tourism in terms of **GVA is 14 times larger** than the core boating tourism industry
- For every 1 job in the core boating tourism industry, **a further 10 jobs** are supported in the wider UK economy



PARADIGM SHIFT



Change in Paradigm?

– boating „one of many activities“ in consumer behaviour?

Rise of flexible concepts in boat ownership

Charter, Boat-Sharing, Peer-to-Peer
Need to invest in service provision?

Aging population

Creation of boating campaigns (and change in sales approach?)

– kick-off Discover Boating in USA
2016 GER, Spain, NL

Aging fleet

Financially feasible, large scale scheme needed for boats reaching the end of their lifetime?

Scrapping schemes provided a needed incentive to boost low car sales during the global recession

Yes, I have a
RETIREMENT PLAN
I'll Be Boating.



Market forecasts

„Difficult“ Market segments:

- Petrol and Diesel Inboards
- Sailing yachts except dinghies

Primarily external factors with potential to limit growth:

- Global instability (EU/US/Korea) affecting consumer confidence
- Mass immigration from Middle East
- Slowdown in the Chinese economy
- Restrictive legislation or taxes aimed at 'luxury goods'

Uncertainties become Normality

2017/18 likely to be similar to 2016 – currently **stable**

Some internal challenges within consumer behaviour and the industry –



What does boating need to Grow?

- A healthy and growing economy
- A strong and upwardly mobile middle class
- Supportive Government Policies—Advocacy by Industry
 - Infrastructure—Marinas and Boat Ramps
 - Minimal taxation – No Luxury Taxes
 - Appropriate Laws and Regulations that Facilitate Boating
- Positive Messaging and Promotion
- Distribution and Service Infrastructure
- Focus on Product Quality and Customer Satisfaction



What does boating in Asia need to Grow?

- A healthy and growing economy
- A strong and upwardly mobile middle class
- Supportive Government Policies—Advocacy by Industry
 - Infrastructure—Marinas and Boat Ramps
 - Minimal taxation – No Luxury Taxes
 - Appropriate Laws and Regulations that Facilitate Boating
- Positive Messaging and Promotion
- Distribution and Service Infrastructure
- Focus on Product Quality and Customer Satisfaction



KIMA 2017
KOREA INTERNATIONAL MARINE LEISURE WEEK
WEEK



The Marine Ecosystem Matters



IR and its effect on regional Economy



Speaker George Tanasijevich

President and Chief Executive Officer, Marina Bay Sands Pte Ltd
Managing Director – Global Development, Las Vegas Sands Corp.

George Tanasijevich is the President and Chief Executive Officer of Marina Bay Sands Pte Ltd, a subsidiary of leading global integrated resorts developer, Las Vegas Sands Corp. and Managing Director of Global Development for Las Vegas Sands Corp. A senior management executive and accomplished attorney with extensive international experience, Mr. Tanasijevich is responsible for overall operations of Marina Bay Sands and the development activities of Las Vegas Sands Corp.

Mr. Tanasijevich played a central and instrumental role project managing Las Vegas Sands Corp.'s successful bid to develop Singapore's integrated resort at Marina Bay. In this capacity, he was the company's senior representative in Singapore overseeing a large team of professionals from the financial, legal, construction, design, operations and marketing fields. He was also responsible for coordinating the development of the property which combines state-of-the-art convention and exhibition facilities, a luxury hotel, world-class gaming, entertainment, shopping and dining outlets and a museum in one landmark structure.

Prior to his involvement in the company's Singapore activities, Mr. Tanasijevich was based in the People's Republic of China Special Administrative Region of Macau as Director of Development, responsible for the coordination of various commercial activities related to Las Vegas Sands Corp.'s Cotai Strip™ projects.

Mr. Tanasijevich previously served as Senior Vice President / Equity Markets at CapitaLand Limited in Singapore, Southeast Asia's largest real estate conglomerate. Prior to joining CapitaLand, Mr. Tanasijevich served as Corporate Vice President of General Growth Properties, which was at that time the second largest shopping mall REIT in the United States. This followed his assignment as General Growth's senior attorney, responsible for heading the company's litigation group and managing litigation across 38 states.

Mr. Tanasijevich has an MBA from the University Of Chicago Booth School Of Business, a law degree from Loyola University of Chicago, where he was a member of the law review, and a bachelor's degree from the University of Michigan. He is a member of the University Of Chicago Booth School Of Business Global Advisory Board, and a Board Member of the Singapore International Chamber of Commerce and the Singapore Hotel Association and was named by Global Gaming Business as one of its "25 People to Watch" for 2009.



KIMA 2017
KOREA INTERNATIONAL MARINE LEISURE WEEK
WEEK



Current Development & Issues in Japan Marine Industry



Speaker Satoru Honda

Manager of International and technical affairs, Japan Marine Industry Association

Work Experience

- Apr. 2015~present : Japan Marine Industry Association
Position : Manager
- As of Mar.2015, retired Nissan Marine
- As of Oct.2013, retired Nissan Motor (reach the age limit)
- Apr. 2009~Mar.2014 : China Zhangzhou Nissan Marine Co. LTD
Position : President (concurrently work)
- Apr. 2004~Mar. 2006 : Nissan Marina Tokai Co. LTD
Position : President (concurrently work)
- Apr. 2002~Mar. 2015 : Nissan Marine Co. LTD
Position : Managing director
- Jul. 1999~Mar. 2002 : Nissan Marina Tokai Co. LTD
Position : Managing director
- Jan. 1990~Jun. 1999 : Nissan Motor Co. LTD
Position : Manager of marine division
- Apr. 1976 - enter Nissan Motor Co. LTD
R & D Department of Marine division

Education

- Yokohama National University, Japan (Apr. 1972 - Mar. 1976)
- Bachelor degree of ship building, naval architect

Language

Japanese

KIMA WEEK



- * Current status of Japan marine industry
- * Introduction of marine events
- * 10 year vision
- * Jobs of marine industry
- * Suggestion to Korea marine industry

September 2017
Japan Marine Industry Association

Current status of Japan marine industry

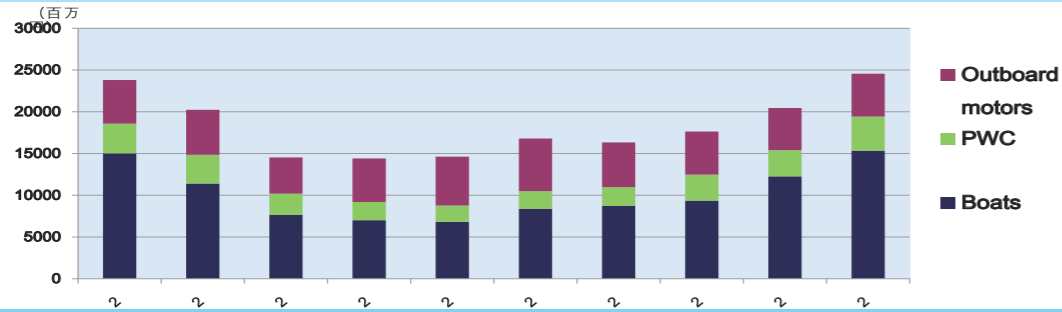




1 Domestic market(include imported products) 2016



- Shipping value of motor boats, PWCs and outboard motors 2.2 billion US\$, up 20% from the previous year, recovered to the same level of 2007, before the global financial crisis
- Motor boats : up 25% →over 10m boats boosted



