Appendix 12
Canoeing or kayaking in the sea
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Table A12.1: 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 with great care</td>
<td>Very low sample – do not analyse questionnaire results</td>
</tr>
<tr>
<td>30 – 60</td>
<td>Low sample – interpret spatial data with care</td>
<td>Low sample – analyse questionnaire results with caution</td>
</tr>
<tr>
<td>60 – 100</td>
<td>Medium sample – good spatial data</td>
<td>Medium sample – analyse questionnaire 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. This category grouped together canoeing and kayaking in the sea, reflecting their similar locational requirements.

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 418 people provided spatial information on canoeing and kayaking, representing around 18% of the total sample. An additional 20 clubs provided spatial information on canoeing and kayaking. 162 people identified canoeing and kayaking as one of their most important activities, representing around 7% 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 38% of those who provided spatial data on canoeing and kayaking identified it as one of their most important activities.

6. Based on the sample of people who provided spatial information, around 48% of respondents lived within a mile of the Scottish coastline, 16% between one and five miles and 24% more than five miles. The remaining 12% of respondents came from outside Scotland.
Spatial data

7. People completing the survey identified 1684 routes they had canoed or kayaked. This information has been used to generate a heat map showing the concentration of activity around the Scottish coast (see Map A12.1). Map A12.2 shows the spatial information provided by club survey responses. Key concentrations of activity include the Firth of Clyde, Argyll Coast, Arisaig, Loch Broom and the Summer Isles, parts of the north coast, Moray Firth and sections of the Firth of Forth. These maps are available on Marine Scotland’s National Marine Plan Interactive (NMPi) website (https://marinescotland.atkinsgeospatial.com/nmpi/).

8. Figure A12.1 shows the percentage distribution of canoeing and kayaking across Marine Regions. It absolute numbers highest in the West Highland, Argyll, Clyde, Forth and Tay and Moray Firth Marine Regions. Comparison with the whole survey sample suggests canoeing and kayaking was relatively concentrated in the West Highland, Argyll, Shetland, Outer Hebrides and North Coast Marine Regions.

Figure A12.1: Canoeing and kayaking – spread of activity across Marine Regions
Map A12.1: Canoeing or kayaking (418 individual responses)
Map A12.2: Canoeing or kayaking (20 club responses)
Trip planning

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

Factors influencing decisions on where to go

10. The most important factors influencing canoeist and kayaker’s decisions on where to go include the presence of attractive scenery, good places to canoe and kayak and the possibility of seeing wildlife. Least important factors are the availability of suitable accommodation, range of other things to do and the presence of pubs, cafés or restaurants.

Sources of information

11. The most importance sources of information for canoeists and kayakers are people’s own knowledge of the Scottish coastline and recommendations from friends and family. Clubs and associations, guidebooks and websites are of moderate importance.
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 around 85% of respondents indicating they always travel that way, and most of the remainder indicating they sometimes go by car. Just over half of people sometimes use a ferry as part of their journey while just under 40% of people sometimes walk. Small numbers travel by bus, train or bicycle reflecting the equipment requirements of these activities.

**Figure A12.4: Canoeing and kayaking – transport**
**Monthly profile of activity**

13. **Figure A12.5** shows the frequency of canoeing and kayaking activity across each month of the year. There is a clear peak of activity between April and September with much lower levels of activity during the winter months.

![Seasonality - Canoeing or kayaking](image)

**Figure A12.5: Canoeing and kayaking – seasonality**

**Trip length**

14. Canoeists and kayakers made an average of around 6 day trips, 2 short breaks and 1.2 longer breaks per year. This represents a larger number of day trips, a similar number of short breaks and smaller number of longer trips than the average for the survey sample as a whole.

![Type and length of trip](image)

**Figure A12.6: Canoeing and kayaking – type and length of trip**
15. The sample of 166 respondents accounts for a minimum of around 882 day trips, 292 short breaks and 170 longer breaks.

Figure A12.7: Canoeing and kayaking – number of trips

Accommodation used

16. People provided information on the types of accommodation they typically use. Camping is by far the most popular type of accommodation for canoeists and kayakers.

Figure A12.8: Canoeing and kayaking – accommodation
**Improvements to make trip more enjoyable**

17. The most common area for improvement cited canoeists and kayakers was parking and access followed by and the provision of facilities such as places for changing.

![Improvements bar chart](image)

**Figure A12.9: Canoeing and kayaking – 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 A12.10** suggests that canoeists and kayakers are most likely to be with friends, their partner or family.
Age groups and gender composition of party

20. Respondents were also asked about the age and gender composition of their party. Figure A12.11 shows that canoeists and kayakers tend to be larger parties than was found for the survey sample as a whole. Parties most commonly comprised people in the age groups between 16 and 65, with more men than women.

38 * 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.
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. Table A12.2 shows the maximum, mean and median daily spending against a series of headings. This analysis suggests a median spend of around £40 per day during canoeing and kayaking trips to the coast.

