

Appendix 1 General marine and coastal recreation



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Appendix 1: General marine and coastal recreation

Table A1.1: Summary of sample confidence levels

Responses	Spatial data	Questionnaire data
<30	Very low sample – interpret spatial data with great care	Very low sample – do not analyse questionnaire results
30 – 60	Low sample –interpret spatial data with care	Low sample –analyse questionnaire results with caution
60 -100	Medium sample – good spatial data	Medium sample – analyse questionnaire results with care
>100	Robust sample	Robust sample

This table summarises the confidence that can be placed in spatial data and questionnaire data as a result of the corresponding sample sizes. This is described in more detail below.

Definition

1. General marine and coastal recreation includes beach games, beach combing, rock pooling, painting, kite flying, sunbathing, naturism, picnicking, yoga, paddling, walking less than 2 miles, general sightseeing, fossil hunting, beach team sports, body boarding, general swimming and snorkelling, coastal cycling, horse riding and dog walking.

Sample sizes

2. The survey collected information on participation in recreation and tourism activities in two ways. Firstly, survey respondents were asked to list all the activities they had undertaken during the previous 12 months, completing a map for each. Secondly, they were asked to identify the one or two activities that they considered most import. They were asked a series of questions relating to their participation in these activities.
3. A total of **1658** people provided spatial information for general marine and coastal recreation, representing around 77% of the total sample. **521** people identified general marine and coastal recreation as one of their most important activities, representing just under a quarter of the total sample. These are good samples meaning that confidence in the analysis of responses is high. This does not mean the data are fully comprehensive, particularly in parts of Scotland where the host population and visitors are relatively low.
4. Around a third of those who participated in general marine and coastal recreation identified it as one of their most important activities.
5. Based on the sample of people who provided spatial information, around 45% of respondents lived within a mile of the Scottish coastline, 19% between one and five miles and 26% more than five miles. The remaining 10% of respondents came from outside Scotland.

Spatial data

6. People completing the survey identified just over 26,000 spatial data points for general marine and coastal recreation. This information has been used to generate a heat map showing the concentration of general marine and coastal recreation activity around the Scottish coast (see **Map A1.1**). It shows concentrations of activity along the east coast, particularly the Firth of Forth and Fife coastline and close to Aberdeen. Other concentrations include the Inner Firth of Clyde and the Ayrshire coastline and specific locations throughout Argyll and the Highlands, including Oban, Tobermory, Ullapool and Iona. This map is available on Marine Scotland’s National Marine Plan Interactive (NMPi) website (<https://marinescotland.atkinsgeospatial.com/nmpi/>).
7. **Figure A1.1** shows the percentage distribution of general marine and coastal recreation activity across Marine Regions. It shows a concentration of activity in the Forth and Tay, Clyde, Argyll and West Highland Marine Regions. This is a pattern very similar to the survey sample as a whole, in part reflecting the large proportion of survey responses and data points (around 50%) that fall into this category.

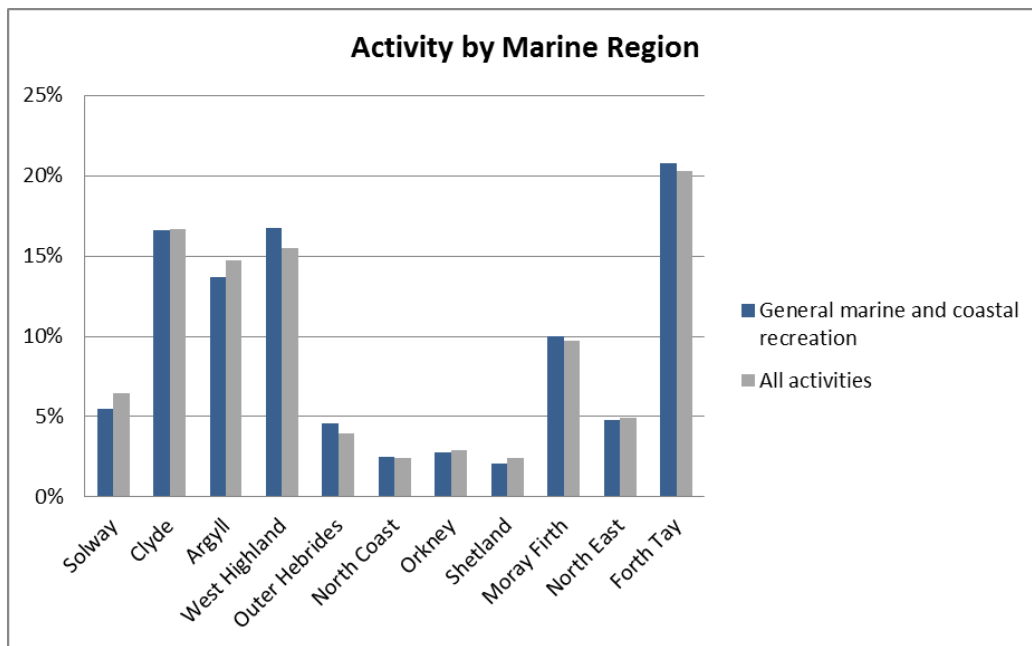
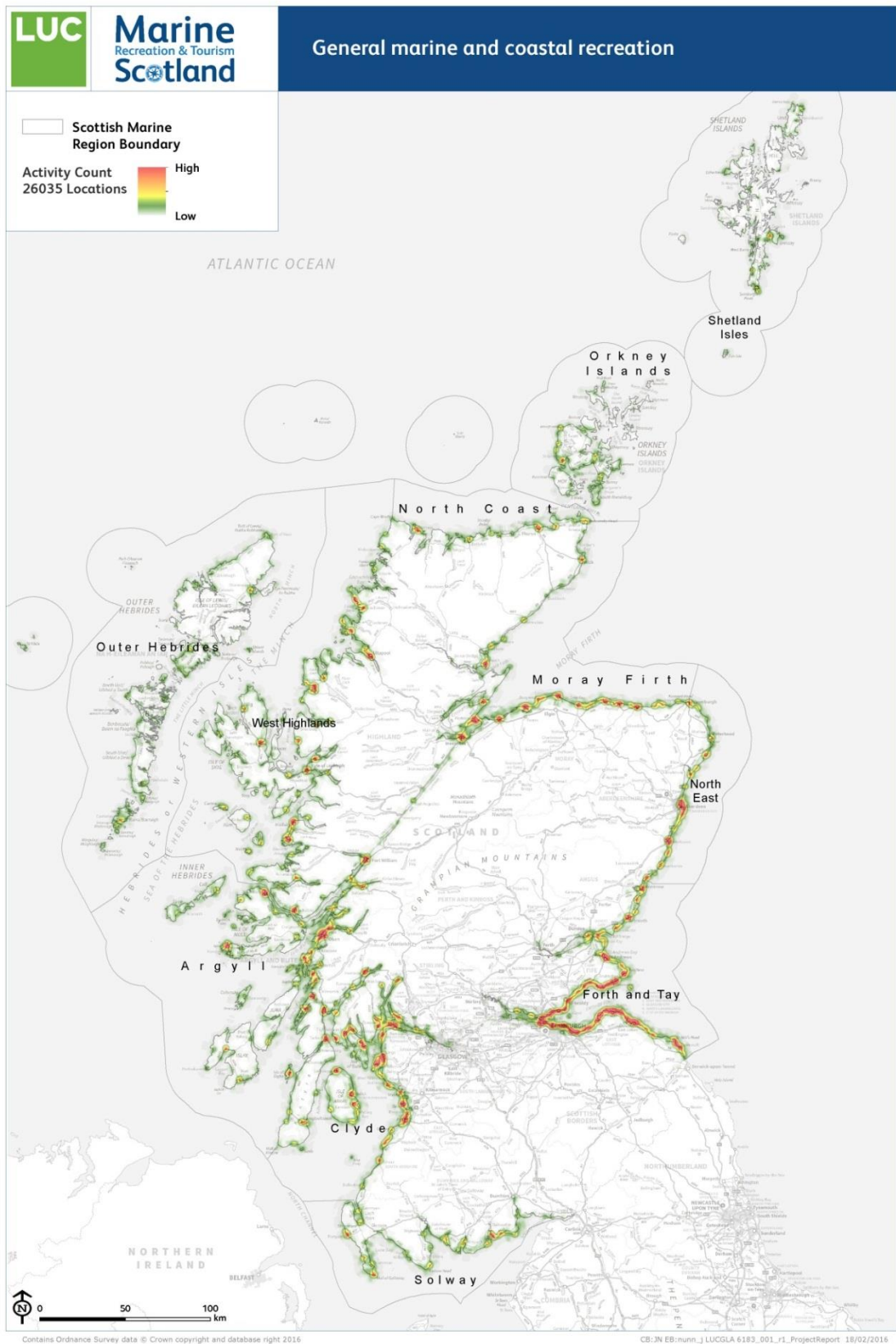