Million yen

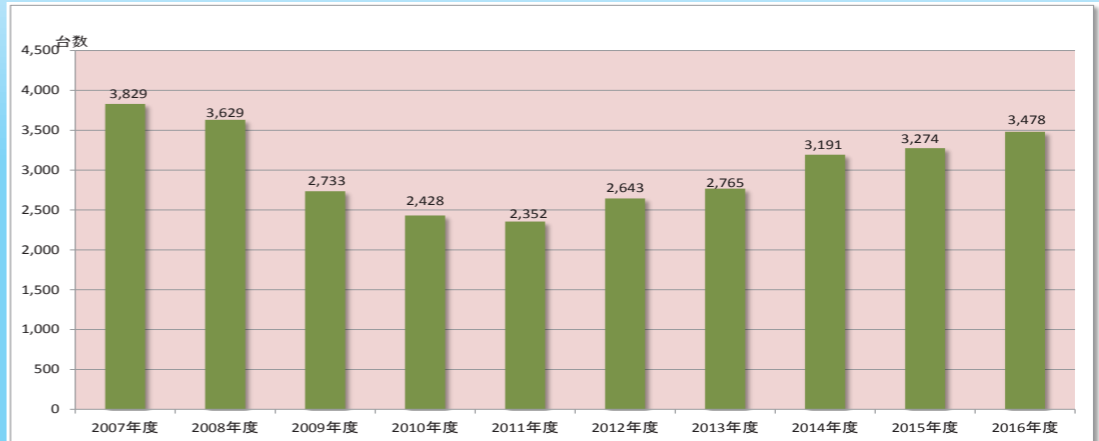
	2007年	2008年	2009年	2010年	2011年	2012年	2013年	2014年	2015年	2016年	前年比
Boats	15,157	11,408	7,677	7,014	6,816	8,392	8,722	9,361	12,262	15,339	125%
PWC	3555	3,442	2,514	2,179	1,950	2,101	2,249	3,106	3,144	4,083	130%
Outboard motors	5221	5,386	4,333	5,212	5,861	6,302	5,353	5,167	5,044	5,135	102%
TOTAL	23,933	20,236	14,524	14,405	14,627	16,795	16,324	17,634	20,450	24,557	120%

JMIA集計 (速報値)

3 The newly inspected number of Personal Water Craft in FY2016



- Data by Japan Craft Inspection
- Market is recovering from 2012
- 2016 : up 6% from the previous year

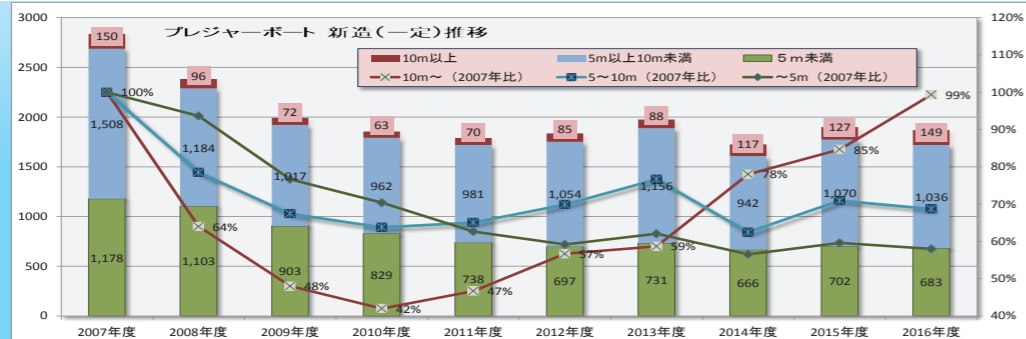


年	2007年度	2008年度	2009年度	2010年度	2011年度	2012年度	2013年度	2014年度	2015年度	2016年度	前年比
台数	3,829	3,629	2,733	2,428	2,352	2,643	2,765	3,191	3,274	3,478	106%

2 Shipping number of motor boats in fiscal year 2016



- Market of less than 5m boat is decreasing due to spread of inspection free boats. ※2
- Market of from 5 to 10m boat is seesawing. Sales tax increased to 8% from 5% in 2014.
- Market of 10m and more boat is increasing from 2011.
- Market in 2016 : even in total, over 10m is up 21% (plus 35 units) from the previous year.



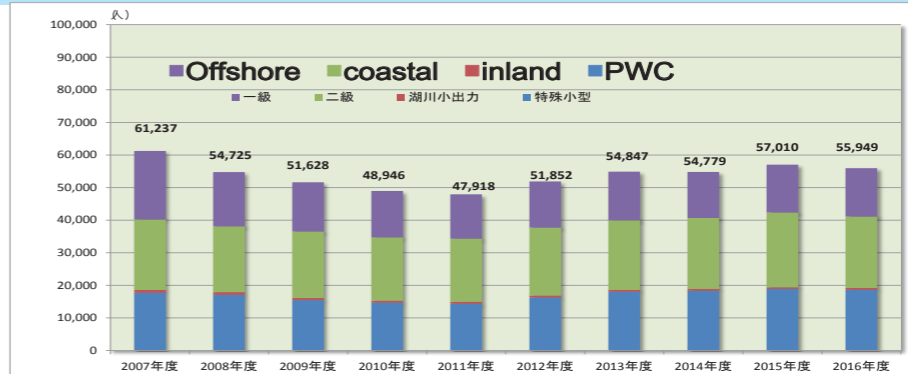
	2007年度	2008年度	2009年度	2010年度	2011年度	2012年度	2013年度	2014年度	2015年度	2016年度	前年比
10m以上	150	96	72	63	70	85	88	117	127	149	117%
10m~ (2007年比)	100%	64%	48%	42%	47%	57%	59%	78%	85%	99%	
5m以上10m未満	1,508	1,184	1,017	962	981	1,054	1,156	942	1,070	1,036	97%
5~10m (2007年比)	100%	79%	67%	64%	65%	70%	77%	62%	71%	69%	
5m未満	1,178	1,103	903	829	738	697	731	666	702	683	97%
~5m (2007年比)	100%	94%	77%	70%	63%	59%	62%	57%	60%	58%	
合計	2,836	2,383	1,992	1,854	1,789	1,836	1,975	1,725	1,899	1,868	98%

※1 . Data by JCI (Japan Craft Inspection) ※2 . Exclude inspection free boat (under 3m and under 2PS)
 ※3 . Line graph : Set 2007, before financial crisis, to base year 100%.

4 The number of boat licensee



- Data by Japan Marine Recreation Association
- We have 4 license types, offshore, coastal, inland and PWC. Total number of license is slightly down.



	2007年度	2008年度	2009年度	2010年度	2011年度	2012年度	2013年度	2014年度	2015年度	2016年度	前年比
一級	21,042	16,628	15,126	14,233	13,607	14,143	14,924	14,126	14,659	14,843	101.3%
二級	21,630	20,230	20,400	19,437	19,376	20,841	21,346	21,793	22,942	21,913	95.5%
湖川小出力	853	799	658	607	597	619	575	555	519	576	111.0%
特殊小型	17,712	17,068	15,444	14,669	14,338	16,249	18,002	18,305	18,890	18,617	98.6%
計	61,237	54,725	51,628	48,946	47,918	51,852	54,847	54,779	57,010	55,949	98.1%



Introduction of our marine events

1 . COMMON ISSUES



SAFETY

- ❑ To ensure safety of small boats, we have conformity label, give instruction manual and make DVD video.
- ❑ To reduce number of drifting boats by machinery failure, we posted extracted owners manual and check list on our homepage.

