

Scottish Marine Recreation and Tourism Survey 2015



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Understanding patterns of activity, values and implications for coastal and marine planning

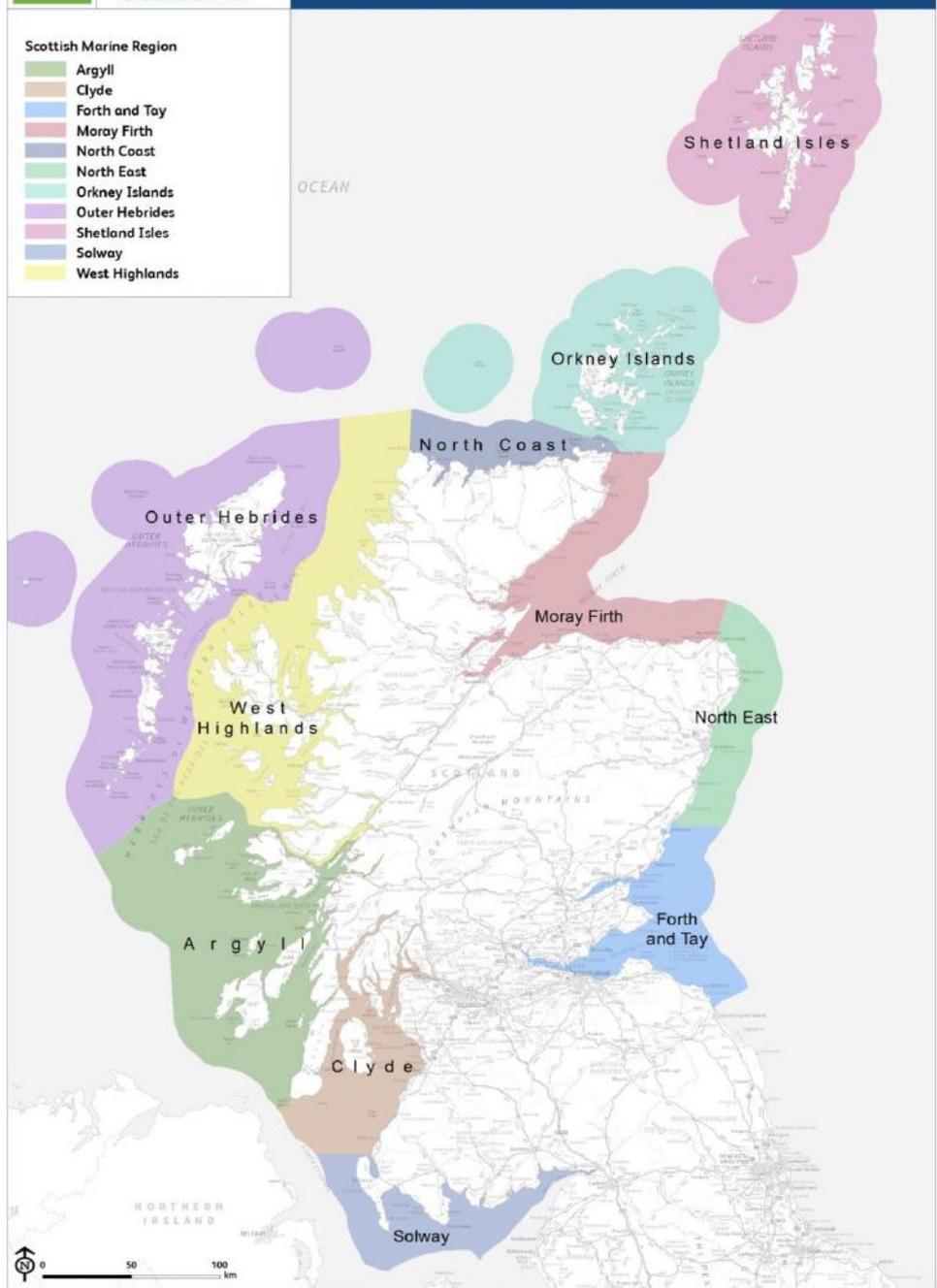


Key messages

- Tourism and recreation activity **can** be quantified and valued effectively – but it isn't easy
- Developed a robust, repeatable and scalable approach to data collection and analysis
- Far stronger understanding of the distribution, nature and value of key activities
 - Holistic picture of the 'sector'
 - Distribution, density of activity and relative importance of areas for key activities
 - Marine recreation and tourism accounts for ~£3billion in expenditure – mostly in rural Scotland
- Providing a critical resource for marine planning – and creative data use

Context

- Marine (Scotland) Act 2010
 - National Marine Plan 2015
 - Regional marine plans – Pentland Firth and Orkney Waters pilot, 2015
- Tourism and recreation identified as key components to Scotland’s rural and marine economy...