Figure A1.1: Spread of General Marine Recreation activity across Marine Regions (%)



Map A1.1: General marine and coastal recreation (1658 responses)

Trip planning

8. Respondents were asked about the factors influencing their decision on where to go for general marine and coastal recreation, and about the sources of information they used to inform that decision.

Factors influencing decisions on where to go

9. The three most important factors in influencing where people went were attractive scenery, the suitability of their destination for general recreation and the possibility of seeing wildlife. Proximity to people’s homes, recommendations and the presence of historic and cultural heritage features were also important. Accommodation, the presence of cafés, shops, restaurants and other attractions were considered less important.

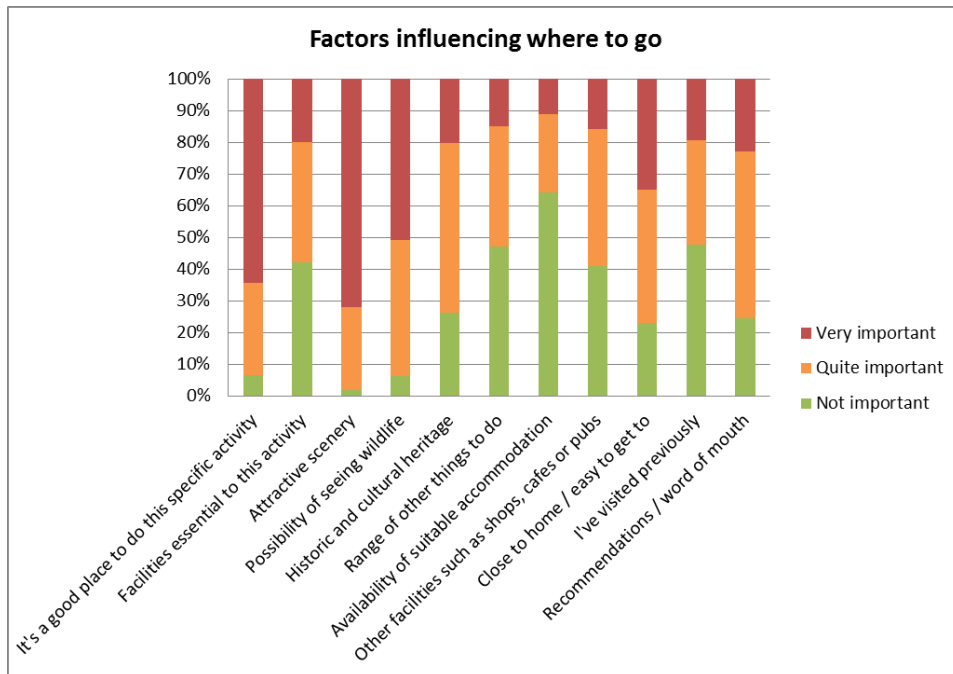


Figure A1.2: General marine recreation - factors influencing where to go

Sources of information

10. People’s own knowledge of the Scottish coastline, together with recommendations from friends and family are the most important sources of information when deciding on where to go. Websites are also important, with guidebooks, magazines and clubs and associations playing a lesser role.