ENVIRONMENT

- ❑ FRP boat recycle system was launched in 2005. Total of 7.000 boats have been treated. About 500 boats are treated in recent years. (Ref 1)
- ❑ Voluntary industry standard of exhaust gas and PWC sound.

INFRASTRUCTURE

- ❑ Request government to improve boat storage environment.
Ministry of Land, Infrastructure, Transport and Tourism
Fisheries Agency

Strategies of Japan marine industry



COMMON ISSUES

- Variety of inexpensive and safe products
- Promotion of environmentally friendly measures
- Improve infrastructure for easy access to marine leisure

TARGET1 licensee → Encourage participation of boating

- Securing variety of places to enjoy marine leisure
- Display and sea trial of boats and sailing yachts (Boat Show)
- Variety of inexpensive activities, driving lesson and/or rental boat

TARGET2 non-licensee → Give more chances to enjoy boating

- Holding events, MARINE CARNIVAL to create new demand
- Variety of activities without license to enjoy boating
- Operate our website BOATING JAPAN to transmit marine general information

2 . licensee → participation of boating



International Boat Show (Ref 2)

- Venues : Pacifico Yokohama & Yokohama Bayside Marina
- Visitors : 52,252 people Mar. 2 ~ 5 2017 → Mar. 8 ~ 11 2018



Boat Game Fishing (Ref 3)

- Location : 14 places
- Participant : 323 boats 1,193 people → 19 places in 2017



PWC test-ride

- Location : Syonan Jet Field (3 manufacturers Joint test-ride)
- Participant : 98 people April 2016 → April 2017 MG Marine 66 person



Small boat Festival Fishing competition, Lecture for safety

- Tomakomai : Participant 33 boats, 54 people June 2016
- Tateyama : 14 boats, 25 people Oct. 2016
- Tomakomai : June 2017 and Tateyama : Nov. 2017



Local Boat Show (Ref 4)

- Location : 10 places, 3 boat shows were canceled due to Kumamoto earthquake
- Visitors : 24,000 people → 14 places in 2017



Rental boat experience week (Ref 5)

- Area : Kanto (April and November) 、 Chubu · Kansai (November)
- Cooperated marinas : April 13, Nov. 29社 → April 2017 Kanto · Chubu 27社, 152名
- Number of experiences : April 103名/Nov. 173people (2017) Oct.-Nov



3 . non-licensee → Give chances to enjoy boating



Hold MARINE CARNIVAL (Ref 6) The 3rd CARNIVAL in 2017

- Date : June 4(Sat), 5(Sun) → June 3(Sat), 4(Sun)
- Venue : URBAN DOCK LaLaport TOYOSU → LaLaport TOYOSU and KOBE (July 29 and 30 2017)
- Target : Family in their 30s and 40s
- Content : Display boats and engines, Sea trial, Small boat ride in pool, Lecture of boat license
- Participant : about 2,900 people According to the questionnaire, they have high interest in marine leisure.



Increase boat driving opportunities Continue to run in 2017

- ①Marine Challenge(UMI Council) : About 300 people experienced boats and PWC driving in June 2016 → Change name to MARINE CARNIVAL in June 2017
- ②Sea Festival Higashi-Mikawa : About 350 people experienced driving at Gamagori on July 2016 → "Sea Festival KOBE" (MARINE CARNIVAL KOBE)
- ③Kisarazu UMI Festival : 330 kids experienced driving in Sep. 2016 Every Sep.



Run Website"BOATING JAPAN" and provide information

- In order to correspond to SNS, the top screen was refurbished.
- As a result of efforts to strengthen the publicity of the site, the number of accesses has doubled as compared with the previous year. → Enhance promotion skills and contents. Connection with marine leisure industries and government.

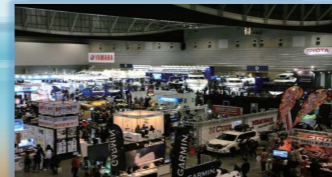
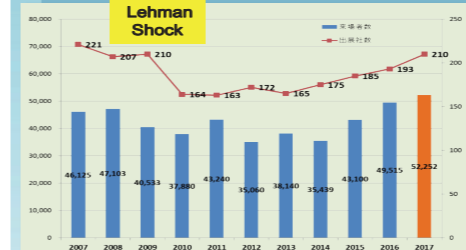


Ref 2 Japan International Boat Show 2017



56th Japan International Boat Show Held in Yokohama for 11 years
Largest number of visitors
Number of exhibitors recovered before the financial crisis

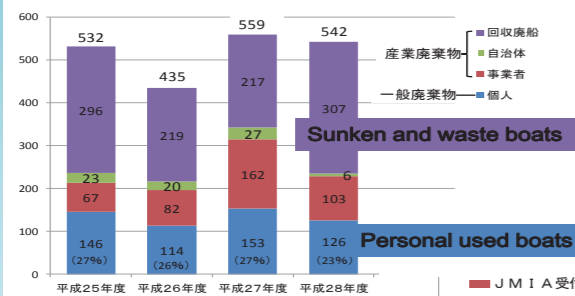
218 exhibitors / 213 boats
52,000 visitors in 4 days



日程	来場者数	2017年			(2会場合計)		
		合計	パシフィコ横浜	横浜ベイサイドマリーナ	2016	2015	2014
3月2日(木)雨	6,712名	5,528名	1,184名	7,324	7,258	5,331	
3月3日(金)晴れ	11,233名	8,731名	2,502名	9,605	8,540	6,587	
3月4日(土)晴れ	16,406名	11,843名	4,563名	15,568	12,769	11,867	
3月5日(日)晴れ	17,901名	13,759名	4,142名	17,018	14,532	14,355	
◆累計	52,252名	39,861名	12,391名	49,515	43,100	38,140	

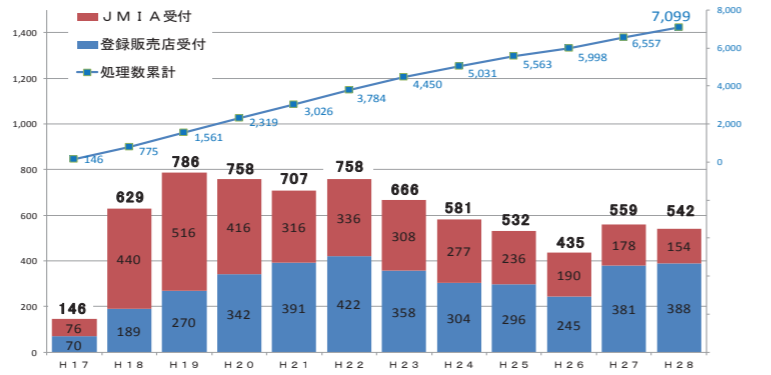


Ref 1 FRP boat recycle, treated data



542 boats are treated in 2016 as planned. Number of personal used boats is not growing. So we have started to distribute flyers to boat owners for three years.