The problem...

- Major gaps in understanding regarding:
 - What?
 - Where?
 - Who?
 - Why?
- No consistent, multi-activity spatial data at the national scale
- No robust economic data
 - Supply side
 - Demand side

Partnership and funding

Project partners



with support from



Project design

- **Challenges:**
 - Scale
 - Communications
 - Technology
 - Time
 - (Resource)
- **Opportunities:**
 - Cross-sector support and buy-in
 - High profile, with strong political support (Parliamentary sub-group)

Delivery

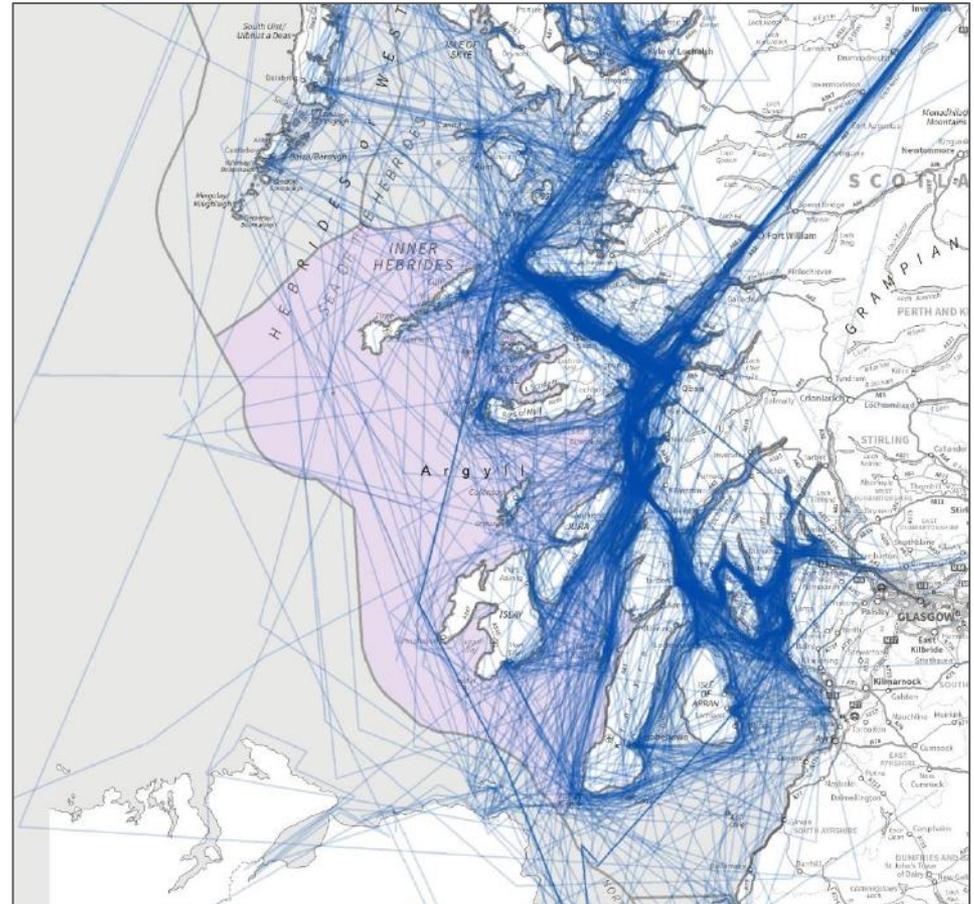
- **Methodology:**
 - Review of existing work
 - Google API-based data collection system
 - *Socio-economic, demographic, motivation and spatial data*
 - *Activity specific: points, lines or polygons*
- **Pentland Firth and Orkney Waters RMP pilot...**
- **Stakeholder engagement**
 - Coastal Forums
 - Eshots, social media, referrals from third-party websites, blogs etc.
 - Print media and presence at key events
 - Three month online survey period (August-October)
 - Regional consultation events – ground-truthing
- **Responses:**
 - Benchmarking response rates...
 - 2,200 individuals
 - 137 clubs / organisations
 - 280 businesses