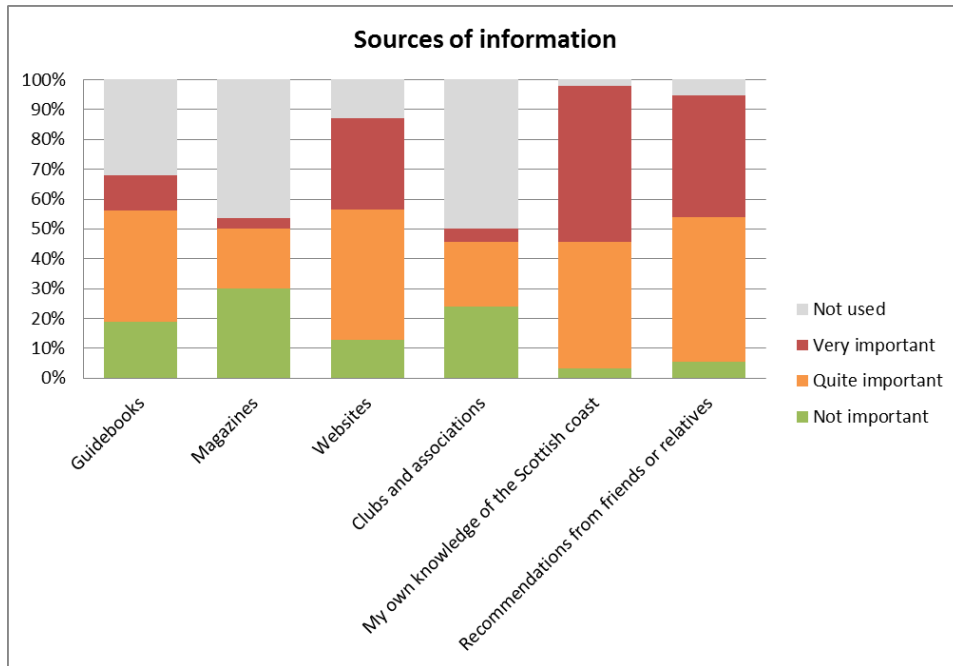


Figure A1.3: General marine recreation – information when deciding where to go

Characteristics of trip to the coast
Transport to start point

- Car is by far the most common mode of transport to the start of people’s visit to the coast, with half of respondents indicating they always travel that way, and a further 45% indicating they sometimes go by car. Over half of people sometimes walk to the coast, reflecting the high proportion of respondents living in coastal locations. Buses, trains, bicycles and ferries were sometimes used by between a quarter and a third of respondents.

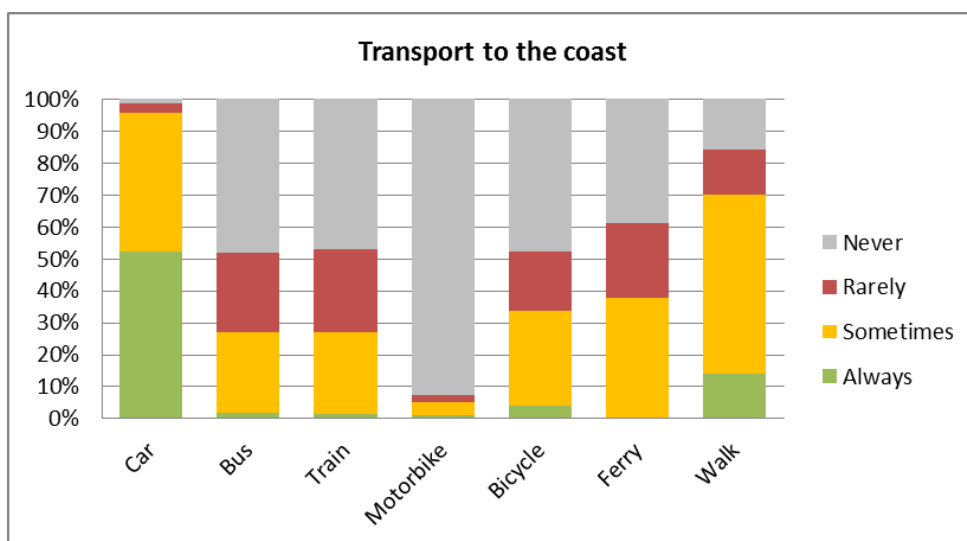


Figure A1.4: General marine recreation – transport to the coast

Monthly profile of activity

12. **Figure A1.5** shows the clear influence of seasonality on the number and frequency of visits to the coast for general recreation. Activity peaks in July with around 40% of respondents undertaking recreation or tourism activity several times a week and over 80% taking part at least twice a month. Comparable proportions for January are less than 15% and less than 50%. Again, the high level of activity, particularly during the summer months, is probably a reflection of the proportion of respondents living close to the coast, and the nature of the survey sample which is likely to over-represent more active participants.

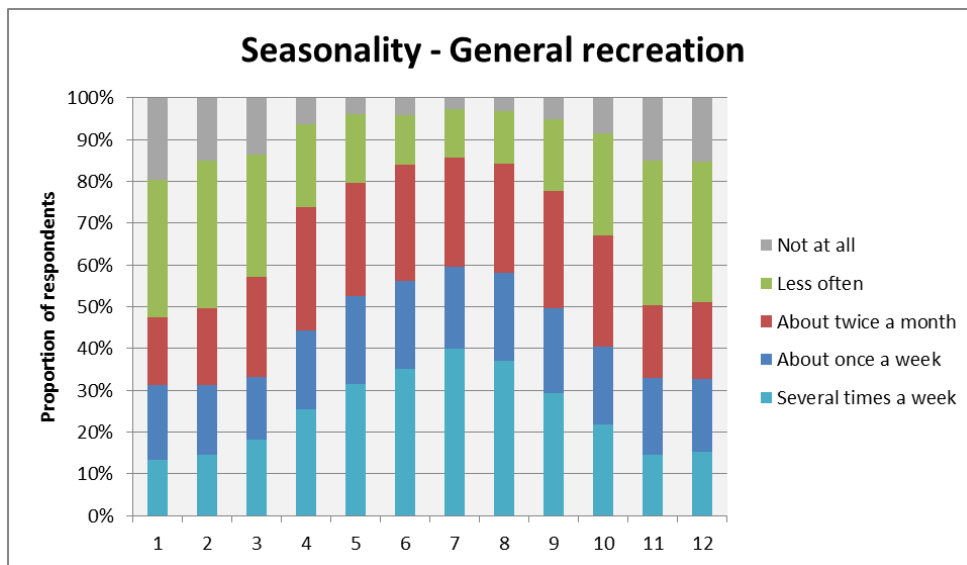


Figure A1.5: General marine recreation – seasonality and frequency of visit

Trip length

13. People undertaking general marine and coastal recreation made an average of around 6 day trips, just over 1 short break and around 0.8 longer breaks per year. Comparison with the whole survey sample indicates a larger number of day trips and smaller number of longer breaks. This is not surprising given the range of activities covered by this category, including shorter walks, bike rides and dog walking, many of which may be undertaken by people living in a coastal location as well as those travelling to specific destinations.