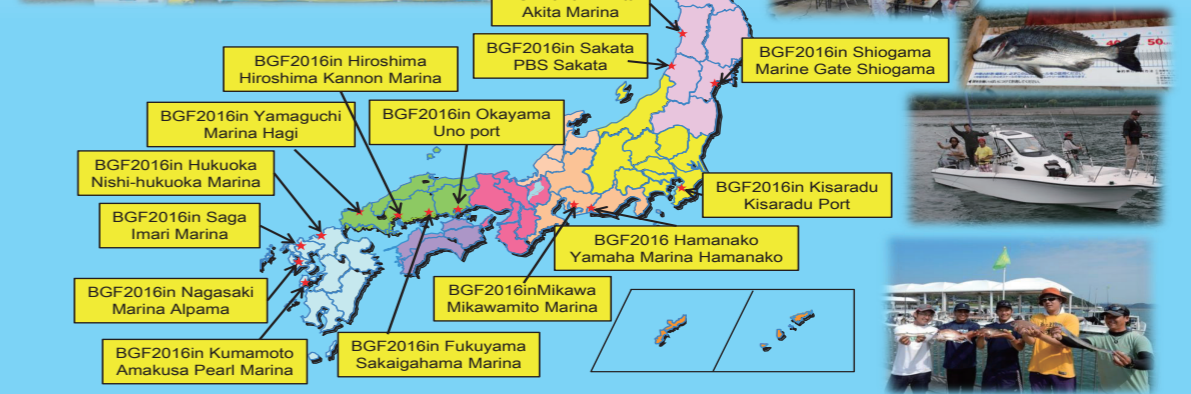
Another problem is the lack of financial resources of local governments.



Ref 3 BOAT GAME FISHING



BOAT GAME FISHING in 2016
14 places
Participant : 323 boats 1,193 people

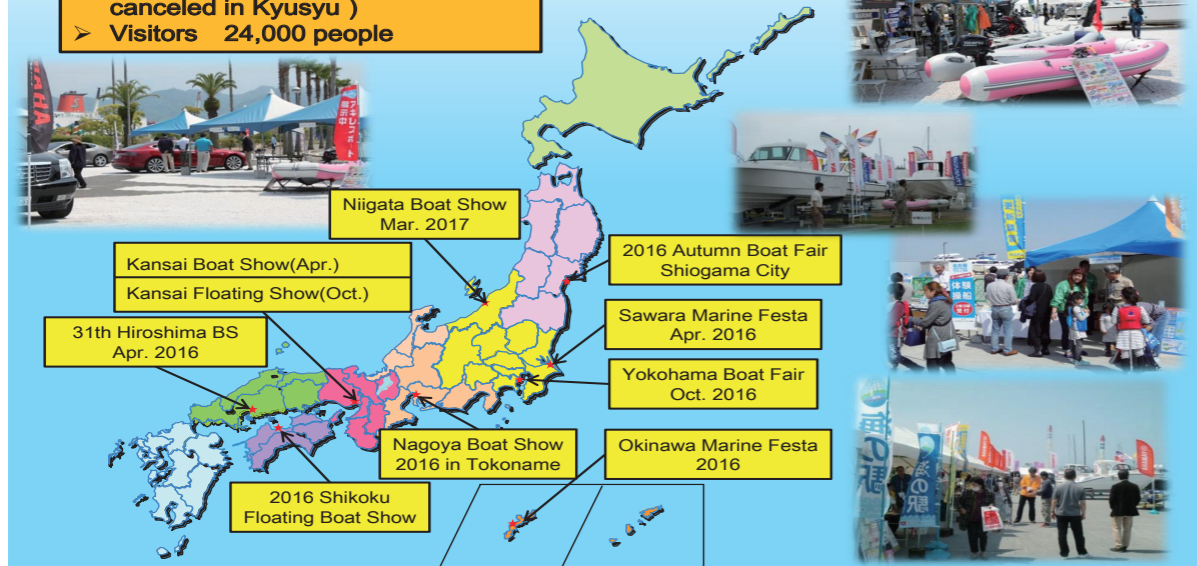




Ref4 Local Boat Show



Fiscal year 2016
 > 10 places (3 boat shows were canceled in Kyusyu)
 > Visitors 24,000 people



Ref 6



June 2017 in Toyosu



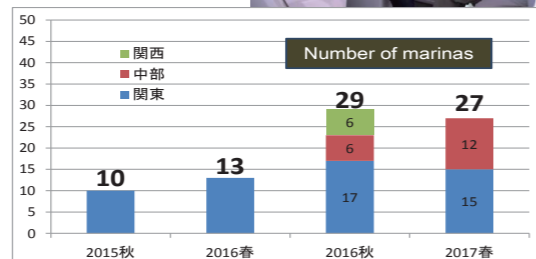
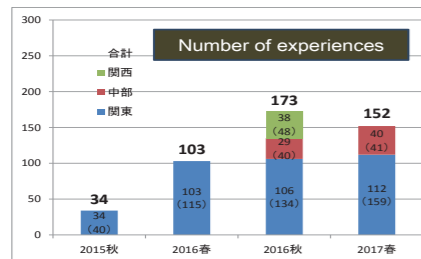
Ref 5 Rental boat Experience Week



We started this event in 2015 to create opportunities to experience boat driving with ease for less driving experience licensee. We aim for area expansion.

Nov. 2015 Start this event in Kanto area
 Apr. 2016 Kanto area
 Nov. 2016 Kanto area and expanded to Chubu and Kansai area
 Apr. 2017 15(Sat) ~ 23(Sun)April (Kanto and Chubu)

Autumn 2017
 (plan) 28 Oct. (Sun) ~ 5 Nov. (Sun)
 Kanto and Chubu area
 Kansai and Cyugoku(under consideration)



10 year vision





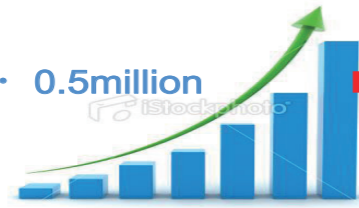
Enjoy marine leisure willingly with family



TARGET : After 10 years **“DOUBLE”**

Number of new licensee · · 50thousand → 100thousand

Number of Participants · · 0.5million → 1million/year



- Clarification of numerical target
- Creation of new demand

Create jobs by marine industry



3 aspects of marine industry

1st: Manufacturing

2nd: Sales

3rd: After service

Jobs of marine industry



Create jobs by marine industry



1st : Manufacturing

FRP BOAT

Make boats and install engines by engine manufactures.
about 100 workers, several naval architects and engineers



YAMAHA
YANMAR

To sell local market by small boat builders.
less than 10 people



MARINE ENGINE

Needs capital investment and technical ,
so motorcycle and/or generator
manufactures have entered.
over 100 workers



Outboard Motors
YAMAHA
SUZUKI
HONDA
TOHATSU



Diesel Engines
YANMAR



Create jobs by marine industry



2nd : Sales

Marine Shop and Marina : 300 shops
1 ~ 5 sales staff per company

New boats : 1,900 boats per year
length 3m and more

Used boats : 10,000 boats per year

Outboard Motors : 16,000 units per year

Safety equipment

sell legal safety equipment with new boats



Create jobs by marine industry



3rd : After service

Marine Shop and Marina : 300 shops
1 ~ 5 service person per company

Periodical Inspection and Maintenance
(Every 6 years and Intermediate Inspection)

Repair, Insurance



	less than 3m	3m ~ 5m	5m ~ 7m	7m ~ 10m	10m ~ 15m	15m ~ 20m	over 20m	TOTAL
PWC	55,456	7,039						62,495
Motor Boats	10,740	39,095	85,740	26,803	5,092	66		167,536
Sailing Yacht	1	208	1,349	7,286	1,146	10		10,000

Inspected boats by JCI

Create jobs by marina industry



3 aspects of marina's contribution to the local economy.

1st: Economic contribution at the time of marina construction

2nd: Economic contribution at the time of marina operation.

3rd: Area economy contribution with a focus on marina.

