Appendix 13
Rowing and sculling in the sea

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Appendix 13
Rowing and sculling in the sea

Table A13.1: 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 rowing and sculling 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 237 people provided spatial information on rowing and sculling, representing around 10% of the total sample. An additional 26 clubs provided spatial information on rowing and sculling. 104 people identified rowing and sculling as one of their most important activities, representing around 4% of the total sample. These are relatively 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 43% of those who provided spatial data on rowing and sculling identified it as one of their most important activities.

5. Based on the sample of people who provided spatial information, around 78% of respondents lived within a mile of the Scottish coastline, 10% between one and five miles and 6% more than five miles. The remaining 5% of respondents came from outside Scotland. This reflects the focus of this activity within coastal communities.
in Scotland. The Scottish Coastal Rowing Association holds information on the location of St Ayles Skiff rowing clubs around the Scottish coast\textsuperscript{39}.

Spatial data

6. People completing the survey identified 441 areas they had been rowing or sculling. This information has been used to generate a heat map showing the concentration of activity around the Scottish coast (see Map A13.1). \textbf{Map A13.2} shows the spatial information provided by club survey responses. The maps show a concentration of activity within the Firth of Forth, Moray Firth and Loch Broom. These maps are available on Marine Scotland’s National Marine Plan Interactive (NMPi) website (https://marinescotland.atkinsgeospatial.com/nmpi/).

7. \textbf{Figure A13.1} shows the percentage distribution of rowing and sculling across Marine Regions. It shows that absolute numbers were by far the highest in the Forth and Tay Marine Region, with the Clyde, West Highland and Moray Firth Marine Regions following some way behind. Comparison with the whole survey sample suggests rowing and sculling was relatively concentrated in the these four Marine Regions, along with the Shetland Marine Region.

\textbf{Figure A13.1: Rowing and sculling – spread of activity across Marine Regions}

\textsuperscript{39} http://scottishcoastalrowing.org/club-finder/
Map A13.1: Rowing and sculling (237 individual responses)
Map A13.2: Rowing and sculling (26 club responses)
Trip planning

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

Factors influencing decisions on where to go

9. The most important factors influencing decisions on where to go rowing or sculling include the suitability of the location for rowing, presence of attractive scenery 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.

Figure A13.2: Rowing and sculling – factors influencing where to go

Sources of information

10. Clubs and associations are the most importance sources of information for people rowing or sculling. Also important are people’s own knowledge of the Scottish coastline, recommendations from friends and family and websites.
Characteristics of trip to the coast

Transport to start point

11. Car is by far the most common mode of transport to the start of people’s visit to the coast, with around 50% of respondents indicating they always travel that way, and a further 40% indicating they sometimes go by car. Around 70% of people indicate that they always or sometimes walk, while 50% cycle (always or sometimes). Around half of people sometimes use a ferry as part of their journey. Small numbers travel by bus or train.
Monthly profile of activity

12. **Figure A13.5** shows the frequency of rowing and sculling activity across each month of the year. While there is a peak in activity during the summer months, around 60% of the sample take part at least once a week throughout the year.

![Seasonality - Rowing and sculling](image1)

**Figure A13.5: Rowing and sculling – seasonality**

Trip length

13. Rowers and scullers made an average of around 7 day trips, 1.7 short breaks and 0.4 longer breaks per year. This represents a larger number of day trips but fewer short and longer breaks than the average for the survey sample as a whole.

![Type and length of trip](image2)
Figure A13.6: Rowing and sculling – type and length of trip

14. The sample of 104 respondents accounts for a minimum of around 660 day trips, 159 short breaks and 34 longer breaks.

![Bar chart showing total number of trips taken by sample](chart.png)

Figure A13.7: Rowing and sculling – total number of trips

Accommodation used

15. People provided information on the types of accommodation they typically use. Camping is by far the most popular type of accommodation for people rowing and sculling.
16. The most common area for improvement cited by people rowing or sculling was parking and access followed by the provision of facilities such as places for changing.
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 A13.10 suggests that rowers and scullers are most likely to be with club members or friends and, not surprisingly, least likely to be on their own.

![Who was with you?](image)

**Figure A13.10: Rowing and sculling – party**

Age groups and gender composition of party

19. Respondents were also asked about the age and gender composition of their party. Figure A13.11 shows that rowers and scullers tend to be in much 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 similar proportions of men and women.
Spending

20. 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

21. Table A13.2 shows the maximum, mean and median daily spending against a series of headings. This analysis suggests a median spend of around £15 per day during rowing and sculling trips to the coast.

22. These figures exclude 2 respondents who provided no information on their spending, but include the 27 respondents who stated that they spent nothing during their trip.