23. These figures exclude the 9 respondents who provided no information on their spending, but include the 15 respondents who stated that they spent nothing during their trip.

24. Maximum, mean and median spending under each of the categories was as follows:

<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>150</td>
<td>21.70</td>
<td>20</td>
</tr>
<tr>
<td>Bus/train fares</td>
<td>60</td>
<td>11.15</td>
<td></td>
</tr>
<tr>
<td>Car parking</td>
<td>10</td>
<td>2.93</td>
<td>3</td>
</tr>
<tr>
<td>Overnight accommodation</td>
<td>800</td>
<td>41.36</td>
<td>20</td>
</tr>
<tr>
<td>Eating out</td>
<td>100</td>
<td>19.04</td>
<td>15</td>
</tr>
<tr>
<td>Food and groceries</td>
<td>100</td>
<td>14.38</td>
<td>10</td>
</tr>
<tr>
<td>Entrance to local visitor attractions</td>
<td>20</td>
<td>5.41</td>
<td>5</td>
</tr>
<tr>
<td>Mooring or transit fees</td>
<td>30</td>
<td>4.50</td>
<td></td>
</tr>
<tr>
<td>Hire of equipment</td>
<td>200</td>
<td>29.00</td>
<td>5</td>
</tr>
<tr>
<td>Maps/guidebooks/leaflets</td>
<td>40</td>
<td>9.07</td>
<td>5</td>
</tr>
<tr>
<td>Gifts/souvenirs</td>
<td>50</td>
<td>8.14</td>
<td>5</td>
</tr>
<tr>
<td>Other</td>
<td>50</td>
<td>10.83</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>1110</strong></td>
<td><strong>63.27</strong></td>
<td><strong>40</strong></td>
</tr>
</tbody>
</table>
Respondents were also asked to record their annual spending on canoeing and kayaking. **Table A12.3** 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 canoeing and kayaking was £250.

Maximum, mean and median spending under each of the categories was as follows:

**Table A12. 3: Canoeing and kayaking – max, mean and median spend per year (£)**

<table>
<thead>
<tr>
<th></th>
<th>Max (£)</th>
<th>Mean (£)</th>
<th>Median (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment</td>
<td>2000</td>
<td>315.86</td>
<td>200</td>
</tr>
<tr>
<td>Storage</td>
<td>240</td>
<td>42.37</td>
<td></td>
</tr>
<tr>
<td>Memberships</td>
<td>235</td>
<td>41.53</td>
<td>39</td>
</tr>
<tr>
<td>Insurance</td>
<td>1800</td>
<td>108.19</td>
<td>42.5</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>2300</strong></td>
<td><strong>361.82</strong></td>
<td><strong>250</strong></td>
</tr>
</tbody>
</table>

These figures exclude the 9 respondents who provided no information on their spending, but include the 1 respondent who stated that they spent nothing during the previous year.
Clubs and codes of conduct

28. Respondents were asked about their membership of clubs and their awareness of codes of conduct.

Club membership

29. Of the 158 people who answered this question around 80% were members of local or national organisations. Examples listed include the British Canoe Union, Scottish Canoe Association, Edinburgh, Glasgow and Inverness Kayak Clubs, the Pentland Canoe Club and North East Sea Kayakers.

Table A12. 4: Canoeing and kayaking – membership of local or national organisations

<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>61</td>
</tr>
<tr>
<td>National organisation</td>
<td>66</td>
</tr>
<tr>
<td>None</td>
<td>31</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>158</strong></td>
</tr>
</tbody>
</table>

Awareness of codes of conduct

30. Canoeist and kayakers were most aware of the Scottish Outdoor Access Code followed by the Scottish Marine Wildlife Watching Code and the Wild Scotland Sea Kayaking Best Practice Guidelines.
Socio-economic profile

Age and gender

31. **Figure A12.15** shows the age and gender profile of all those who indicated that they had taken part in canoeing and kayaking during the past 12 months. This is as distinct from those who included these as one of their most important activities. Comparison with the whole survey sample (Figure 3.166) suggests canoeists and kayakers were more likely to be male and in the 25 to 34 and 35 to 44 age bands than the survey sample as a whole.

32. **Figure A12.16** shows the age and gender profile of those who identified canoeing or kayaking as one of their most important activities. The age and gender profile is significantly different from the larger samples, indicating that canoeing and kayaking is particularly important for men between the ages of 45 and 65.
Household income

33. Analysis of respondents’ household income suggests over 60% of canoeists and kayakers have incomes of £26,000 or more. This indicates incomes higher than the Scottish household average (2014) of around £23,000.

Business survey findings

34. 64 of the 279 respondents in the business survey stated that their business serves canoeing and kayaking. Figure A12.18 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 A12.18: Distribution of the businesses across Marine Regions

Figure A12.19 shows the services provided by businesses serving canoeing and kayaking.

Figure A12.19: Services provided by businesses serving canoeing and kayaking

35. Business respondents were asked to indicate the kinds of services they provide. Figure A12.19 shows the services provided by businesses serving canoeing and kayaking.