

Walking more than 2 miles

## **Appendix 4** Walking at the coast



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## Appendix 4

### Walking at the coast

**Table A4.1: 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	<b>Robust sample</b>	<b>Robust sample</b>

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

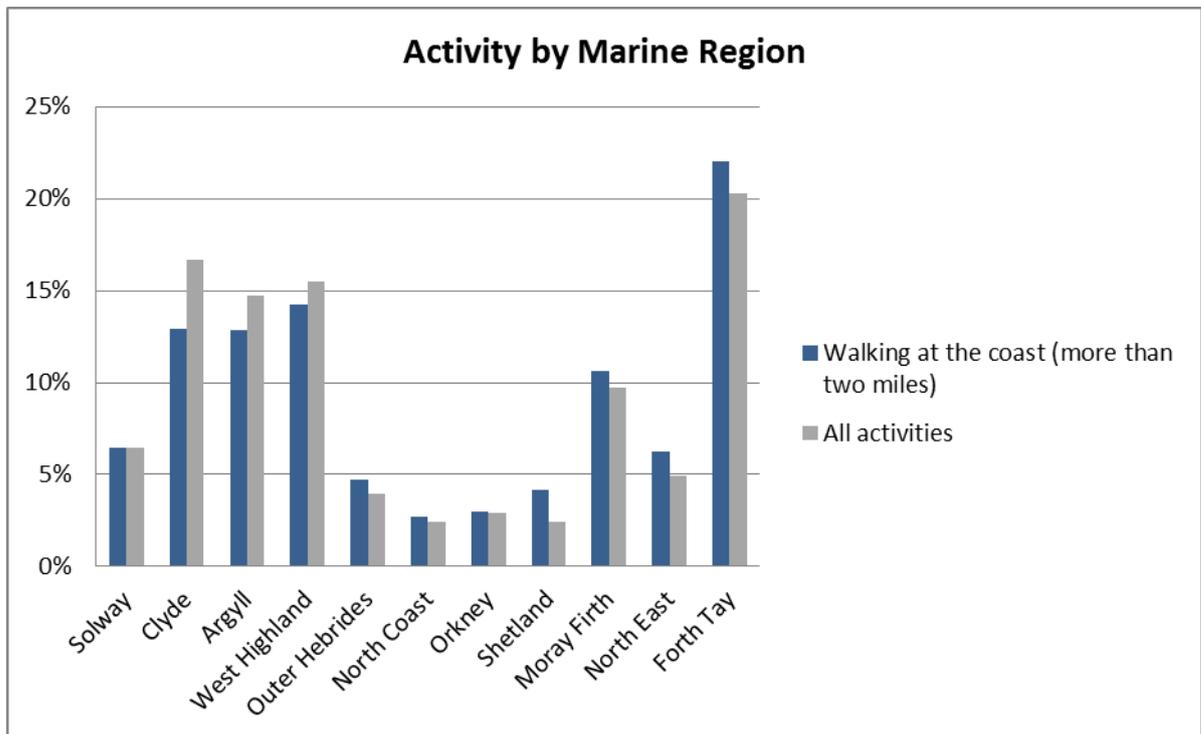
1. This category gathered information on longer distance walking (more than two miles) which takes place along the coastline. Shorter walks are included in the ‘General marine and coastal recreation’ category.

#### Sample sizes

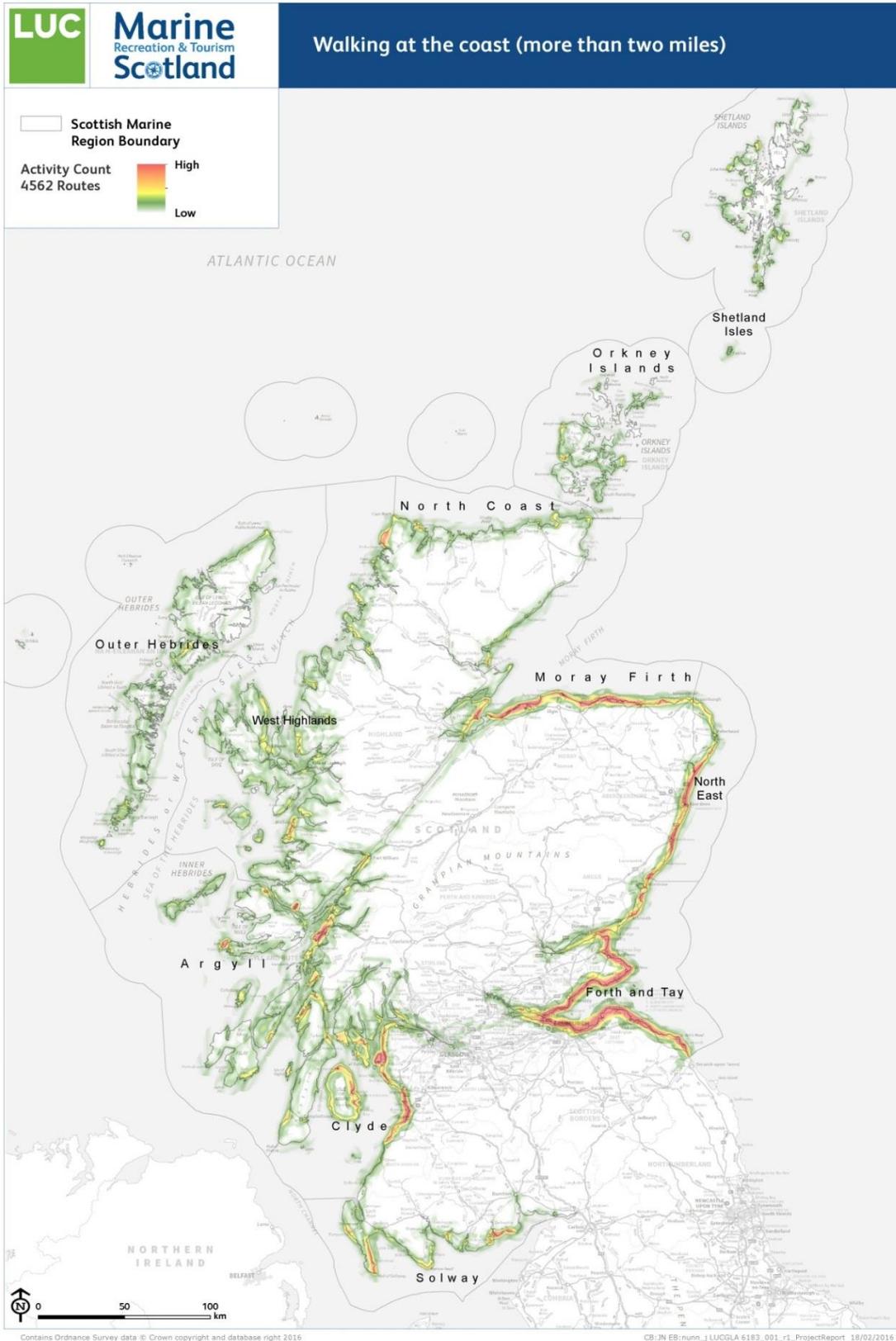
2. The survey collected information on participation in recreation and tourism activities in two ways. Firstly, survey respondents were asked to list all the activities they had undertaken during the previous 12 months, completing a map for each. Secondly, they were asked to identify the one or two activities that they considered most import. They were asked a series of questions relating to their participation in these activities.
3. A total of **1413** people provided spatial information on longer distance walks, representing around 60% of the total sample. **259** people identified longer distance walks as one of their most important activities, representing around 11% of the total sample.
4. 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.
5. Around 18% of those who provided spatial data on longer distance walking identified it as one of their most important activities.
6. 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 25% more than five miles. The remaining 10% of respondents came from outside Scotland.