23. Maximum, mean and median spending under each of the categories was as follows:
Table A13.2: Rowing and sculling – max, mean and median spend per trip (£)

<table>
<thead>
<tr>
<th>Item</th>
<th>Max (£)</th>
<th>Mean (£)</th>
<th>Median (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Petrol/diesel/LPG</td>
<td>60</td>
<td>14.32</td>
<td>10</td>
</tr>
<tr>
<td>Bus/train fares</td>
<td>1</td>
<td>0.16</td>
<td>0</td>
</tr>
<tr>
<td>Car parking</td>
<td>15</td>
<td>3.54</td>
<td>2</td>
</tr>
<tr>
<td>Overnight accommodation</td>
<td>120</td>
<td>38.43</td>
<td>25</td>
</tr>
<tr>
<td>Eating out</td>
<td>70</td>
<td>23.06</td>
<td>20</td>
</tr>
<tr>
<td>Food and groceries</td>
<td>40</td>
<td>13.59</td>
<td>10</td>
</tr>
<tr>
<td>Entrance to local visitor attractions</td>
<td>30</td>
<td>6.70</td>
<td>5</td>
</tr>
<tr>
<td>Mooring or transit fees</td>
<td>10</td>
<td>4.38</td>
<td>5</td>
</tr>
<tr>
<td>Hire of equipment</td>
<td>4</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Maps/guidebooks/leaflets</td>
<td>10</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Gifts/souvenirs</td>
<td>20</td>
<td>9.72</td>
<td>10</td>
</tr>
<tr>
<td>Other</td>
<td>20</td>
<td>6.18</td>
<td>5</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>310</strong></td>
<td><strong>42.56</strong></td>
<td><strong>15</strong></td>
</tr>
</tbody>
</table>

Figure A13.12: Rowing and sculling – mean and median spend per day
Spend per year by category

24. Respondents were also asked to record their annual spending on rowing and sculling. Table A13.3 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 rowing and sculling was £80. These figures exclude the 5 respondents who provided no information on their spending.

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

Table A13.3: Rowing and sculling – max, mean and median spend per year (£)

<table>
<thead>
<tr>
<th>Category</th>
<th>Max (£)</th>
<th>Mean (£)</th>
<th>Median (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment</td>
<td>500</td>
<td>89.42</td>
<td>50</td>
</tr>
<tr>
<td>Storage</td>
<td>200</td>
<td>60</td>
<td>50</td>
</tr>
<tr>
<td>Memberships</td>
<td>385</td>
<td>51.69</td>
<td>35</td>
</tr>
<tr>
<td>Insurance</td>
<td>150</td>
<td>49.17</td>
<td>25</td>
</tr>
<tr>
<td>TOTAL</td>
<td>785</td>
<td>124.31</td>
<td>80</td>
</tr>
</tbody>
</table>

Figure A13.13: Rowing and sculling – mean and median spend per year

Clubs and codes of conduct

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

27. Of the 101 people who answered this question, all but one were members of local or national organisations. The majority were members of local rowing clubs including Pittenweem Rowing Club, Eskmuthe Coastal Rowing Club – Musselburgh, Mid Argyll Coastal Rowing Club and the Girvan Coastal Rowing Club, with the Scottish Coastal Rowing Association mentioned on a number of occasions.

Table A13.4: Rowing and sculling – membership of local or national organisations

<table>
<thead>
<tr>
<th>Do you belong to any clubs, associations or governing bodies relating to coastal recreation?</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Local organisation</td>
<td>77</td>
</tr>
<tr>
<td>National organisation</td>
<td>23</td>
</tr>
<tr>
<td>None</td>
<td>1</td>
</tr>
<tr>
<td>Grand Total</td>
<td>101</td>
</tr>
</tbody>
</table>

Awareness of codes of conduct

28. Rowers and scullers were most aware of the Scottish Outdoor Access Code, followed by the Scottish Marine Wildlife Watching Code and the Personal Watercraft Guidelines.

Figure A13.14: Rowing and sculling – codes of conduct
Socio-economic profile

Age and gender

29. **Figure A13.5** shows the age and gender profile of all those who indicated that they had taken part in rowing and sculling 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 suggests rowers and scullers were more likely to be in the 35 to 44 and 45 to 65 age bands, largely as a result of increased proportions of women in these categories.

30. **Figure A13.16** shows the age and gender profile of those who identified rowing and sculling as one of their most important activities. This shows an even greater proportion of women between the ages of 45 and 65, with this group accounting for just over 40% of the sample (compared with around 16% for the whole survey sample).

![Figure A13.15: Age and gender of all participating in rowing and sculling](image)

![Figure A13.16: Age and gender profile of those who identified of rowing and sculling as a main activity](image)
Household income

31. Analysis of respondents’ household income suggests over 40% of people rowing and sculling have incomes of £26,000 or more. This indicates incomes a little higher than the Scottish household average (2014) of around £23,000.

![Figure A13.17: Rowing and sculling – household income](image)

Business survey findings

32. 27 of the 279 respondents in the business survey stated that their business serves rowing and sculling. Figure A13.18 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 A13.18: Distribution of the businesses across Marine Regions](image)
33. Business respondents were asked to indicate the kinds of services they provide. Figure A13.19 shows the services provided by businesses serving rowing and sculling.

Figure A13.19: Services provided by businesses serving rowing and sculling