Appendix 2
General marine and coastal tourism

© Firth of Clyde Forum
Appendix 2

General marine and coastal tourism

Table A2.1: Summary of sample confidence levels

<table>
<thead>
<tr>
<th>Responses</th>
<th>Spatial data</th>
<th>Questionnaire data</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;30</td>
<td>Very low sample – interpret spatial data</td>
<td>Very low sample – do not analyse</td>
</tr>
<tr>
<td></td>
<td>with great care</td>
<td>questionnaire results</td>
</tr>
<tr>
<td>30 – 60</td>
<td>Low sample – interpret spatial data with</td>
<td>Low sample – analyse questionnaire</td>
</tr>
<tr>
<td></td>
<td>care</td>
<td>results with caution</td>
</tr>
<tr>
<td>60 – 100</td>
<td>Medium sample – good spatial data</td>
<td>Medium sample – analyse questionnaire</td>
</tr>
<tr>
<td></td>
<td></td>
<td>results with care</td>
</tr>
<tr>
<td>&gt;100</td>
<td>Robust sample</td>
<td>Robust sample</td>
</tr>
</tbody>
</table>

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 tourism activities such as scenic drives or bus tours.

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 important. They were asked a series of questions relating to their participation in these activities.

3. A total of 802 people provided spatial information on general marine and coastal tourism, representing around a third of the total sample. This is a good sample, meaning that confidence in the analysis of spatial information 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. Just 37 people identified general marine and coastal tourism as one of their most important activities, representing just under 2% of the total sample. This is small sample, meaning that confidence in the analysis of responses is low and the results should, therefore, be interpreted with caution.

5. Around 5% of those who participated in general marine and coastal recreation identified it as one of their most important activities.

6. Based on the sample of people who provided spatial information, around 44% of respondents lived within a mile of the Scottish coastline, 18% between one and five miles and 25% more than five miles. The remaining 12% of respondents came from outside Scotland.
General marine and coastal tourism

7. People completing the survey identified just over 2645 routes for general marine and coastal tourism. This information has been used to generate a heat map showing the concentration of general marine and coastal tourism activity around the Scottish coast (see Map 3.3). The map shows activity along much of the mainland coastline with concentrations within the Firth of Clyde, Argyll, Loch Linne and the Great Glen, Moray Firth, Firth of Forth and east coast. Specific routes can be seen, including the circuit of Arran, tour of Skye, and journey through the Western Isles together with the inland part of people’s trips such as the A9 and A96. This map is available on Marine Scotland’s National Marine Plan Interactive (NMPi) website (https://marinescotland.atkinsgeospatial.com/nmpi/).

8. Figure A2.1 shows the percentage distribution of general tourism activity across Marine Regions. It indicates a pattern very similar to the survey sample as a whole. Clyde and Moray Firth had greater proportions of people undertaking marine and coastal tourism, while smaller proportions were recorded for the Forth Tay, Solway and North East Marine Regions.

![Activity by Marine Region](image)

**Figure A2.1:** Spread of General Marine Tourism activity across Marine Regions (%)
General marine and coastal tourism

Map A2.1: General marine and coastal tourism (802 responses)
Trip planning

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

Factors influencing decisions on where to go

10. The most important factors in influencing where people went were: attractive scenery; the suitability of their destination for general tourism; the possibility of seeing wildlife; presence of historic and cultural heritage features; and cafés, shops and restaurants. Less important factors included whether the place had been visited before, the availability of activity specific facilities, proximity to home, the availability of accommodation and range of other things to do.

Sources of information

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

Characteristics of trip to the coast

Transport to start point

12. 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 40% 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 A2.3: General Marine Tourism - information when deciding where to go

Figure A2.4: General marine tourism – transport to the coast
Monthly profile of activity

13. Figure A2.5 shows the clear influence of seasonality on the number and frequency of visits to the coast for general tourism. The proportion of people visiting the coast frequently peaks in June and September, while the number visiting the coast once a week peaks during August and July. This may reflect the greater number of longer trips during the summer months. The small sample should be also be considered. As would be expected, tourism activity is lowest in the winter months between November and February.

![Seasonality - General tourism](image)

**Figure A2.5: General marine tourism – seasonality and frequency of visit**

Trip length

14. People undertaking general marine and coastal tourism made an average of around 5 day trips, just over 1 short break and around 1.5 longer breaks per year. Comparison with the whole survey sample indicates similar average numbers of day trips and longer breaks but a smaller than average number of short and longer breaks.
15. The sample of 39 respondents accounts for a minimum of 185 day trips, 40 short breaks and over 55 longer breaks.

**Figure A2.6: General marine tourism – type and length of trip**

**Figure A2.7: General marine tourism – total number of trips**

**Accommodation used**

16. People taking short or long breaks provided information on the types of accommodation they typically use. Staying with friends and family, bed and breakfast and self-catering were the most commonly used forms of accommodation. Hostels and static caravans were less popular.
Figure A2.8: General marine tourism – accommodation

**Improvements to make trip more enjoyable**

17. People undertaking tourism visits to the coast pointed to the need for improvements across a wide range of issues. The improvements judged to be most important were on-line information, transport, signage and on-site information and parking. Accommodation and visitor facilities were generally considered less in need of improvement.