Spatial data

7. People completing the survey identified 4562 routes they had walked. This information has been used to generate a heat map showing the concentration walking activity around the Scottish coast (see **Map A4.1**). Concentrations of activity are visible along the Lothian and Fife coastlines, around Aberdeen and along the coast of the Moray Firth. Activity on the west coast is more fragments, reflecting the character of the coastline, though concentrations can be seen in Ayrshire (including Cumbrae and Arran), around Oban, Iona, Arisaig and the far north west around Sandwood Bay. This map is available on Marine Scotland’s National Marine Plan Interactive (NMPi) website (<https://marinescotland.atkinsgeospatial.com/nmpi/>).
8. **Figure A4.1** shows the percentage distribution of longer distance walks across Marine Regions. It shows that marine regions along the east coast (Forth Tay, North East and Moray Firth) and islands (Shetland and Western Isles) recorded a higher proportion of walking routes than the survey sample as a whole. West coast Marine Regions such as Argyll, Clyde and West Highland, by contrast, recorded relatively lower levels of walking activity.



**Figure A4.1: Spread of long distance walking across Marine Regions (%)**



Map A4.1: Long distance walking (1413 responses)

Trip planning

9. Respondents were asked about the factors influencing their decision on where to go walking, and about the sources of information they used to inform that decision.

*Factors influencing decisions on where to go*

10. Important factors influencing where people go to walk along the coast include attractive scenery, the possibility of seeing wildlife, the presence of historic and cultural heritage and the suitability of the area for walking. Less important factors included whether the place had been visited before, the availability of activity specific facilities, the availability of accommodation, and the range of other things to do.

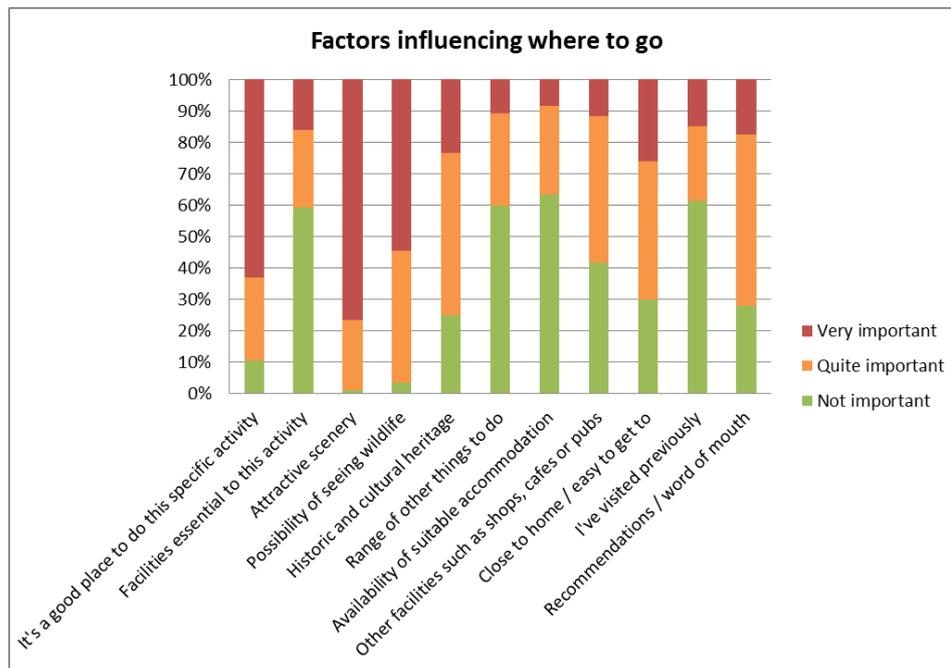
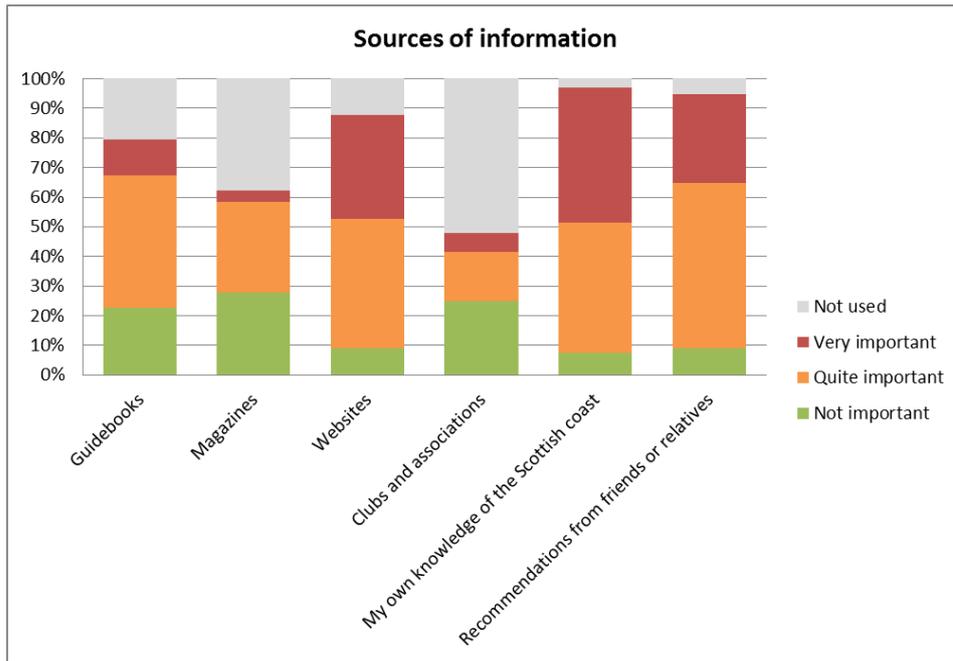


