People made an average of 5.95 day trips, 1.99 short breaks and 1.39 longer breaks per year. The average party size was estimated at around 4.5 people, with slightly more males than females.

Analysis of survey respondents’ spending suggests a median expenditure of around £55 per day during recreation and tourism trips on the Scottish coast and in the marine environment. Most, but not all, of this is likely to be spent in coastal communities.

BUSINESS SURVEY RESULTS

A total of 279 businesses responded to the business survey. The largest proportion of respondent businesses provide organised or led excursions on the coast or at sea, followed by instruction / training and the hire or charter of boats. 60% operate all year round, with the remaining 40% most active between April and October. The survey suggests that the sector is optimistic with most anticipating growth in turnover over the next five years. The most positive outlook was reported by businesses running excursions, training and hiring or chartering equipment including boats.

ECONOMIC VALUE

Information on daily spending levels were used in conjunction with data on the total number of trips to the Scottish coastline (derived from the Scotland’s People and Nature Survey (SPANS) national omnibus survey) to estimate the total expenditure associated with the sector. Taking all 23 activities covered by the survey, the analysis suggests that annual expenditure on marine recreation and tourism activities is estimated to amount to £3.7 billion to the Scottish economy. Around £2.4 billion of this is associated with general recreation and tourism, with around £1.3 billion associated with more specialist activities including wildlife watching, sailing, kayaking, surfing and angling.

NOTE ON INTERPRETING RESULTS

Some caution needs to be exercised in the interpretation of these figures since the nature of the survey sample is probably biased towards higher spending participants. Nevertheless, the findings highlight the vital economic contribution recreation and tourism makes to Scotland’s marine economy alongside other key sectors such as fishing, renewable energy and oil and gas.
How easy it is to find staff with skills necessary to support your business?

SURVEY DESIGN

The survey design and method for data collection means the survey results are not representative of all marine recreation and tourism activities in Scotland, particularly in more remote areas, and information on activities with fewer participants is not to be taken as an indication that no activity takes place.

RESPONSES

Almost 2500 responses were collected. Over the last 12 months most people indicated that they took part in 3 or more activities. When mapping where this activity took place most gave 6 or more places they had been.

RESULTS

When asked about the factors influencing their decision about where to go, respondents said the most important factors included the suitability of the location for their activities, the presence of attractive scenery and the possibility of seeing wildlife.

Cultural heritage and facilities, such as pubs and restaurants were factors of secondary importance; availability of suitable accommodation was of relatively low significance. The survey results suggest that people value a range of ‘ecosystem services’ provided by the marine and coastal environment, a finding which may be worth addressing in further research.

Around 65% of respondents indicated that they always travelled by car to the start of their visit to the coast. However, around 60% of people said that they always or sometimes walk - reflecting the high proportion of respondents who live within 1 miles of the Scottish coast, while 40% sometimes use a ferry as part of their journey.

People made an average of 5.95 day trips, 1.99 short breaks and 1.39 longer breaks per year. The average party size was estimated at around 4.5 people, with slightly more males than females.

Analysis of survey respondents’ spending suggests a median expenditure of around £55 per day during recreation and tourism trips on the Scottish coast and in the marine environment. Most, but not all, of this is likely to be spent in coastal communities.

BUSINESS SURVEY RESULTS

A total of 279 businesses responded to the business survey. The largest proportion of respondent businesses provide organised or led excursions on the coast or at sea, followed by instruction / training and the hire or charter of boats. 60% operate all year round, with the remaining 40% most active between April and October. The survey suggests that the sector is optimistic with most anticipating growth in turnover over the next five years. The most positive outlook was reported by businesses running excursions, training and hiring or chartering equipment including boats.

ECONOMIC VALUE

Information on daily spending levels were used in conjunction with data on the total number of trips to the Scottish coastline (derived from the Scotland’s People and Nature Survey (SPANS) national omnibus survey) to estimate the total expenditure associated with the sector. Taking all 23 activities covered by the survey, the analysis suggests that annual expenditure on marine recreation and tourism activities is estimated to amount to £3.7 billion to the Scottish economy. Around £2.4 billion of this is associated with general recreation and tourism, with around £1.3 billion associated with more specialist activities including wildlife watching, sailing, kayaking, surfing and angling.

NOTE ON INTERPRETING RESULTS

Some caution needs to be exercised in the interpretation of these figures since the nature of the survey sample is probably biased towards higher spending participants. Nevertheless, the findings highlight the vital economic contribution recreation and tourism makes to Scotland’s marine economy alongside other key sectors such as fishing, renewable energy and oil and gas.
How easy it is to find staff with skills necessary to support your business?

SURVEY DESIGN

The survey design and method for data collection means the survey results are not representative of all marine recreation and tourism activities in Scotland, particularly in more remote areas, and information on activities with fewer participants is not to be taken as an indication that no activity takes place.

RESPONSES

Almost 2500 responses were collected. Over the last 12 months most people indicated that they took part in 3 or more activities. When mapping where this activity took place most gave 6 or more places they had been.