Figure A2.9: General marine tourism – 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 A2.10** suggests that, for people selecting general marine tourism 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, or alone. People were least frequently with other members of an organised trip, or members of a club.

![Graph showing who was with you](image)

**Figure A2.10: General marine tourism – party**

**Age groups and gender composition of party**

20. Respondents were also asked about the age and gender composition of their party\(^\text{30}\). **Figure A2.11** shows general marine tourism 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 similar numbers of men and women.

\(^{30}\) 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.
Spend per day during visit by category

22. Analysis excludes the 3 respondents who provided no information on their spending, but includes the 3 respondents who stated that they spent nothing during their trip.

23. Table A2.2 shows the maximum, mean and median daily spending against a series of headings. Spending on accommodation and fuel was higher than the average across all survey activities, reflecting the nature of tourism activities. For most other categories (with the exception of mooring/transit fees and equipment hire which are less relevant to this activity), spending levels were similar to the larger sample. This analysis suggests a median spend of around £93 per day during tourism trips to the Scottish coast.

Table A2.2: General marine tourism – max, mean and median spend per trip (£)

<table>
<thead>
<tr>
<th>Category</th>
<th>Max (£)</th>
<th>Mean (£)</th>
<th>Median (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Petrol/diesel/LPG</td>
<td>100</td>
<td>28</td>
<td>20</td>
</tr>
<tr>
<td>Bus/train fares</td>
<td>50</td>
<td>12</td>
<td>2</td>
</tr>
<tr>
<td>Car parking</td>
<td>12</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Overnight accommodation</td>
<td>160</td>
<td>66</td>
<td>70</td>
</tr>
<tr>
<td>Eating out</td>
<td>100</td>
<td>29</td>
<td>28</td>
</tr>
<tr>
<td>Food and groceries</td>
<td>200</td>
<td>27</td>
<td>10</td>
</tr>
</tbody>
</table>
General marine and coastal tourism

<table>
<thead>
<tr>
<th>Category</th>
<th>Max (£)</th>
<th>Mean (£)</th>
<th>Median (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance to local visitor attractions</td>
<td>40</td>
<td>14</td>
<td>10</td>
</tr>
<tr>
<td>Mooring or transit fees</td>
<td>30</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>Hire of equipment</td>
<td>25</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>Maps/guidebooks/leaflets</td>
<td>10</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Gifts/souvenirs</td>
<td>40</td>
<td>11</td>
<td>5</td>
</tr>
<tr>
<td>Other</td>
<td>20</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>522</strong></td>
<td><strong>127</strong></td>
<td><strong>93</strong></td>
</tr>
</tbody>
</table>

**Figure A2.12: General marine tourism – mean and median daily spending**

**Spend per year by category**

24. Respondents were also asked to record their annual spending on marine and coastal tourism. 25 respondents provided no information on their spending meaning the sample is too small to analyse reliably. The low response rate is probably a reflection of the fact that most categories of annual expenditure are not relevant to tourism activities.

**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.
26. Of the 35 people who answered this question, around 75% 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 tourism.

**Table A2.3: General marine tourism - membership of clubs, associations or governing bodies**

<table>
<thead>
<tr>
<th></th>
<th>Do you belong to any clubs, associations or governing bodies relating to coastal recreation?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local organisation</td>
<td>4</td>
</tr>
<tr>
<td>National organisation</td>
<td>5</td>
</tr>
<tr>
<td>None</td>
<td>26</td>
</tr>
<tr>
<td>Grand Total</td>
<td>35</td>
</tr>
</tbody>
</table>

**Awareness of codes of conduct**

27. Analysis suggests that, for people undertaking general marine tourism there were relatively high levels of awareness of the Scottish Outdoor Access Code (around three quarters stating they were definitely or possibly aware) and the Scottish Marine Wildlife Watching Code (around half 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 A2.13: General marine tourism – awareness of codes of conduct](image)

**Socio-economic profile**

**Age and gender**

28. **Figure A2.14** shows the age and gender profile of all those who indicated that they had taken part in general marine tourism during the past 12 months. This is as distinct from those who identified general marine tourism 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 tourism was similar to that for the wider sample. The distribution is biased towards the 45 to 65 age category, particularly for men. Younger age classes, while less numerous, have more female than male respondents.

29. **Figure A2.15** shows the age and gender profile of those who identified general marine tourism 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 most age categories. Again, the small size of this sample should be noted.

![Figure A2.14: Age and gender profile of people taking part in general marine tourism](image1.png)

**Figure A2.14: Age and gender profile of people taking part in general marine tourism**

![Figure A2.15: Age and gender profile of people identifying general marine tourism as an ‘important activity’](image2.png)

**Figure A2.15: Age and gender profile of people identifying general marine tourism as an ‘important activity’**

**Household income**

30. Analysis of respondents’ household income suggests around 50% of people undertaking general marine tourism 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 (2014) of around £23,000. Figures for those identifying marine tourism as a main activity are very low, with around a third of respondents electing not to provide this information. The results are, therefore, not reliable.
General marine and coastal tourism

Business survey findings

31. 53 of the 279 respondents in the business survey stated that their business serves general marine and coastal tourism. Figure A2.17 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.

32. Business respondents were asked to indicate the kinds of services they provide. Figure A2.18 shows the services provided by businesses serving general marine tourism.
Figure A2.18: Services provided by businesses serving general marine tourism