Figure A4.2: Long distance walking - factors influencing where to go

*Sources of information*

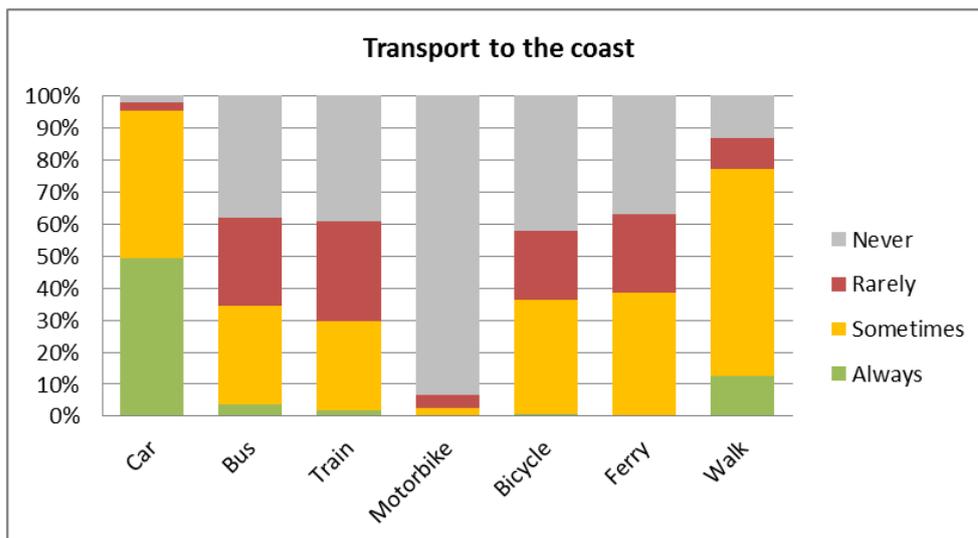
11. People’s own knowledge of the Scottish coastline, together with recommendations from friends and family, websites and guidebooks are the most important sources of information when deciding on where to go. Magazines and clubs and associations play a lesser role.



**Figure A4.3: Long distance walking – sources of information**

Characteristics of trip to the coast  
*Transport to start point*

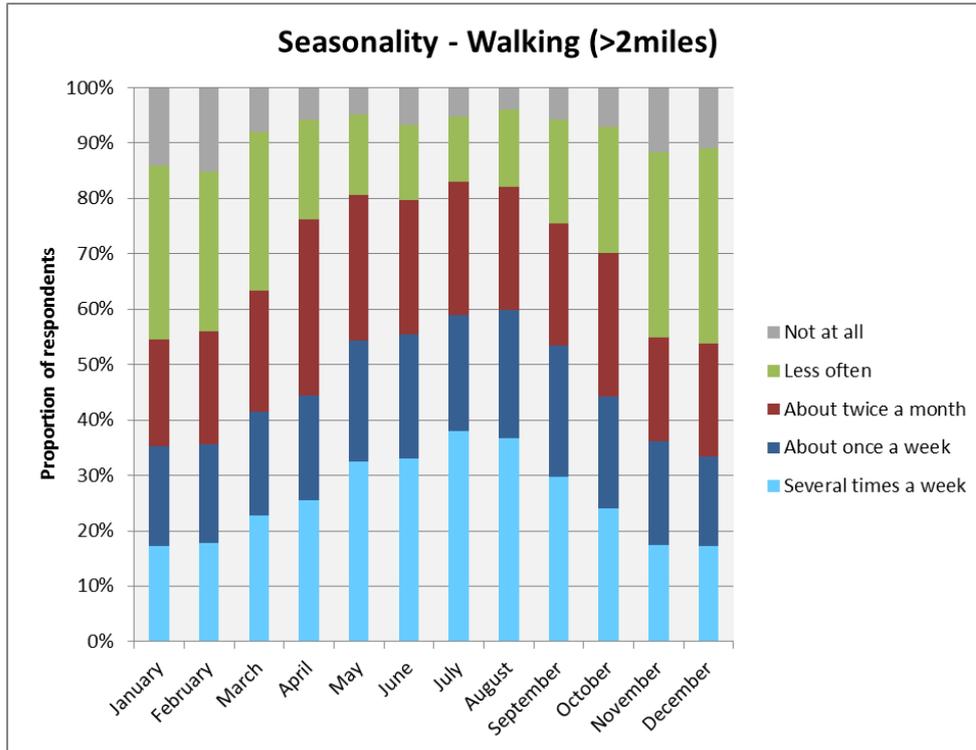
- Car is by far the most common mode of transport to the start of people’s visit to the coast, with just under half of respondents indicating they always travel that way, and most of the remainder indicating they sometimes go by car. Around two thirds of people sometimes walk to the coast, reflecting the high proportion of respondents living in coastal locations. Buses, trains, ferries and bicycles are used by around a third of respondents.