- Marina event
- Area merit brought by marina
- Marina complex

Create jobs by marina industry



1st :

Economic contribution at the time of marina construction
(Contribution to the local civil engineering & construction industry)

Maintenance hangar

Boat yard pavement

Break water



Parking lot

Club house

Gas station

Crane

Pontoon & piles

Create jobs by marina industry

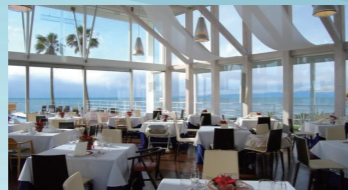


2nd :
Economic contribution at the time of marina operation



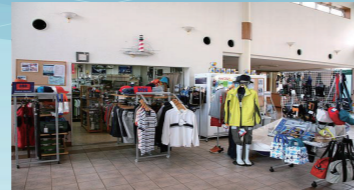
Local employment of Marina operation staff

- *harbor front
- *moving & lifting staff
- *service & rescue staff
- *school instructor, for sailing, fishing



Restaurant

- *local staff employment
- *purchasing local food ingredient .



Souvenir shop

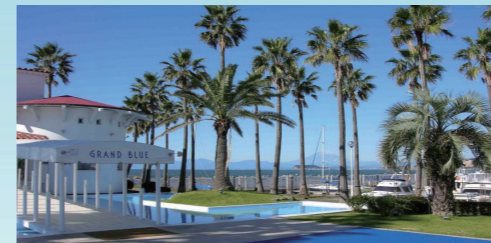
- *Sales of marine-wear & local specialties for visitors contribute to regional economy.

Create jobs by marina industry



3rd-2 :
Area economy contribution --- Area merit brought by marina

Zushi-marina



- Marina changes area atmosphere from simple port to resort.
- *Marina entertain visitors with beautiful scenery and help to promote local tourism.

Nio-marina



- Marina increase the value of surrounding area.
- *In Nio-Marina, back wasteland changed to residential area .

Create jobs by marina industry



3rd-1 :
Area economy contribution --- Marina event
(Marina events gather people from neighboring cities and lead to local business increase.)

Local Boat Show



Fishing tournament



Sailing yacht race



Marine school



Create jobs by marina industry



3rd-3 :
Area economy contribution --- marina complex

Through collaboration with other facilities, marina attracts a large number of people and generates great economic effect in the area.

Yokohama Bayside Marina



Used to be lumberyard



Outlet shopping mall





Create jobs by marina industry



3rd-3 :

Area economy contribution --- marina complex

Through collaboration with other facilities, marina attracts a large number of people and generates great economic effect in the area.

Marinoa



Promoting regional sightseeing as a resort

Shin-moji marina



Very popular for local Bride & Groom



160 stations right now

What are Sea Stations?

Somewhere anyone may visit in order to relax at any time while experiencing peace-of-mind. Each Sea Station offers ingenuity that enhances the myriad attractions of the sea. Commencing with boat cruises, fishing and marine sports opportunities; with seafood, fresh fish markets, hot springs, restaurants and hotels, each Sea Station offers the unique qualities of it surrounding region without reservation.



Otaru in hokkaido



Yumenoshima in kanto



Shin nishinomiya in kansai



Huis Ten Bosch in kyushu

Suggestion to Korea marine industry



Development of seaside area for the general public

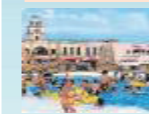


Enjoy It!

Japan possesses one of the longest coastlines in the world. Its numerous seaside locations offer an extensive canvas for the enjoyment of visitors.

Experience It!

Utilize the knowledge of reliable instructors and the warmth of cheerful friends. Start your search here for memorable seaside experiences.



Beaches, Pools



Rental Boat



Cruises



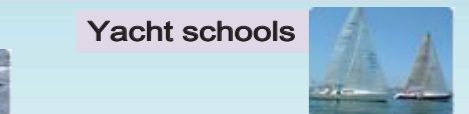
Cruises



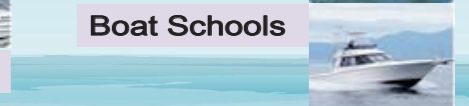
Fishing



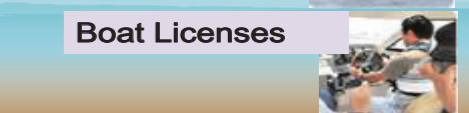
Marine Sports



Yacht schools



Boat Schools



Boat Licenses



Savor It!

Written Japanese contains numerous kanji characters that describe fish species. This attests to the fact that the nation's waters offer a virtual cornucopia of fresh delicacies.



Sea's Bounty



Fresh Markets



Restaurants

Breathe It!

The open sea, the surf, the sea breeze, the salty air, and the sea's bounty. All these facets combine to relax the five physical senses.



Hot Springs



Accommodations



Multipurpose Facilities



Thank you for your attention !



Sea Stations

<http://www.umi-eki.jp/en/>

Japan Marine Industry Association

<http://www.marine-jbia.or.jp/>

Boating Japan

<http://www.boating-japan.jp/>



Development Plan for Korea Marine Leisure Tourism Industry

Speaker Cheol Woo Kim

Department of Marine Leisure Tourism, Youngsan University

Professional Experience

- MOE CK-1 Marine Sports Leisure Workforce Development
Head of CK-1 Project
Busan, Republic of Korea
Dec. 2014- Present
- Youngsan University
Head of Department of Marine Leisure Tourism
Head of College of Physical Education
Busan, Republic of Korea
Mar. 2015- Feb 2017
Sep. 2006- Feb 2010
- Sungsim College of Foreign Languages
Professor in charge of Major in Leisure Tourism
Busan, Republic of Korea
Mar. 2000- Feb 2004
- Busan Fire Safety Headquarters Water Lifesaving education
Instructor
Busan, Republic of Korea
Jun. 2002- Dec 2003
- Busan Metropolitan Police Agency Water Lifesaving education
Instructor
Busan, Republic of Korea
Jun. 1996- Dec 2003
- Korean Red Cross Water Lifesaving Legislation
Instructor
Busan, Republic of Korea
Jun. 1990- Present

Education

- KEIMYUNG University
Ph. D. in Business Administration (Tourism Management)
Daegu, Republic of Korea
Feb 2005
- DONG-A University
MBA (Tourism Management)
Busan, Republic of Korea
Feb 1999
- DONG-A University
Bachelor's degree in Physical Education
Busan, Republic of Korea
Feb 1992

Awards

- President's Certificate of Merit, Korean Red Cross Marine (Water) Safety
Oct. 27 1998; Oct. 27 2003
- Chairman's Certificate of Merit, Korean Red Cross Busan Branch Marine (Water) Safety
Aug. 17 1996

Development plan for Korean Marine Leisure Tourism Industry

YsU Youngsan University



Department of Marine Leisure Tourism
Prof. Cheol-Woo Kim

1. Water Resources! What does the ocean mean to us?

Water Resources(ground water + seawater):
Ocean/Rivers(river, stream, brook)/lake /valley etc.

Korean coast line(14,962km) + Stream(29,840km)

How do we view the ocean?

- ▷ Past -> income source / moving route / survival defense line...
- ▷ Now -> A space for more active and various economic activities (income source/moving route)
 - > Psychological survival defense line(danger, safety, survival swimming)
 - > Passive leisure activity => conversion to a space for active leisure experience activity

1. Water Resources! What does the ocean mean to us?

Water Resources! How to enjoy the ocean?