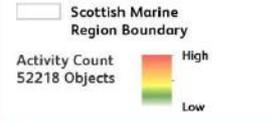
OUTPUTS

'Making sense of the squiggles and dots'

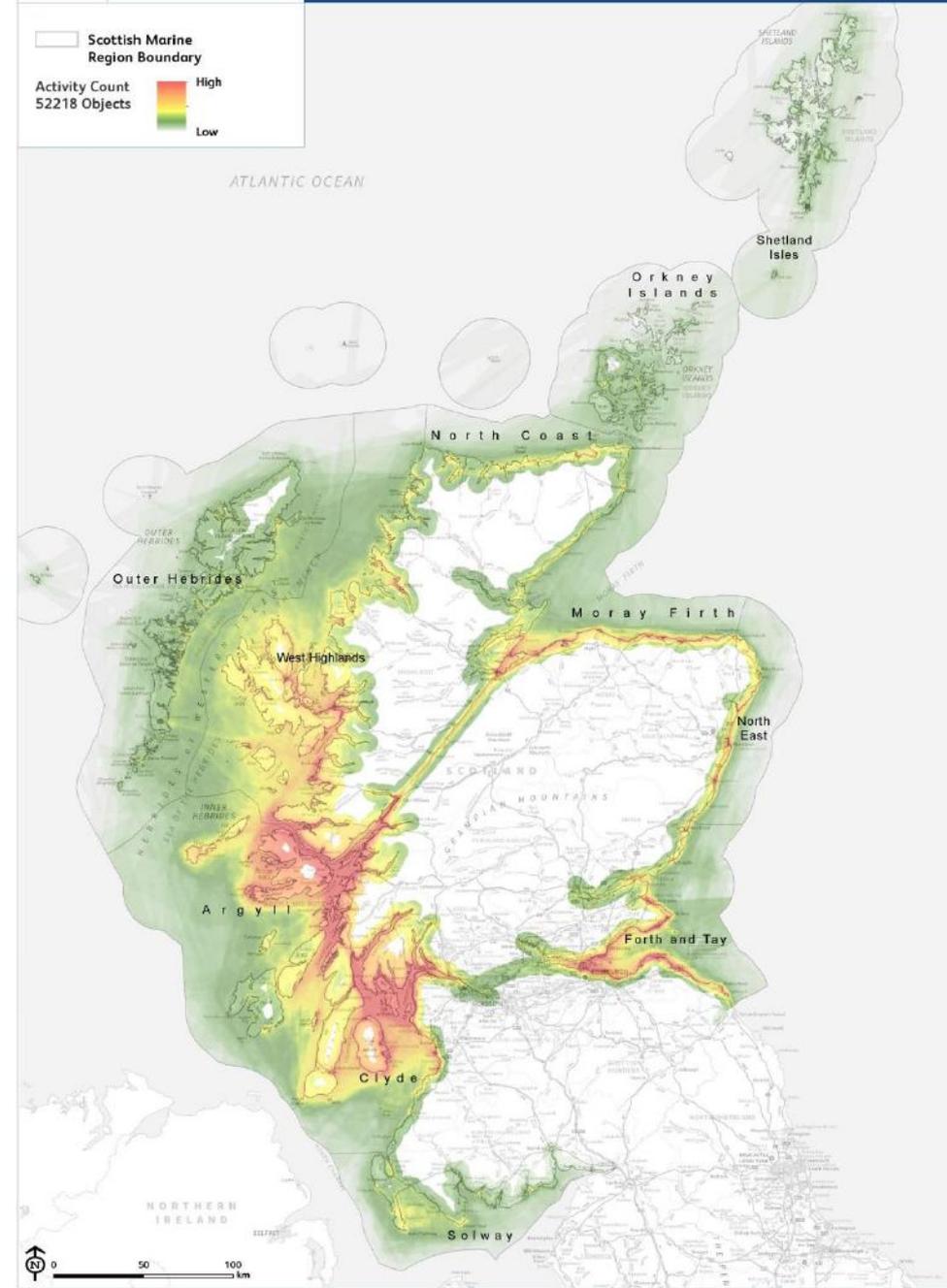
- 2,500 respondents
- 52,000 spatial data entries
- 'Cleaning' data
- Making outputs:
 - Accessible
 - Meaningful
 - Useable