**Figure A4.4: Long distance walking - transport**

*Monthly profile of activity*

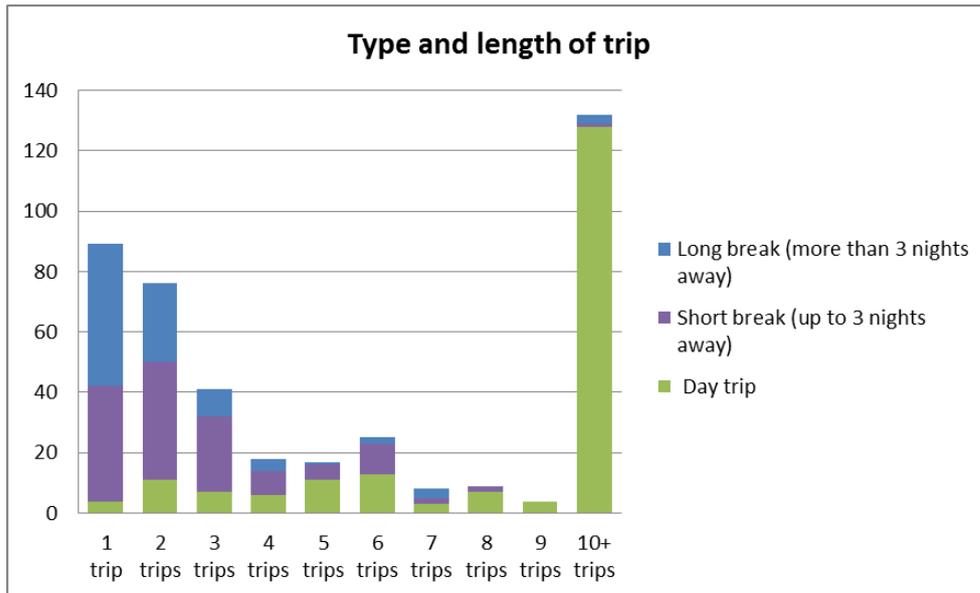
13. **Figure A4.5** shows the frequency of longer distance walking at the coast across each month of the year. While the proportions walking once a week or twice a month remain relatively constant (between 20% and 30% for any given month) there is a noticeable peak in the number of people walking several times a week between May and September.



**Figure A4.5: Long distance walking - seasonality**

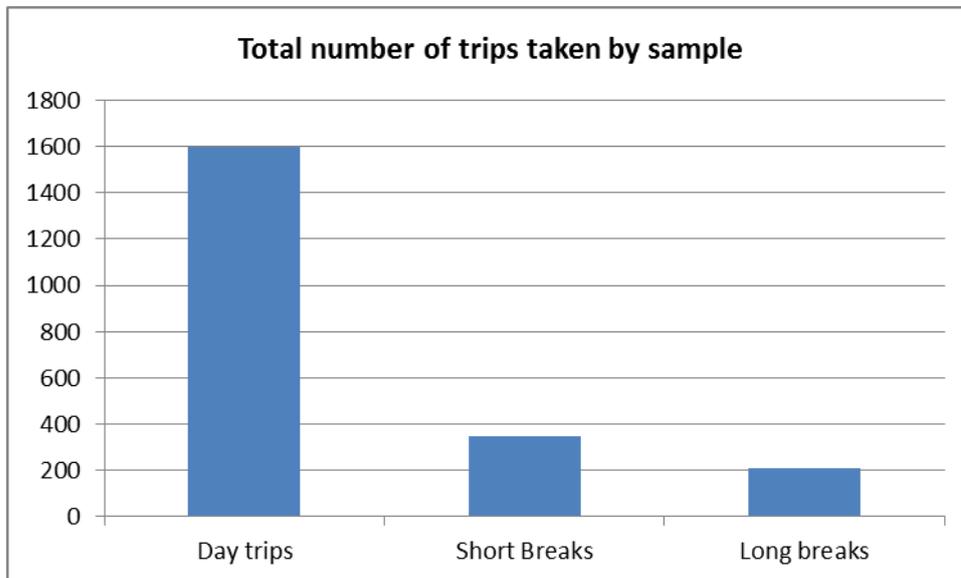
*Trip length*

14. People undertaking longer walks along the coast made an average of around 6.6 day trips, just under 1.5 short breaks and just under 1 longer break per year. Comparison with the whole survey sample indicates more day trips but fewer short and longer breaks.



**Figure A4.6: Long distance walking - length of trip**

- The sample of 259 respondents accounts for a minimum of around 1600 day trips, 350 short breaks and 210 longer breaks.



**Figure A4.7: Long distance walking – total number of trips**

*Accommodation used*

- People provided information on the types of accommodation they typically use. Staying with friends and family, followed by hotels, self-catering and bed and breakfast were the most commonly used forms of accommodation.