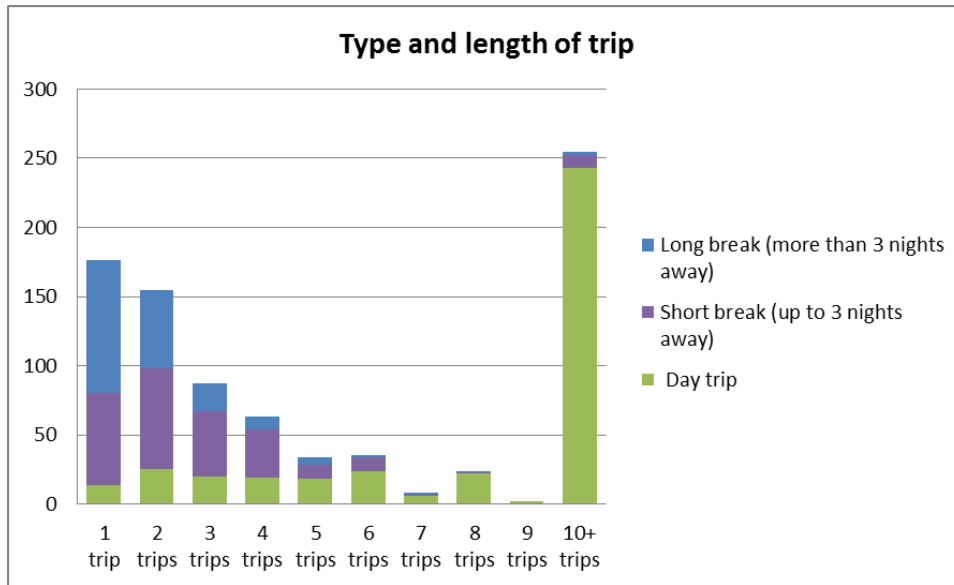


Figure A1.6: General marine recreation – type and length of trip

- The sample of 521 respondents accounts for a minimum of 3000 day trips, 600 short breaks and over 400 longer breaks.

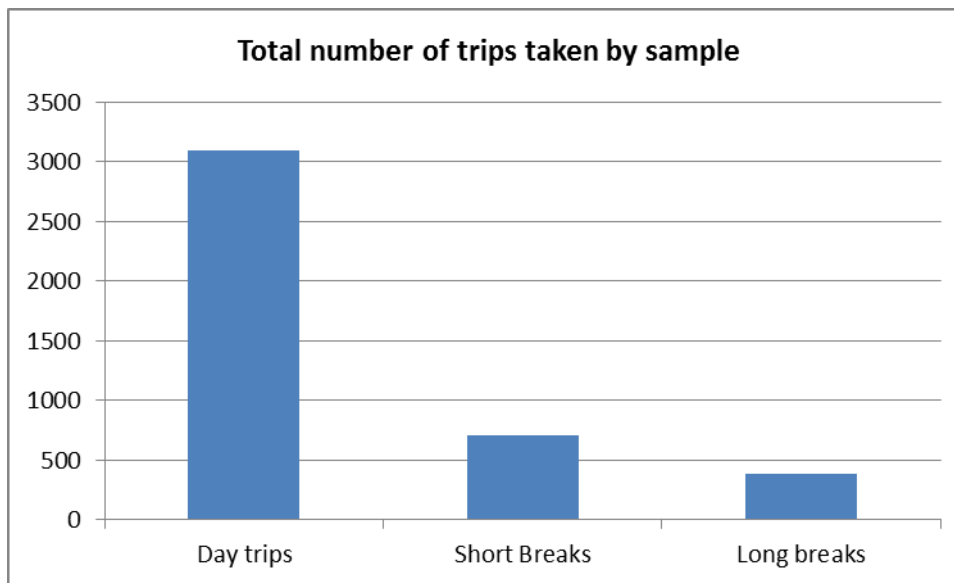


Figure A1.7: General marine recreation – total number of trips taken

Accommodation used

- People taking short or long breaks provided information on the types of accommodation they typically use. Staying with friends and family, camping and self-catering were the most commonly used forms of accommodation, with hotels and bed and breakfast less popular.

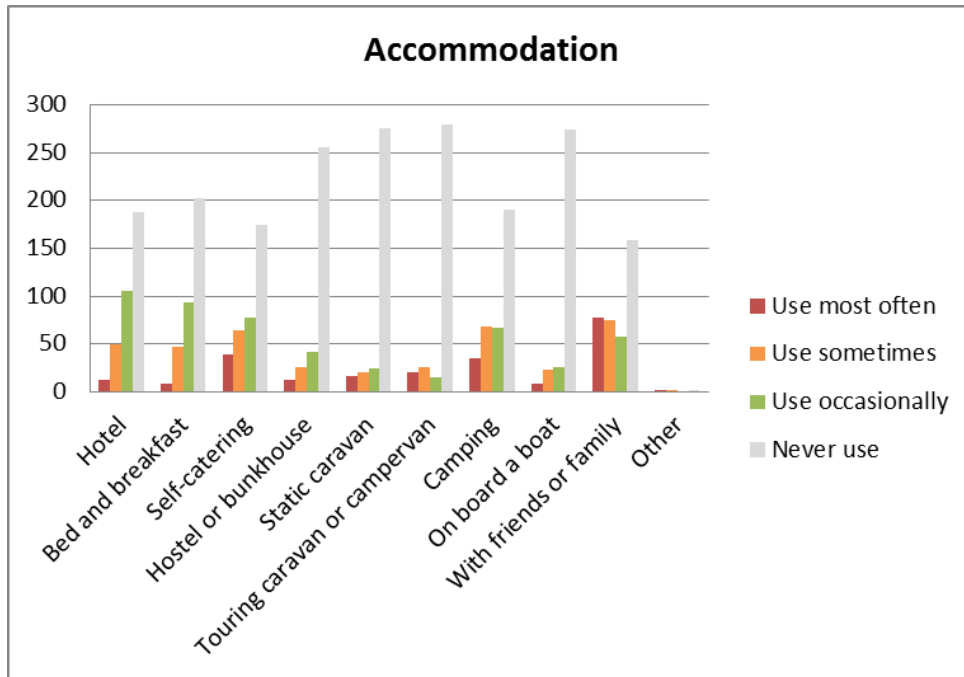


Figure A1.8: General marine recreation – accommodation

Improvements to make trip more enjoyable

- The improvements judged to be most important were parking and access, transport, on-line information, signage and on-site information. Accommodation and visitor facilities were generally considered less in need of improvement.