By the beach On the sea Under the sea On the mountain/hill In the sky

Recent marine leisure activities of Koreans?

- ▷ Bathing(sunbathing/airbathing/coldbathing) / Sandbathing / Swimming in the sea / Ocean landscape viewing / Trekking coastal trail
- ▷ Cruise / Yacht / Boat / Personal water craft / Submarine tour / Parasailing / Water ski / Water sleigh
- ▷ Sailing Yacht / Surfing / Kite surfing / Wind Surfing / Canu / Kayak / SUP / Rafting / Dragon boat / Fishing / Lifesaving
- ▷ Snorkeling / Scuba etc.



2. Domestic Marine Leisure Sports Trend

National Sports for All(Korea Sports Index, 2014)

- ▷ Walking(38.7%), Mountain climbing(22.8%), Health(11.8%), Soccer(8.7%), Bicycling(7.1%), Badminton(6.7%), Swimming(6.2%) etc.

▷ **Marine Leisure Sports(0.1%)**

Marine Leisure Sports club & Members(Korea Sports Index, 2015)

- ▷ Fishing(621/9,463 persons), Skin scuba(311/9,204 persons), Wind surfing(174/9,447 persons), Water ski(128/6,146 persons), Canu(115/5,254 persons), Yacht(85/1,953 persons) etc.

@ **Swimming club & members(1,842 units, 106,976 persons)**

@ **Public and private swimming pool in total 1,104 / In 2014, 925 units / In 2012, 867 units**



3. Future Tourism Trend

UNWTO : In 2020, 6 out of 10 Tourism trends will be relevant to marine leisure tourism.

- ▷ Adventure · Beach · Ecology · Rural/fishing village · Cruise · Amusement park · International meeting · Culture · City tour!

Estimated at 50% is the Marine tourism ratio out of World tourism market.

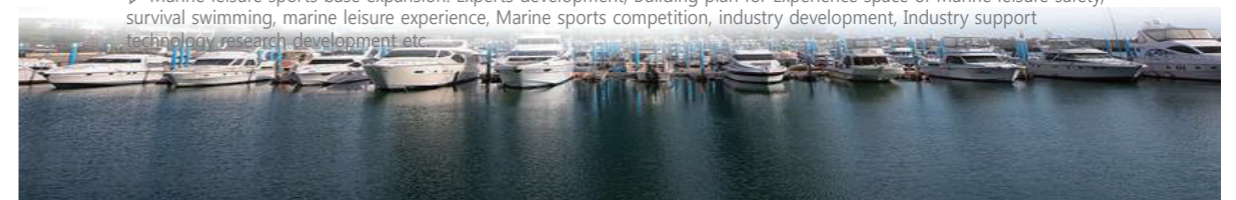
Global Tourism Market Status/Outlook(UNWTO)			Domestic Tourism Market Status /Outlook(KMI)	
Item	2012	2030	Domestic Tourists	Recovering since 2011 / 2023 770 days
Tourism Population	1bn persons	1.8bn persons		360m days(2012) → 380m days(2013)
Market size	USD 1.2tn	USD 2.1tn	Marine Tourism	2023 500m days(65%) / YoY growth 8%
Asia pacific tourists	31%(310m persons)	33%(590m persons)		180m days(2012/50%) → 500m days(2023)



4. What have we done to develop marine leisure tourism industry?

Legislation(Law-making) / Revision – To promote Industry development / Deregulation etc.

- Feb. 9 2000 Water leisure safety law implementation before / after
- Dec. 9 2009 Marina Harbor Act
- May 30 2017 Underwater Leisure Act implementation
- Tourism industry acts: Fisheries Act(Paid Fishing Industry), Shipping Act(Maritime Passenger Transportation Business), Excursion Ship and Ferry Business Act etc.
- Development location & Territorial Sea Act: Public Waters Management Act, River Act, Coastal Management Act, Prevention of Marine Pollution Act, Harbor Act, Fishery Harbors Act and Wetlands Conservation Act etc.
- Maritime Safety Management Act: Maritime Traffic Safety Act, Ship Act, Seafarers Act, Ship Safety Act, Public Order in Open Ports Act, Fishing Vessel Act
- Government / Coastal cities(Regional local governments)
 - ▷ Legislative deregulation & policy development, marine leisure infrastructure, Marina industry development, Underwater leisure industry activation
 - ▷ Marine leisure sports base expansion: Experts development, Building plan for Experience space of Marine leisure safety, survival swimming, marine leisure experience, Marine sports competition, industry development, Industry support technology research development etc.





5. What should we to further promote Marine leisure tourism industry?

We : Relevant government agencies, coastal city local government, experts and stakeholders

A. Coastal city citizens to change awareness of sea and water resources!

- 1) Water-friendly Living culture creation & constant effort to change awareness of citizens!
 - ⇒ Danger/Survival ≠ Beauty/Joy of nature= Space of Sharing/Communication
- 2) **Constant experience of Marine leisure sports to develop potential demand of future industry!**
 - ⇒ Members mid/long-term base expansion policy by expansion of Marine leisure sports club & Members mid/long-term(0.1% << 6.2% << 10%)
 - ⇒ Youth Marine leisure sports afterschool club activity & non-curricular education support plan arrangement
 - ⇒ Bathing(swimming) << Non-powered Marine leisure << Powered Marine leisure << active/various Marine leisure behavior change



5. What should we to further promote Marine leisure tourism industry?

We : Relevant government agencies, coastal city local government, experts and stakeholders

B. Korean Peninsula! Clear plan to develop the coastal cities, rich in water resources

- 1) Clear reflection of will of coastal city local governments & relevant government agencies to design policy & development plan
 - ⇒ Integrated and seamless communication between agencies and ministries to promote expertise, reasonable policy decision making
 - ⇒ Advisory committee setup & expanded usage in quality and quantity considering expertise advancement
 - ⇒ Policy and development plan for constant provision of professional idea analysis & implementation opportunity
- 2) Detailed preparation for future considering environmental-economic value and demand tendency of natural resources
 - ⇒ Infrastructure setup/Deregulation/Support by policy ≠ demand creation / industry development
 - ⇒ Why the companies aren't willing to invest:
Legislative regulation issue / Lack of business justification / unpredictable demand / Difficulty in maintaining the service quality & quantity etc.



5. What should we to further promote Marine leisure tourism industry?

We : Relevant government agencies, coastal city local government, experts and stakeholders

A. Coastal city citizens to change awareness of sea and water resources!

- 3) By generation, setup a virtuous cycle system step-by-step to create future demand of Marine leisure tourism industry
 - Mandatory swimming(water safety) education ⇒ Constant experience of Marine leisure sports activity ⇒ Marine leisure tourism industry demand
- 4) Elementary education **regular curriculum swimming education / Adding Water safety education to mandatory curriculum!**
 - ⇒ **Survival swimming Mandatory experience!** ≠ Water safety/ Marine leisure tourism industry development
 - ⇒ Enhancement of health & water safety activity and survival capacity by systematic and step-by-step swimming(Water safety)education of certain level
 - ⇒ Life Saving or self-rescue capacity to switch to event & competition, regular sports for all

⇒ International cases of mandatory education

Germany	Elementary/middle school Swimming education /Grade 2-3 36hrs /To appropriate rescue exam	Sweden	At age 11 and up, Swimming over 200m
U.K.	Elementary (Physical education) Swimming/ Swimming over 25m	France	Swimming over 15m

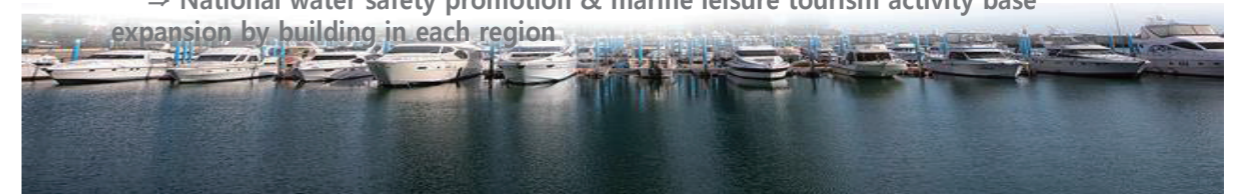
5. What should we to further promote Marine leisure tourism industry?