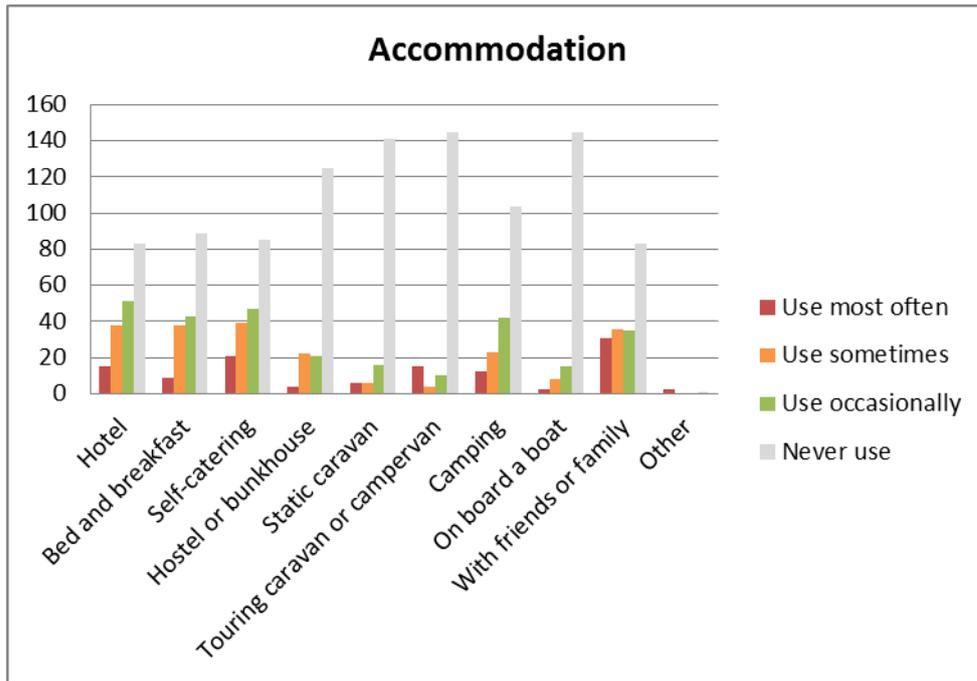
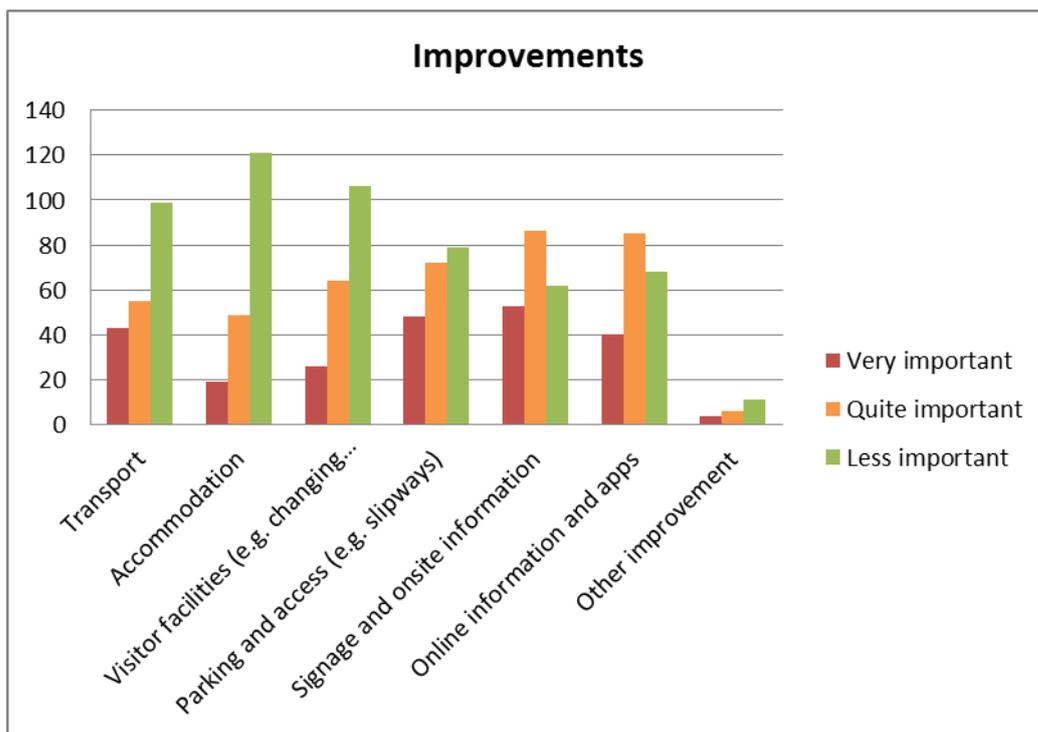


Figure A4.8: Long distance walking – accommodation

*Improvements to make trip more enjoyable*

- Walkers tend to identify the need for fewer improvements than people undertaking other forms of recreation and tourism. The most commonly cited improvements related to on-site information and signage and on-line information, but even here most improvements were highlighted as being 'quite' rather than 'very important'.



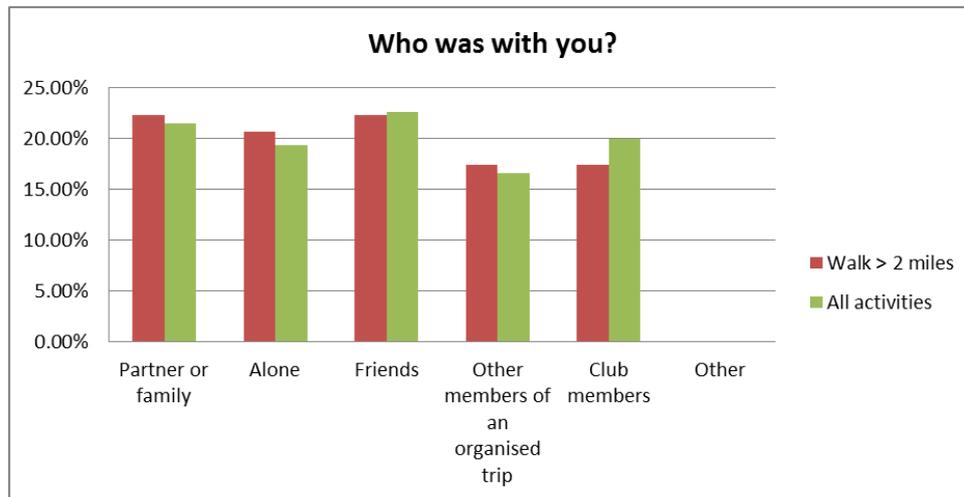
**Figure A4.9: Long distance walking - improvements**

Party

- 18. 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?*

- 19. **Figure A4.10** suggests that, for longer distance walkers, there was a fairly even spread across the different types of companion. People were most commonly with friends, partner or family or alone. People were least frequently with members of a club or part of an organised trip.