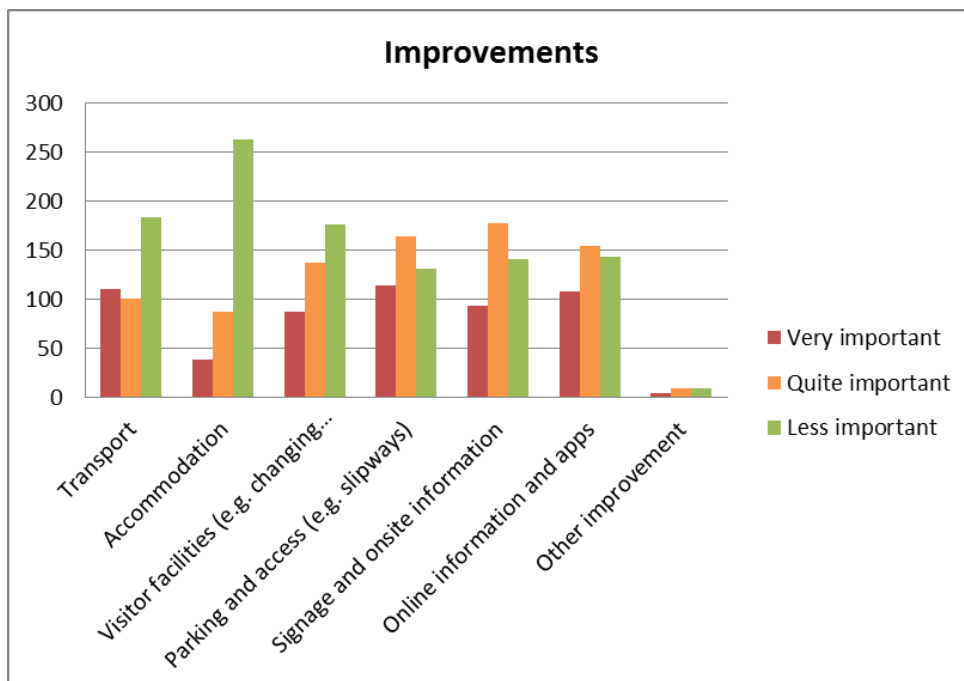


Figure A1.9: General marine recreation – improvements

Party

17. Respondents were asked a number of questions about the people they are normally with when undertaking their chosen recreation or tourism activity.

Who was with you?

18. **Figure A1.10** suggests that, for people selecting general marine recreation as their main activity, there was a fairly even spread across the different types of companion. People were most commonly with friends, followed closely by partner or family, alone or with club members. Not surprisingly, people were least frequently with other members of an organised trip.

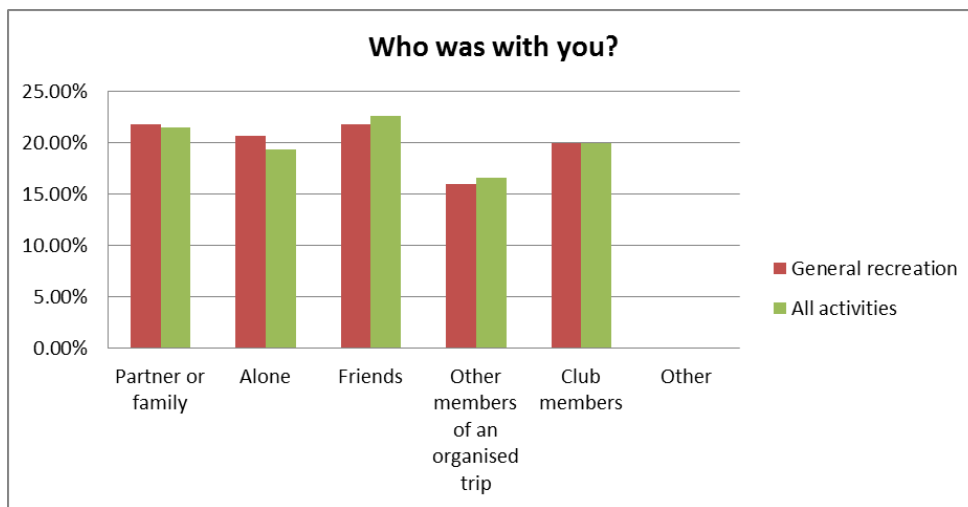


Figure A1.10: General marine recreation – party

Age groups and gender composition of party

19. Respondents were also asked about the age and gender composition of their party²⁸. **Figure A1.11** shows general marine recreation parties tend to be smaller than for the survey sample as a whole. Parties most commonly comprised people in the age groups between 16 and 65, with women slightly outnumbering men.

²⁸ * respondents were asked whether there were 1,2,3,4 or 5 or more people in each age/gender category. For the purposes of analysis, returns of '5 or more' have been taken to be '5'. As a result, the estimate of average party size is likely to be an underestimate.