We : Relevant government agencies, coastal city local government, experts and stakeholders

B. Korean Peninsula! Clear plan to develop the coastal cities, rich in water resources

3) **Building Water Safety Education Center to promote Marine leisure tourism industry development and National Water safety.**

- ⇒ Lacking national water safety education center in Korean Peninsula!
- ⇒ **In 2018, plan to begin Ansan Water Safety Experience Space building project? : Marine safety centered facility design / ground water safety?**
- ⇒ **Sustainable** space needed for more systemized and active **Water(ground water + seawater)safety education and experience**
- ⇒ Space needed to give step-by-step knowledge and experience considering the special features of water resources & water safety accident
- ⇒ National water safety promotion & marine leisure tourism activity base expansion by building in each region





5. What should **we** to **further** promote Marine leisure tourism industry?

We : Relevant government agencies, coastal city local government, experts and stakeholders

B. Korean Peninsula! Clear plan to develop the coastal cities, rich in water resources

4) Water leisure in both ground water and seawater & safety management system(control tower) consolidation & expertise enhancement, DB management advancement

5) Policy and special act legislation, establishment of strategy needed by considering the resource situation of coastal city local governments

Thank you ^^



Citizens of coastal city! We need to make a difference!
Policy and city development strategy! Expertise as well!

대한민국 해양레저관광산업 발전 방안

YsU 영산대학교



해양레저관광학과 김철우

1. 수자원! 바다는 우리에게 어떤 공간인가?

수자원(내수+해수) : 바다 / 하천(강, 천, 시내) / 호수 / 계곡 등

우리나라 해안선(14,962km) + 하천(29,840km)

우리에게 바다란 어떻게 인식되어 있나?

▷ 과거 -> 생계수단 / 이동경로 / 생존방어선...

▷ 현재 -> 좀 더 적극적이고 다양한 경제활동 공간(생계수단/이동경로)

-> 심리적 생존방어선(위험, 안전, 생존수영)

-> 소극적 여가활동 => 적극적 레저체험 활동 공간으로의 변환기



1. 수자원! 바다는 우리에게 어떤 공간인가?

수자원! 바다를 즐기는 방법은?

해안가에서 바다 위에서 바다 속에서 산/언덕 위에서 하늘에서도

한국인의 최근 해양레저활동은?

- ▷ 해수욕(일광욕/공기욕/냉수욕) / 모래찜질 / 바다수영 / 바다경관감상 / 해안길 트레킹
- ▷ 크루즈 / 유람선 / 요트 / 보트 / 수상오토바이 / 관광잠수정 / 패러세일링 / 수상스키 / 워터슬레이
- ▷ 세일링요트 / 서핑 / 카이트서핑 / 윈드서핑 / 카누 / 카약 / SUP / 레프팅 / 드레곤보트 / 낚시 / 라이프세이빙
- ▷ 스노클링 / 스쿠버 등



2. 국내 해양레저스포츠 동향

국민 생활스포츠 참가종목(한국체육지표, 2014년)

▷ 걷기(38.7%), 등산(22.8%), 헬스(11.8%), 축구(8.7%), 자전거(7.1%), 배드민턴(6.7%), 수영(6.2%) 등

▷ 해양레저스포츠(0.1%)

해양레저스포츠 클럽 및 동호인(한국체육지표, 2015년)

▷ 낚시(621개/9,463명), 스킨스쿠버(311개/9,204명), 윈드서핑(174개/9,447명), 수상스키(128개/6,146명), 카누(115개/5,254명), 요트(85개/1,953명) 등

@ 수영클럽 및 동호인(1,842개, 106,976명)

@ 공공 및 민간 수영장 총 1,104개 / 2014년 925개 / 2012년 867개



3. 미래의 관광 트렌드

세계관광기구(UNWTO) : 2020년 10대 관광 트렌드 중 6개 분야가 해양레저관광과 연관

▷ 모험 · 해변 · 생태 · 농어촌 · 크루즈 · 테마파크 · 국제회의 · 문화 · 도시 관광!

세계관광시장 중 해양관광 비중 약 50% 추산

세계 관광 시장 현황/전망(UNWTO)			국내 관광 시장 현황/전망(KMI)	
구 분	2012년	2030년	국내여행 이동총량	2011년 이후 회복세 / 2023년 7.7억일
관광인구	10억명	18억명		3.6억일('12년) → 3.8억일('13년)
시장규모	1조2천억 달러	2조1천억 달러	해양관광	2023년 5억일(65%) / 연 8% 성장
아시아 태평양 관광객	31%(3억1천만명)	33%(5억9천만명)		1.8억일('12년/50%) → 5억일('23년)



4. 해양레저관광산업 발전을 위해 우리는 어떤 노력을 해왔나?

입법(법 제정) / 개정 - 산업발전 촉진 / 규제완화 등

- 2000년 2월 9일 수상레저안전법 시행 이전 / 이후
- 2009년 12월 9일 마리나항만법
- 2017년 5월 30일 수중레저법 시행
- 관광사업관련법 : 수상업법(유료낚시터업), 해운법(해상여객운송사업), 유선 및 도선사업법 등
- 개발입지 및 해역이용 관련법 : 공유수면관리법, 하천법, 연안관리법, 해양오염방지법, 항만법, 어항법 및 습지보전법 등
- 해양안전관리법 : 해상교통 안전법, 선박법, 선원법, 선박안전법, 개항질서법, 낚시어선업법

정부 / 연안도시(지방자치단체)

- ▷ 법적 규제완화 및 정책개발, 해양레저 인프라 확충, 마리나 산업 육성, 수중레저산업 활성화
- ▷ 해양레포츠 저변확대 : 전문가육성, 해양레저안전체험관 건립 추진, 생존수영, 해양레저체험, 해양스포츠대회, 산업육성, 산업지원 기술연구 개발 등



5. 해양레저관광산업 발전을 위해 우리는 어떤 노력을 더 해야 하나?

우리 : 관련 정부기관 및 연안도시 지자체, 전문가, 이해관계자

가. 연안도시 시민의 바다와 수자원에 대한 인식과 의식 변화가 우선!

1) 친수 생활문화공간화 및 시민의식 변화 노력 지속!

⇒ 위험/생존 ≠ 자연의 아름다움/즐거움 = 공유/소통의 공간

2) 해양레저스포츠의 지속적 경험활동을 통한 미래산업 잠재수요 개발!

⇒ 해양레저스포츠 클럽 및 동호인 확산을 통한 증장기적 저변 확대 정책화(0.1% << 6.2% << 10%)

⇒ 유소년 해양레저스포츠 방과 후 클럽활동 및 비교과교육 지원 방안 마련

⇒ 해수욕(수영) << 무동력 해양레저 << 동력 해양레저 << 적극적/다양한 해양레저 행태 변화



5. 해양레저관광산업 발전을 위해 우리는 어떤 노력을 더 해야 하나?