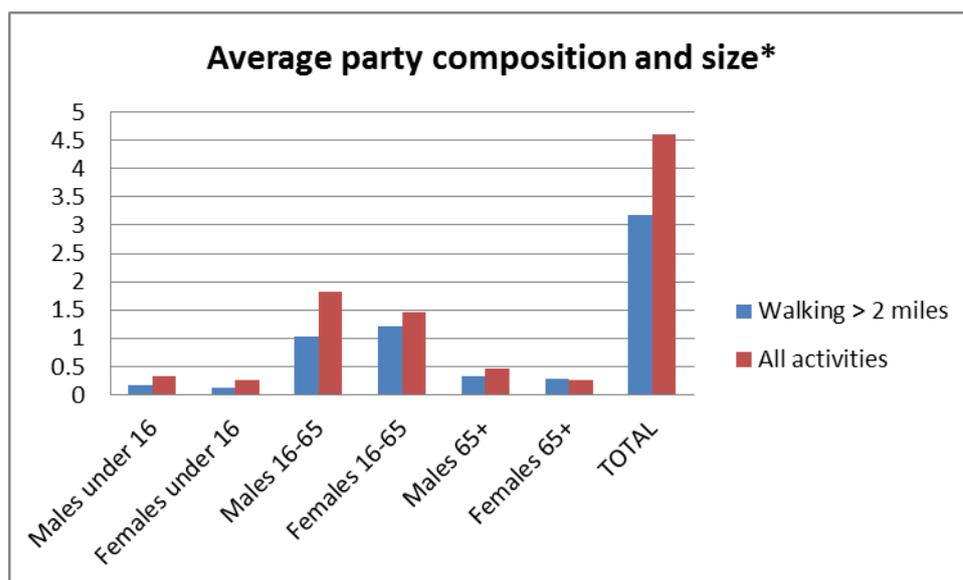


**Figure A4.10: Long distance walking - party**

*Age groups and gender composition of party*

- 20. Respondents were also asked about the age and gender composition of their party<sup>32</sup>. **Figure A4.11** shows longer distance walkers tend to be in smaller parties than for the survey sample as a whole. Parties most commonly comprised people in the age groups between 16 and 65, with slightly more women than men.

<sup>32</sup> \* 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 A4.11: Long distance walking – party composition**

### Spending

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

#### *Spend per day during visit by category*

22. Analysis excludes the 32 respondents who provided no information on their spending, but include the 50 respondents who stated that they spent nothing during their trip.
23. **Table A4.2** shows the maximum, mean and median daily spending against a series of headings. This analysis suggests a median spend of around £25 per day during longer distance walks on the Scottish coast.

**Table A4.2: Long distance walking – max, mean and median spend per trip (£)**

	Max (£)	Mean (£)	Median (£)
Petrol/diesel/LPG	80	14	10
Bus/train fares	80	9	0
Car parking	10	2	2
Overnight accommodation	200	55	50
Eating out	100	25	20
Food and groceries	100	13	10
Entrance to local visitor attractions	50	10	10

	Max (£)	Mean (£)	Median (£)
Mooring or transit fees	20	1	0
Hire of equipment	60	4	0
Maps/guidebooks/leaflets	30	5	5
Gifts/souvenirs	40	7	5
Other	30	5	0
<b>TOTAL</b>	<b>420</b>	<b>60</b>	<b>25</b>