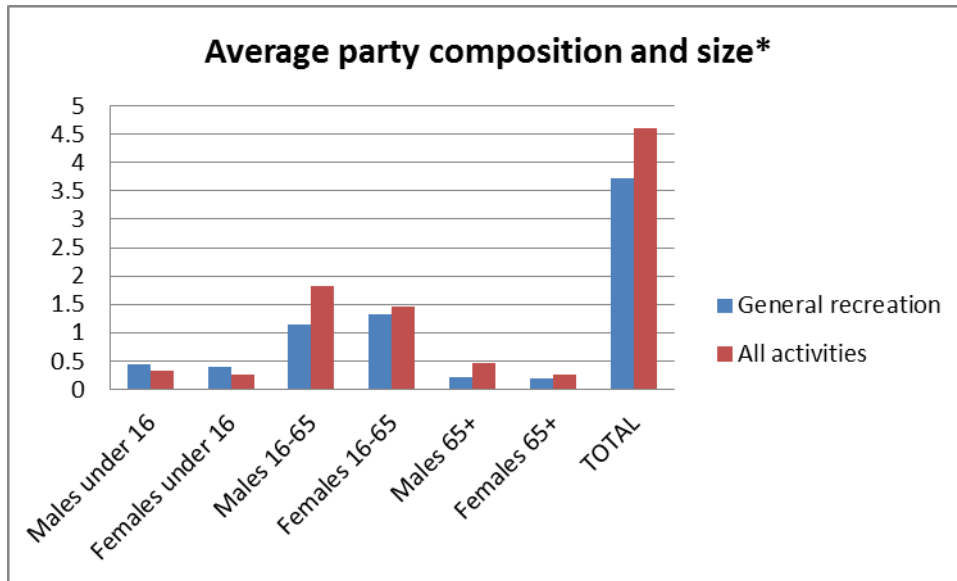


Figure A1.11: General marine recreation – party composition and size

Spending

20. People completing the survey were asked to provide information on how much they spent per day during their last visit to the coast and how much they typically spend each year.

Spend per day during visit by category

21. Analysis excludes 68 respondents who provided no information on their spending, but include the 95 respondents who stated that they spent nothing during their trip.
22. **Table A1.2** shows the maximum, mean and median daily spending against a series of headings. It is evident that the sample included some very high maximum spending figures and it is, therefore, likely that median rather than mean figures provide a more typical picture of spending associated with general marine recreation. This suggests a median spend of around £31 per day during recreation trips to the Scottish coast.
23. Given the nature of activities included in this category, the predominance of day trips and the types of accommodation used by people on short or long breaks, it is not surprising that the average spend amounts were lower than for the whole survey, across all the categories of expenditure.

Table A1. 2: General recreation – max, mean and median spend per trip (£)

	Max (£)	Mean (£)	Median (£)
Petrol/diesel/LPG	300	15	10
Bus/train fares	70	6	0
Car parking	40	3	2
Overnight accommodation	500	43	25
Eating out	400	25	20
Food and groceries	100	13	10
Entrance to local visitor attractions	60	11	10
Mooring or transit fees	100	4	0
Hire of equipment	100	3	0
Maps/guidebooks/leaflets	25	3	0
Gifts/souvenirs	50	6	5
Other	50	6	0
TOTAL	1460	57	31

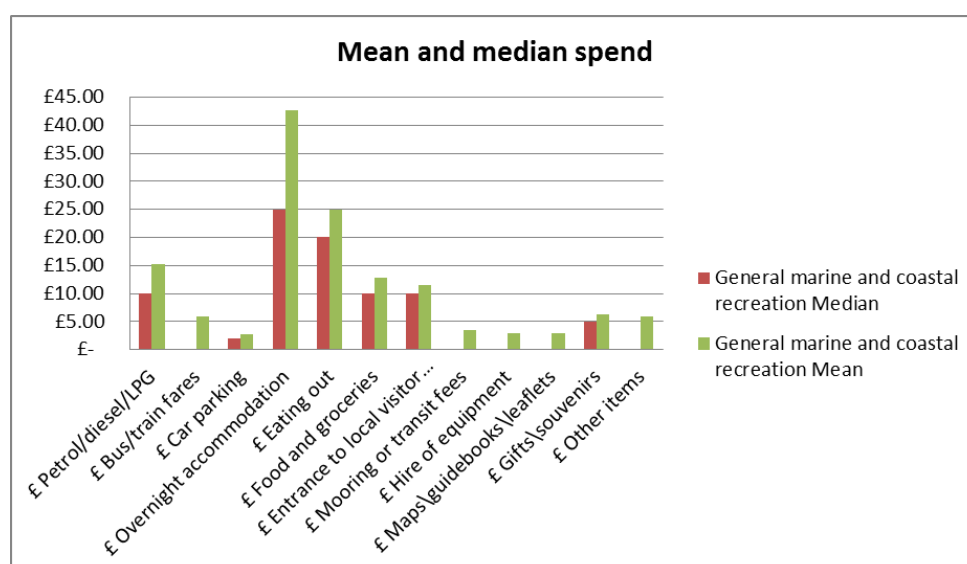


Figure A1.12: General marine recreation – mean and median daily spending

Spend per year by category

24. Similar analysis was carried out for respondents' annual spending on their most general marine recreation activity. Again, the figures exclude the 314 respondents who provided no information on their spending, but include the 50 respondents who stated that they had spent nothing during the previous year.
25. **Table A1.3** shows the annual spending on equipment, storage, memberships and insurance. Again, it is evident that the sample included some very high maximum spending figures and it is, therefore, likely that median rather than mean figures provide a more typical picture of spending associated with marine recreation and tourism. This suggests a median spend of around £75 per annum on general marine recreation.
26. Mean and median spending figures are also shown in **Figure A1.13**.

Table A1.3: all activities – max, mean and median spend per year (£)

	Max (£)	Mean (£)	Median (£)
Equipment	2,500	142	50
Storage	13,000	222	0
Memberships	450	45	25
Insurance	850	72	0
TOTAL	15,900	259	75

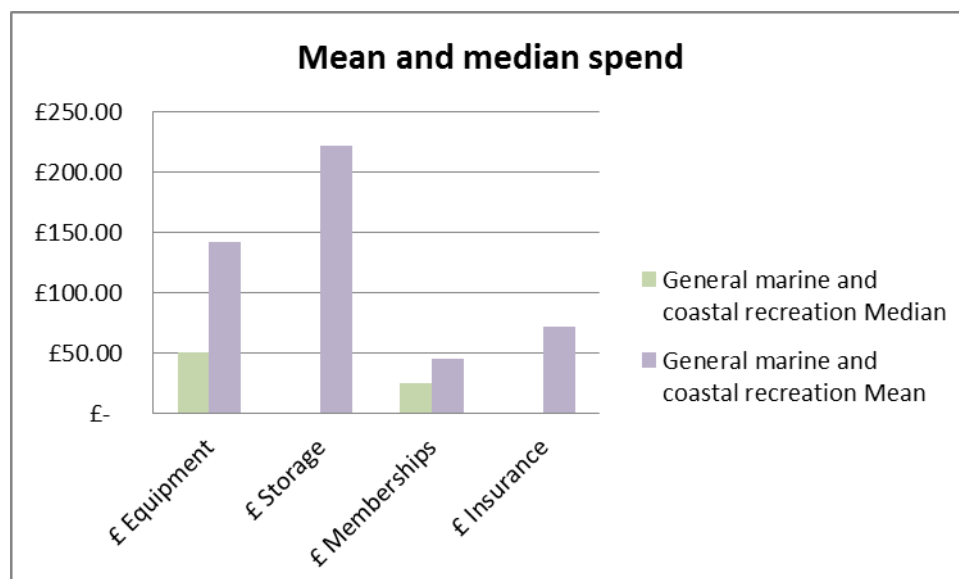


Figure A1.13: General marine recreation – mean and median annual spending

Clubs and codes of conduct

27. Respondents were asked about their membership of clubs and their awareness of codes of conduct. Most of this information is relevant to specific types of activity, but is presented here for completeness.