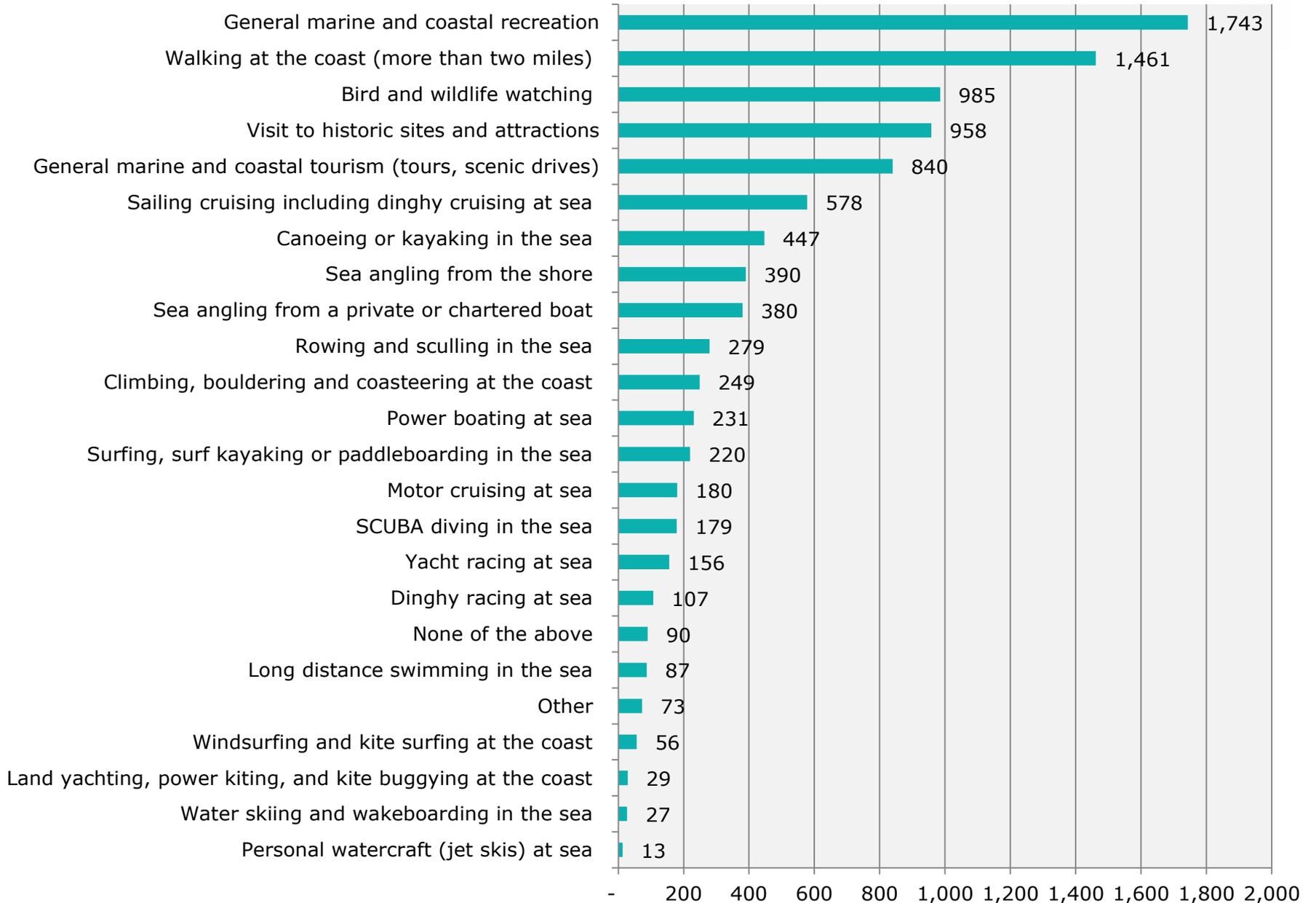
Raw sailing route data provided by respondents
– 500 respondents / 1553 routes