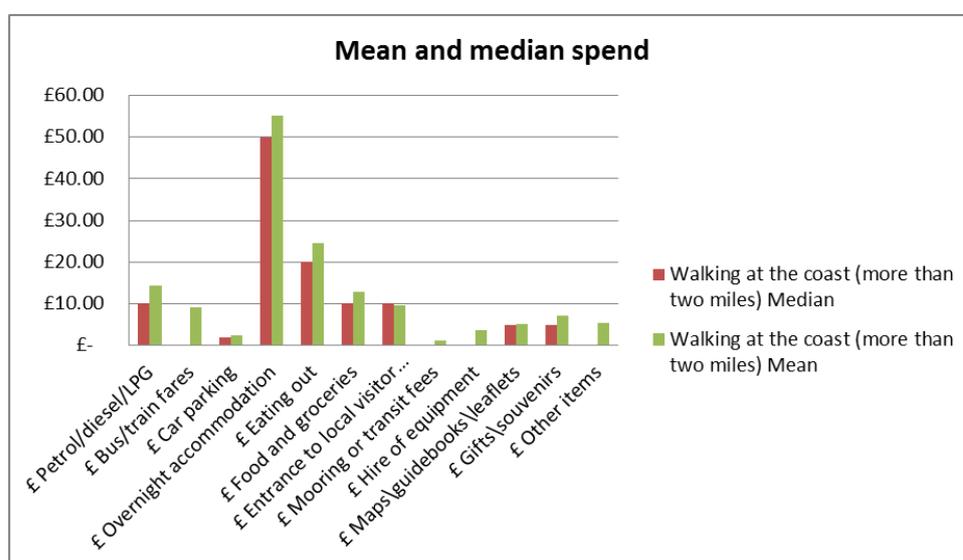


Figure A4.12: Long distance walking – mean and median spend per day

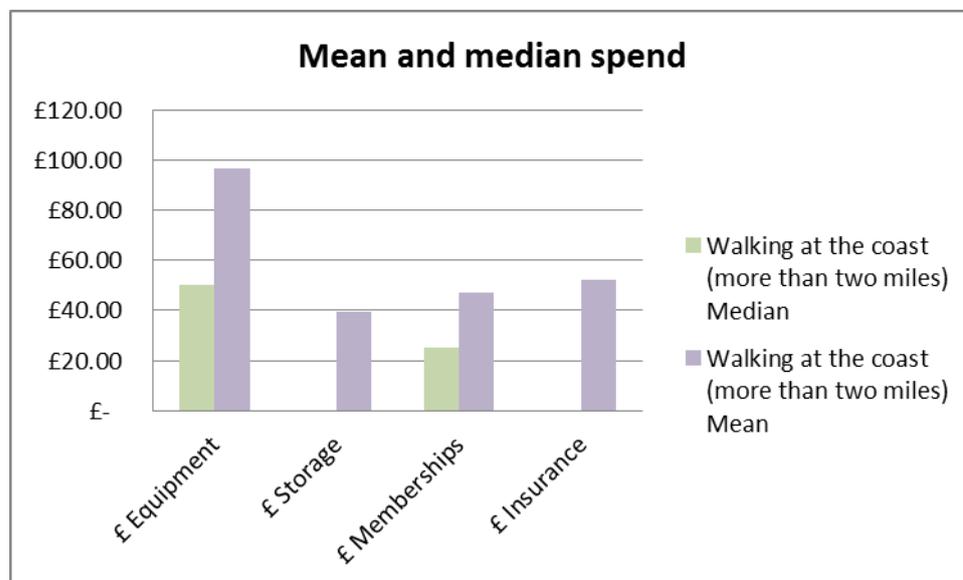
#### Spend per year by category

24. Respondents were also asked to record their annual spending on longer distance walking. The analysis excludes the 138 respondents who provided no information on their spending, but include 14 respondents who stated their annual spending as being zero. **Table A4.3** shows the maximum, mean and median annual spend for a number of categories. The range of spending was high so the median spend figure has been taken to provide an overall value for this activity. This suggests that the median figure spent on longer distance walking was £93.

Table A4. 3: Walking – max, mean and median spend per year (£)

	Max (£)	Mean (£)	Median (£)
Equipment	500	97	50
Storage	1000	39	0
Memberships	300	47	25

	Max (£)	Mean (£)	Median (£)
Insurance	400	52	0
<b>TOTAL</b>	<b>1400</b>	<b>135</b>	<b>93</b>



**Figure A4.13: Long distance walking – mean and median spend year**

#### Clubs and codes of conduct

25. 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*

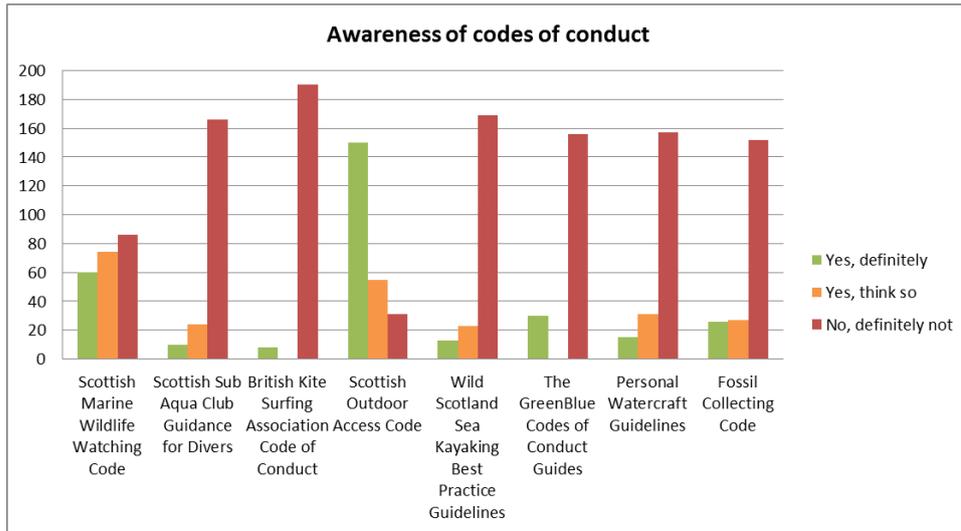
26. Of the 244 people who answered this question, around 72% did not belong to an organisation which relates to coastal recreation or tourism. This is not surprising given the nature of this activity.

**Table A4. 4: Long distance walking - membership of clubs, associations or governing bodies**

	Do you belong to any clubs, associations or governing bodies relating to coastal recreation?
Local organisation	42
National organisation	25
None	177
<b>Grand Total</b>	<b>244</b>

*Awareness of codes of conduct*

27. Long distance walkers had 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 55% 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.



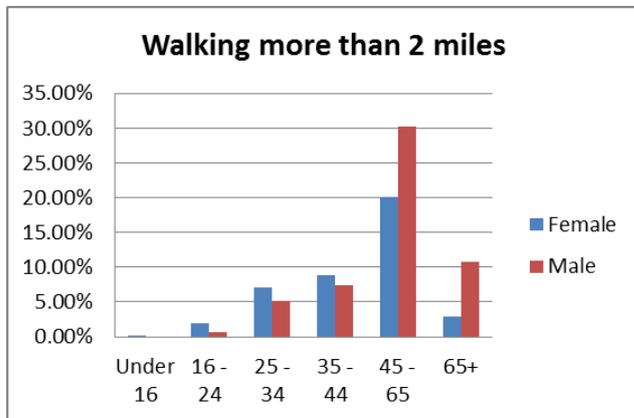
**Figure A4.14: Long distance walking – codes of conduct**

*Socio-economic profile*  
*Age and gender*

28. **Figure A4.15** shows the age and gender profile of all those who indicated that they had been on walks longer than 2 miles on the coast during the past 12 months. This is as distinct from those who identified walks of 2 miles or more as one of their most important activities. Comparison with the whole survey sample suggests that the age and gender composition of people walking on the coast was significantly different from that of the wider sample. Women between the ages of 25 and 65 are noticeably more numerous than men, with women aged 45-65 accounting for around 28% of the sample.
29. **Figure A4.16** shows the age and gender profile of those who identified longer distance walking as one of their most important activities. The profile is much closer to that for the overall survey sample, suggesting there is a difference between those who take part in long distance walking, and those who regard it as their main activity.



**Figure A4.15: Age and gender profile of all people undertaking longer distance walks**



**Figure A4.16: Age and gender profile of all people identifying longer distance walks as an 'important activity'**

*Household income*

30. Analysis of respondents' household income suggests around 60% of long distance walkers have incomes of £26,000 or more. This is slightly lower than for the survey sample as a whole, but indicates incomes higher than the Scottish household average (2014) of around £23,000. There is little variation between those who took part in longer distance walks and those who identified this as one of their main activities.