Club membership

28. Of the 550 people who answered this question, around 70% do not belong to an organisation which relates to coastal recreation or tourism. This is not surprising given the high proportion of people undertaking less formal forms of recreation.

Table A1.4: General marine recreation- membership of clubs, associations or governing bodies

	Do you belong to any clubs, associations or governing bodies relating to coastal recreation?
Local organisation	82
National organisation	68
None	346
Grand Total	496

Awareness of codes of conduct

29. Analysis suggests that, for people undertaking general marine recreation there were relatively high levels of awareness of the Scottish Outdoor Access Code (around 85% stating they were definitely or possibly aware) and the Scottish Marine Wildlife Watching Code (around 50% stating they were definitely or possibly aware). Most of the other codes of conduct are specific to other activities, so it is not surprising that awareness rates are much lower.

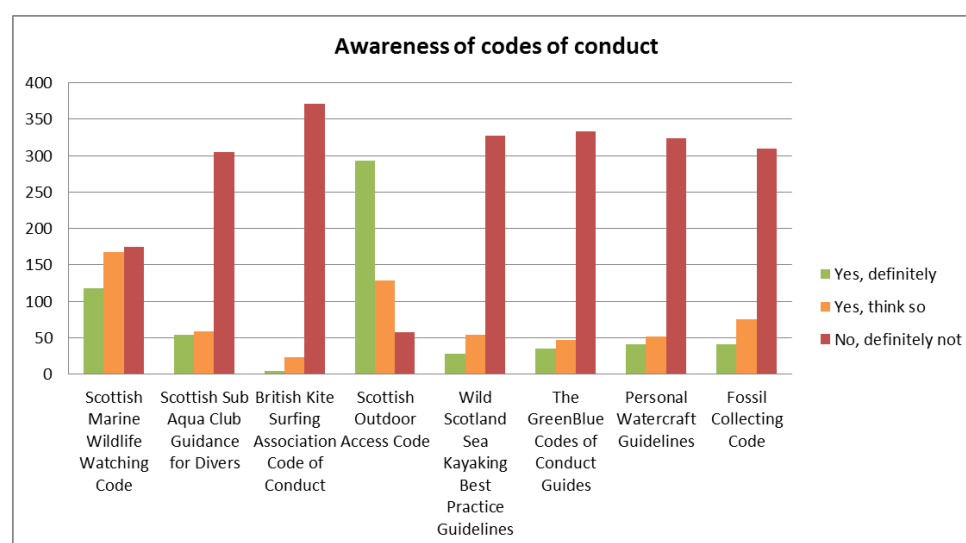


Figure A1.14: General marine recreation – awareness of codes of conduct

Socio-economic profile
Age and gender

30. **Figure A1.15** shows the age and gender profile of all those who indicated that they had taken part in general marine recreation during the past 12 months. This is as distinct from those who identified general marine recreation as one of their most important activities. Comparison with the whole survey sample suggests that the age and gender composition of people undertaking general marine recreation was similar to that for the wider sample. The distribution is biased towards the 45 to 65

age category, particularly for men, though this is slightly less pronounced than for the whole survey sample. Younger age classes, while less numerous, have more female than male respondents.

31. **Figure A1.16** shows the age and gender profile of those who identified general marine recreation as one of their most important activities. The profile is significantly different from those participating and from the whole survey sample with a much larger proportion of women across all age categories, with the exception of people over the age of 65.

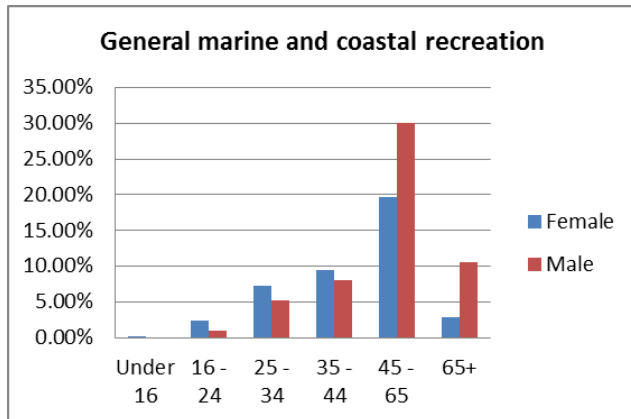


Figure A1.15: Age and gender profile of people taking part in general marine recreation

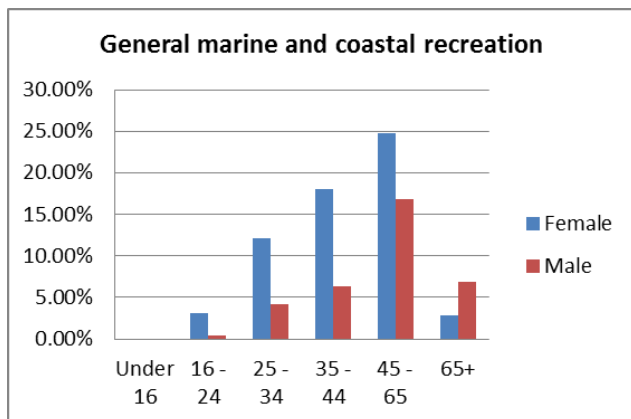


Figure A1.16: Age and gender profile of people identifying general marine recreation as an ‘important activity’

Household income

32. Analysis of respondents’ household income suggests around 60% of people undertaking general marine recreation have incomes of £26,000 or more. This is lower than for the survey sample as a whole, but indicates incomes higher than the Scottish household average (2014²⁹) of around £23,000.