RESULTS

When asked about the factors influencing their decision about where to go, respondents said the most important factors included the suitability of the location for their activities, the presence of attractive scenery and the possibility of seeing wildlife.

Cultural heritage and facilities, such as pubs and restaurants were factors of secondary importance; availability of suitable accommodation was of relatively low significance. The survey results suggest that people value a range of ‘ecosystem services’ provided by the marine and coastal environment, a finding which may be worth addressing in further research.

Around 65% of respondents indicated that they always travelled by car to the start of their visit to the coast. However, around 60% of people said that they always or sometimes walk - reflecting the high proportion of respondents who live within 1 miles of the Scottish coast, while 40% sometimes use a ferry as part of their journey.

People made an average of 5.95 day trips, 1.99 short breaks and 1.39 longer breaks per year. The average party size was estimated at around 4.5 people, with slightly more males than females.

Analysis of survey respondents’ spending suggests a median expenditure of around £55 per day during recreation and tourism trips on the Scottish coast and in the marine environment. Most, but not all, of this is likely to be spent in coastal communities.

BUSINESS SURVEY RESULTS

A total of 279 businesses responded to the business survey. The largest proportion of respondent businesses provide organised or led excursions on the coast or at sea, followed by instruction / training and the hire or charter of boats. 60% operate all year round, with the remaining 40% most active between April and October. The survey suggests that the sector is optimistic with most anticipating growth in turnover over the next five years. The most positive outlook was reported by businesses running excursions, training and hiring or chartering equipment including boats.

How easy it is to find staff with skills necessary to support your business?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Easy</th>
<th>Fairly easy</th>
<th>Quite difficult</th>
<th>Very difficult</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical skills</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer service</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marketing and PR</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ECONOMIC VALUE

Information on daily spending levels were used in conjunction with data on the total number of trips to the Scottish coastline (derived from the Scotland’s People and Nature Survey (SPANS) national omnibus survey) to estimate the total expenditure associated with the sector. Taking all 23 activities covered by the survey, the analysis suggests that annual expenditure on marine recreation and tourism activities is estimated to amount to £3.7 billion to the Scottish economy. Around £2.4 billion of this is associated with general recreation and tourism, with around £1.3 billion associated with more specialist activities including wildlife watching, sailing, kayaking, surfing and angling.

NOTE ON INTERPRETING RESULTS

Some caution needs to be exercised in the interpretation of these figures since the nature of the survey sample is probably biased towards higher spending participants. Nevertheless, the findings highlight the vital economic contribution recreation and tourism makes to Scotland’s marine economy alongside other key sectors such as fishing, renewable energy and oil and gas.
People made an average of 5.95 day trips, 1.99 short breaks and 1.39 longer breaks per year. The average party size was estimated at around 4.5 people, with slightly more males than females.

Analysis of survey respondents’ spending suggests a median expenditure of around £55 per day during recreation and tourism trips on the Scottish coast and in the marine environment. Most, but not all, of this is likely to be spent in coastal communities.

BUSINESS SURVEY RESULTS

A total of 279 businesses responded to the business survey. The largest proportion of respondent businesses provide organised or led excursions on the coast or at sea, followed by instruction / training and the hire or charter of boats. 60% operate all year round, with the remaining 40% most active between April and October. The survey suggests that the sector is optimistic with most anticipating growth in turnover over the next five years. The most positive outlook was reported by businesses associated with renewable energy and oil and gas.

NOTE ON INTERPRETING RESULTS

Some caution needs to be exercised in the interpretation of these figures since the nature of the survey sample is probably biased towards higher spending participants. Nevertheless, the findings highlight the vital economic contribution recreation and tourism makes to Scotland’s marine economy alongside other key sectors such as fishing, renewable energy and oil and gas.

ECONOMIC VALUE

Information on daily spending levels were used in conjunction with data on the total number of trips to the Scottish coastline (derived from the Scotland’s People and Nature Survey (SPANS) national omnibus survey) to estimate the total expenditure associated with the sector. Taking all 23 activities covered by the survey, the analysis suggests that annual expenditure on marine recreation and tourism activities is estimated to amount to £3.7 billion to the Scottish economy. Around £2.4 billion of this is associated with general recreation and tourism, with around £1.3 billion associated with more specialist activities including wildlife watching, sailing, kayaking, surfing and angling.

BACKGROUND

The Scottish Marine Recreation and Tourism Survey (SMRTS), carried out in 2015, was commissioned by the Scottish Government with the aim of filling the data gaps identified by the National Marine Plan. The work was managed by the Firth of Clyde Forum and part funded by The Crown Estate and the Scottish Coastal Forum.

The survey gathered information for 23 different recreation and tourism activities undertaken at sea or around the Scottish coastline and the businesses which support them. This summary provides a very short overview of the results. The final report is available at www.gov.scot/Topics/marine/seamanagement/national/RecandTourism