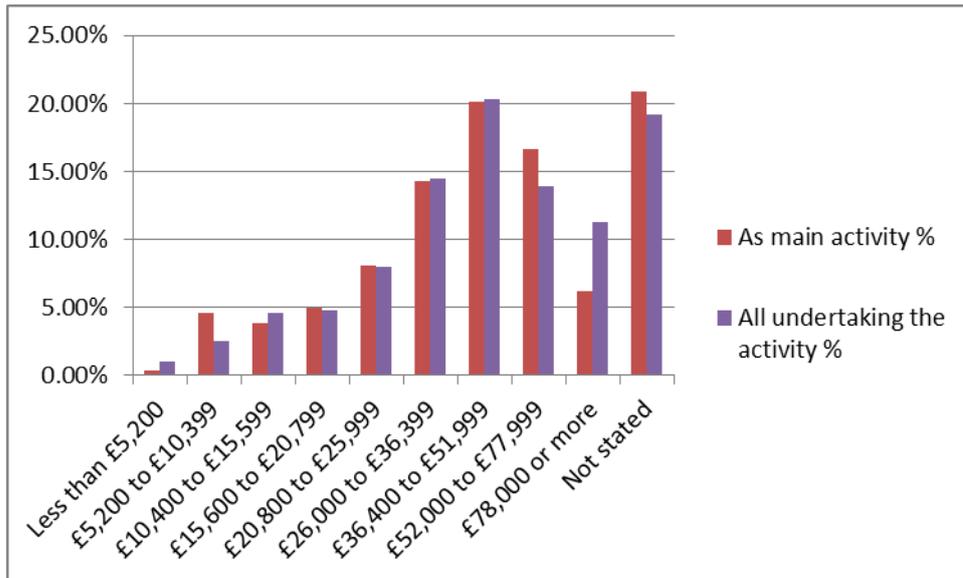


Figure A4.17: Longer distance walks – household income

Business survey findings

- 31. 54 of the 279 respondents in the business survey stated that their business serves longer distance walking at the coast. **Figure A4.18** 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.

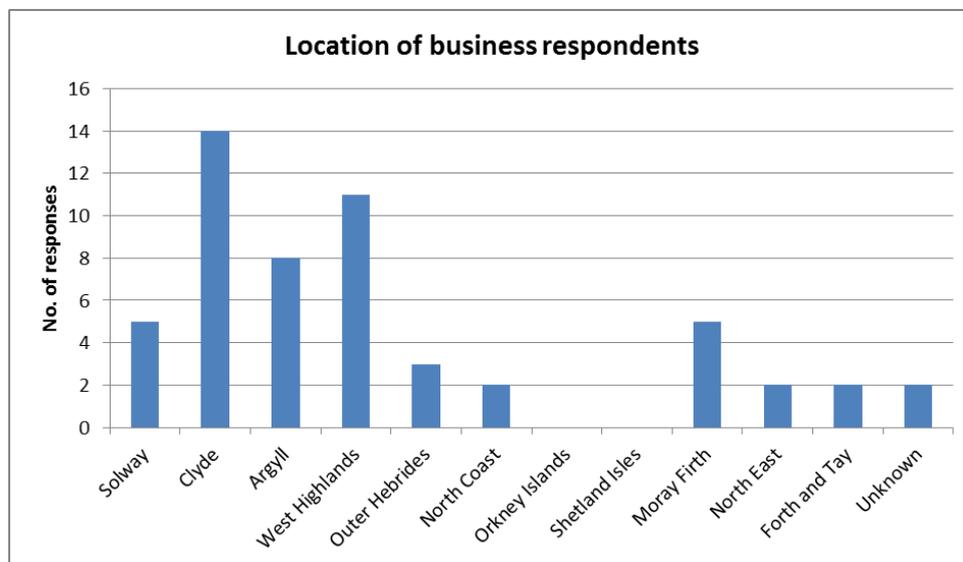
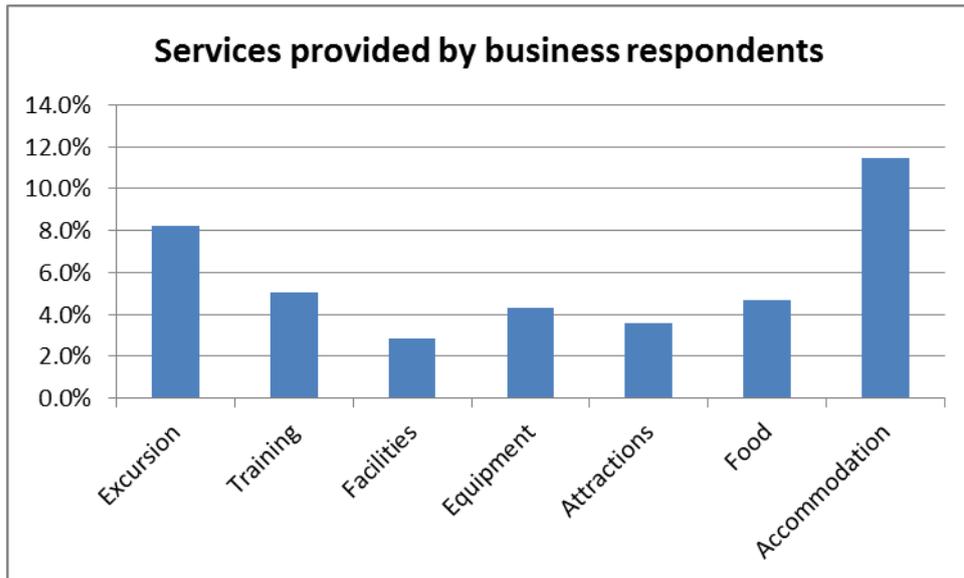


Figure A4.18: Distribution of the businesses across Marine Regions

- 32. Business respondents were asked to indicate the kinds of services they provide. **Figure A4.19** shows the services provided by businesses serving longer distance coastal walks.



**Figure A4.19: Services provided by businesses serving longer distance coastal walks**