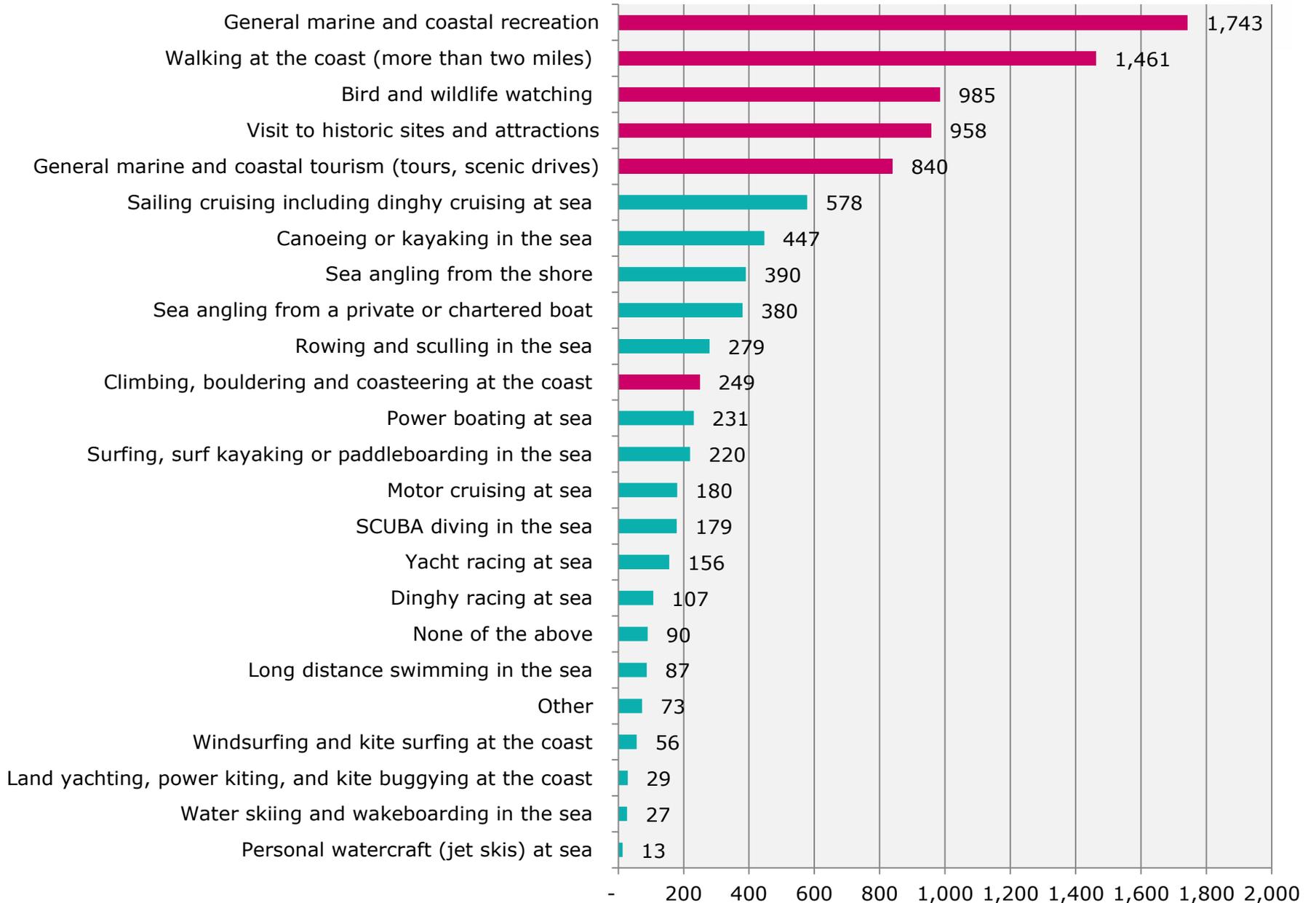
- **Spatial data**
 - Density-based 'heat maps' for reporting
 - Data clipped to 12nm
 - Landward buffers for coastal activities
 - Canal network
- Social, economic, geographic and demographic info on respondents
- Motivations
- Preferences
- Spend