²⁹ <http://www.bbc.co.uk/news/uk-scotland-scotland-business-32236595>

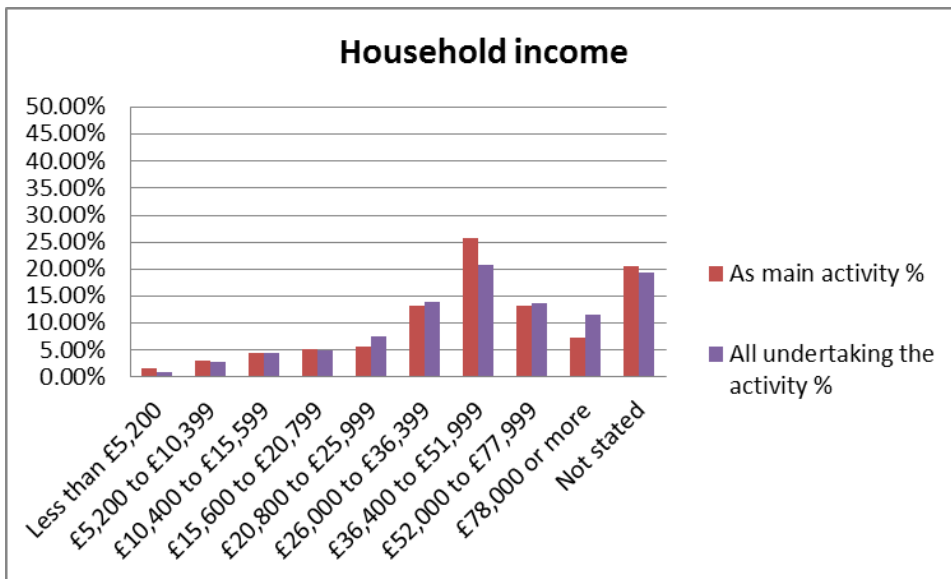


Figure A1.17: Household income of people identifying general marine recreation as a main activity and those indicating they participated during the previous 12 months

Business survey findings

- 33. 77 of the 279 respondents in the business survey stated that their business serves general marine and coastal recreation. **Figure A1.18** shows the distribution of the businesses across Marine Regions. This survey is based on a small sample and the results should, therefore, be treated with caution.

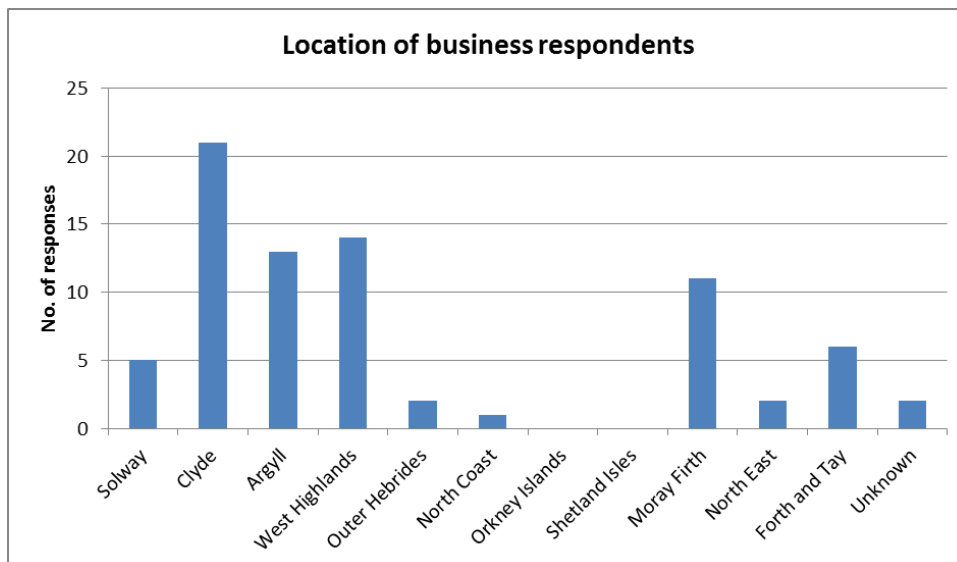


Figure A1.18: Distribution of the businesses across Marine Regions

- 34. Business respondents were asked to indicate the kinds of services they provide. **Figure A1.19** shows the services provided by businesses serving general marine recreation.

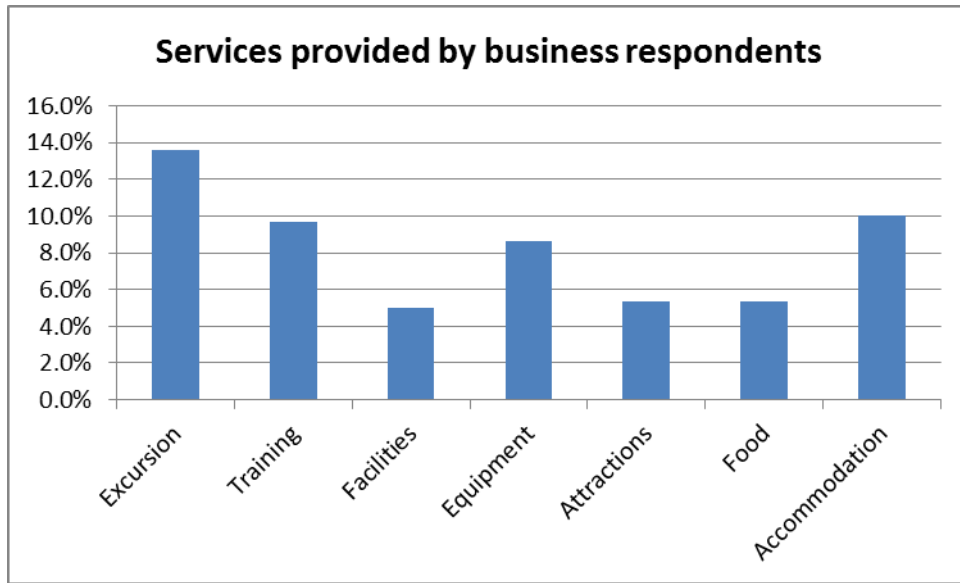


Figure A1.19: Services provided by businesses serving general marine recreation