우리 : 관련 정부기관 및 연안도시 지자체, 전문가, 이해관계자

나. 3면이 바다인 대한민국! 수상자원이 풍부한 연안도시의 발전을 위한 의지를 명확히!

1) 연안도시 지자체 및 관련 정부기관의 의지를 정책 및 개발 계획에 명확히 반영!

⇒ 기관 및 부처 간 융·복합적 소통을 통한 전문성 제고와 합리적 정책 결정이 우선

⇒ 전문성의 고도화를 고려한 자문위원회 구축 및 활용의 양·질적 다각화

⇒ 정책 및 개발 계획 등 전문가 아이디어에 대한 심층분석 및 실행 기회를 지속 제공

2) 자연자원의 환경적·경제적 가치와 수요 경향을 고려한 세밀한 미래 대비

⇒ 인프라 구축/규제완화/정책적 지원 ≠ 수요 창출 / 산업 발전

⇒ 기업이 적극적으로 투자를 하지 않은 이유는

법제적 규제문제 / 사업타당성 결여 / 수요 불투명 / 양·질적 서비스 유지 어려움 등



5. 해양레저관광산업 발전을 위해 우리는 어떤 노력을 더 해야 하나?

우리 : 관련 정부기관 및 연안도시 지자체, 전문가, 이해관계자

가. 연안도시 시민의 바다와 수자원에 대한 인식과 의식 변화가 우선!

3) 세대별 단계적으로 해양레저관광산업의 미래수요를 창출하는 선순환적 시스템 구축

의무 수영(수상안전)교육 ⇒ 해양레저스포츠활동 지속 경험 ⇒ 해양레저관광 산업 수요

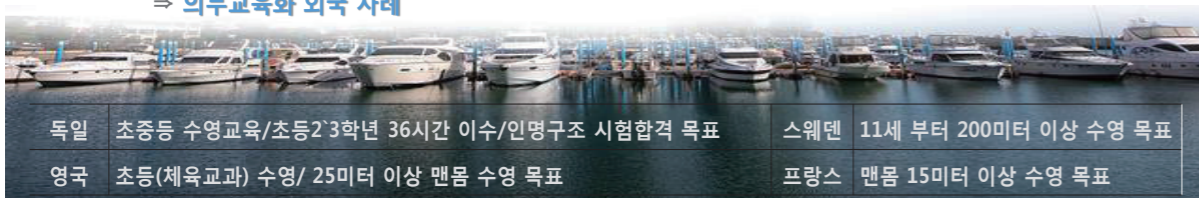
4) 초등교육 정규교과 수영교육 / 수상안전교육 의무교육화!

⇒ 생존수영 의무체험화! ≠ 수상안전 / 해양레저관광산업 발전

⇒ 단계별 일정 수준의 수영(수상안전)교육 체계를 통해 건강 및 수상안전활동, 생존역량 강화

⇒ Life Saving or self-rescue 역량 배양을 행사 및 대회, 정기적 생활스포츠활동으로의 전환

⇒ 의무교육화 외국 사례



독일	초·중등 수영교육/초등2·3학년 36시간 이수/인명구조 시험합격 목표	스웨덴	11세 부터 200미터 이상 수영 목표
영국	초등(체육교과) 수영/ 25미터 이상 맨몸 수영 목표	프랑스	맨몸 15미터 이상 수영 목표

5. 해양레저관광산업 발전을 위해 우리는 어떤 노력을 더 해야 하나?

우리 : 관련 정부기관 및 연안도시 지자체, 전문가, 이해관계자

나. 3면이 바다인 대한민국! 수상자원이 풍부한 연안도시의 발전을 위한 의지를 명확히!

3) 해양레저관광산업 발전을 견인하고 국민의 수상안전을 선도하는 수상안전교육관 건립!

⇒ 국민의 수상안전을 선도하는 교육관 하나 없는 반도국가 대한민국!

⇒ 2018년 착공 예정인 안산시 해양안전 체험관 건립? : 해양안전 중심 시설 설계 / 내수면 안전?

⇒ 보다 체계적이고 적극적인 수상(내수면+해수면)안전교육과 경험을 지속할 수 있는 공간 필요

⇒ 수상자원 및 수상안전사고 특성을 고려한 지식과 경험을 단계별로 교육하는 공간 필요

⇒ 권역별 건립을 통해 국민의 수상안전 선도 및 해양레저관광 활동 저변확산 기회



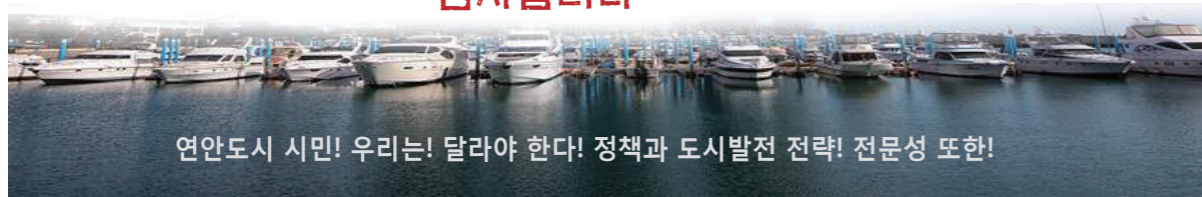
5. 해양레저관광산업 발전을 위해 **우리는 어떤 노력을 더 해야 하나?**

우리 : 관련 정부기관 및 연안도시 지자체, 전문가, 이해관계자

나. 3면이 바다인 대한민국! 수상자원이 풍부한 연안도시의 발전을 위한 의지를 명확히!

- 4) 내수면과 해수면의 수상레저 및 안전 관리체계(컨트롤타워) 일원화 및 전문성 강화, DB관리 고도화
- 5) 연안도시 지방자치단체의 자원적 특성을 고려한 정책 및 특별법 제정, 전략수립 등 필요

감사합니다 ^^



연안도시 시민! 우리는! 달라야 한다! 정책과 도시발전 전략! 전문성 또한!

KIMA 2017
KOREA INTERNATIONAL MARINE LEISURE WEEK
WEEK



KIMA 2017

KOREA INTERNATIONAL MARINE LEISURE WEEK

WEEK

Grand Opening & 제5회 KIMA Awards

일시 : 09.20(수) 14:00~15:00

장소 : 해운대 누리마루 APEC 하우스

국제 컨퍼런스

일시 : 09.20(수) 15:00~17:00

장소 : 해운대 누리마루 APEC 하우스

주제 : 아시아 해양레저관광산업 발전과 일자리 창출 성과

해양레저 체험페스티벌 - 요트맛보기 '요맛'

일시 : 09.20(수) ~ 09.26(화)

장소 : 수영만 요트경기장, 더베이101 요트클럽
삼주 다이아몬드베이

www.kimaweek.org

제5회 대한민국 국제해양레저위크

2017. 09. 20(수) ~ 09.26(화)

누리마루 APEC 하우스 / 해운대 / 광안리 / 수영만 / 용호만 일대

주제 : 전 세계가 함께 즐기는 대한민국 국제해양레저축제

주최 | 해양수산부 부산광역시 주관 | 한국해양재단트윅크

후원 | 대한세일링연맹 KSPD 한국관광공사 MBC 부산항만공사 BPAV BUSAN International Film Festival bto BUSAN

특별후원 | 스타자동차(주) (주)광진플루