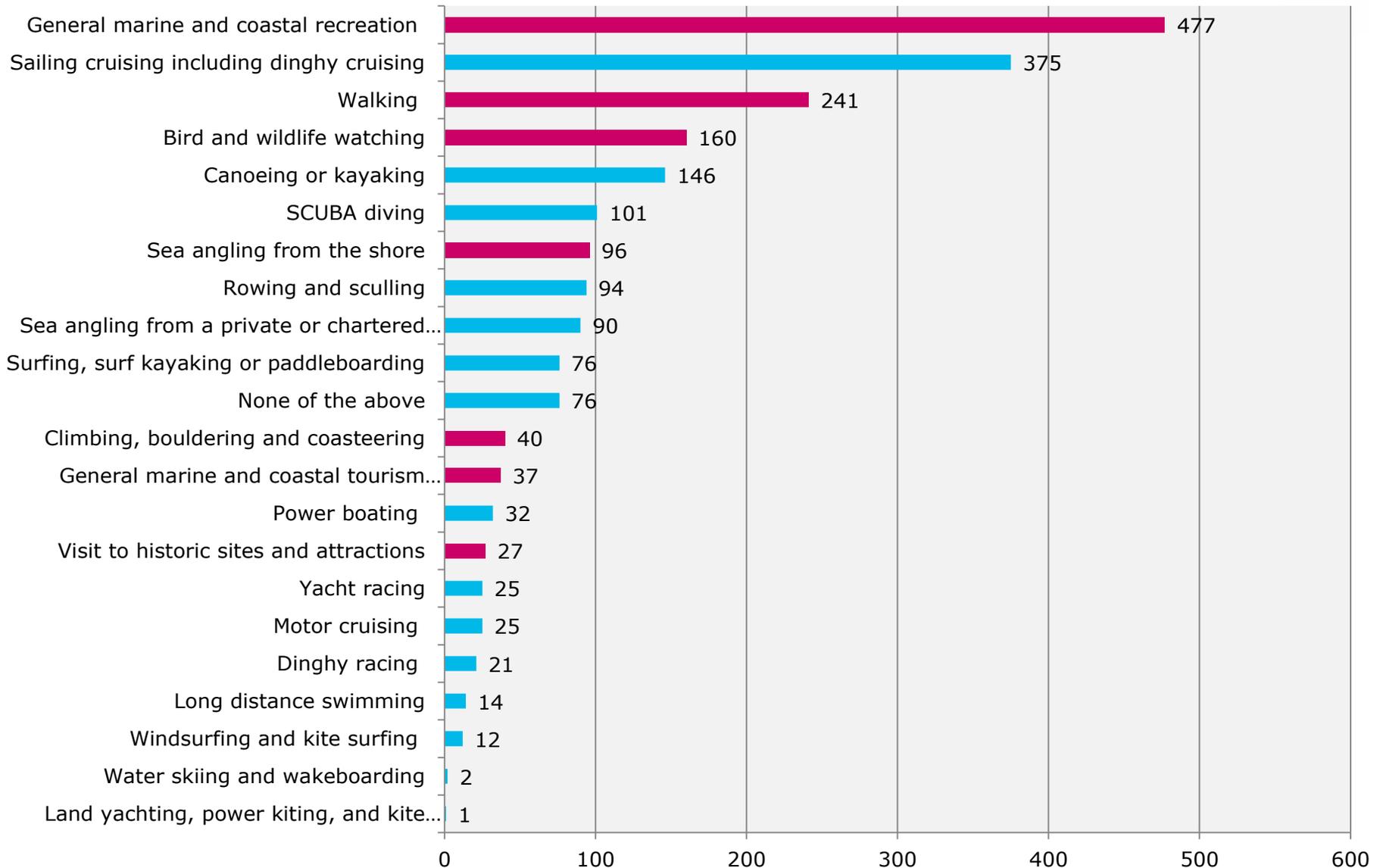
Most frequently-recorded activities



Most frequently-recorded activities

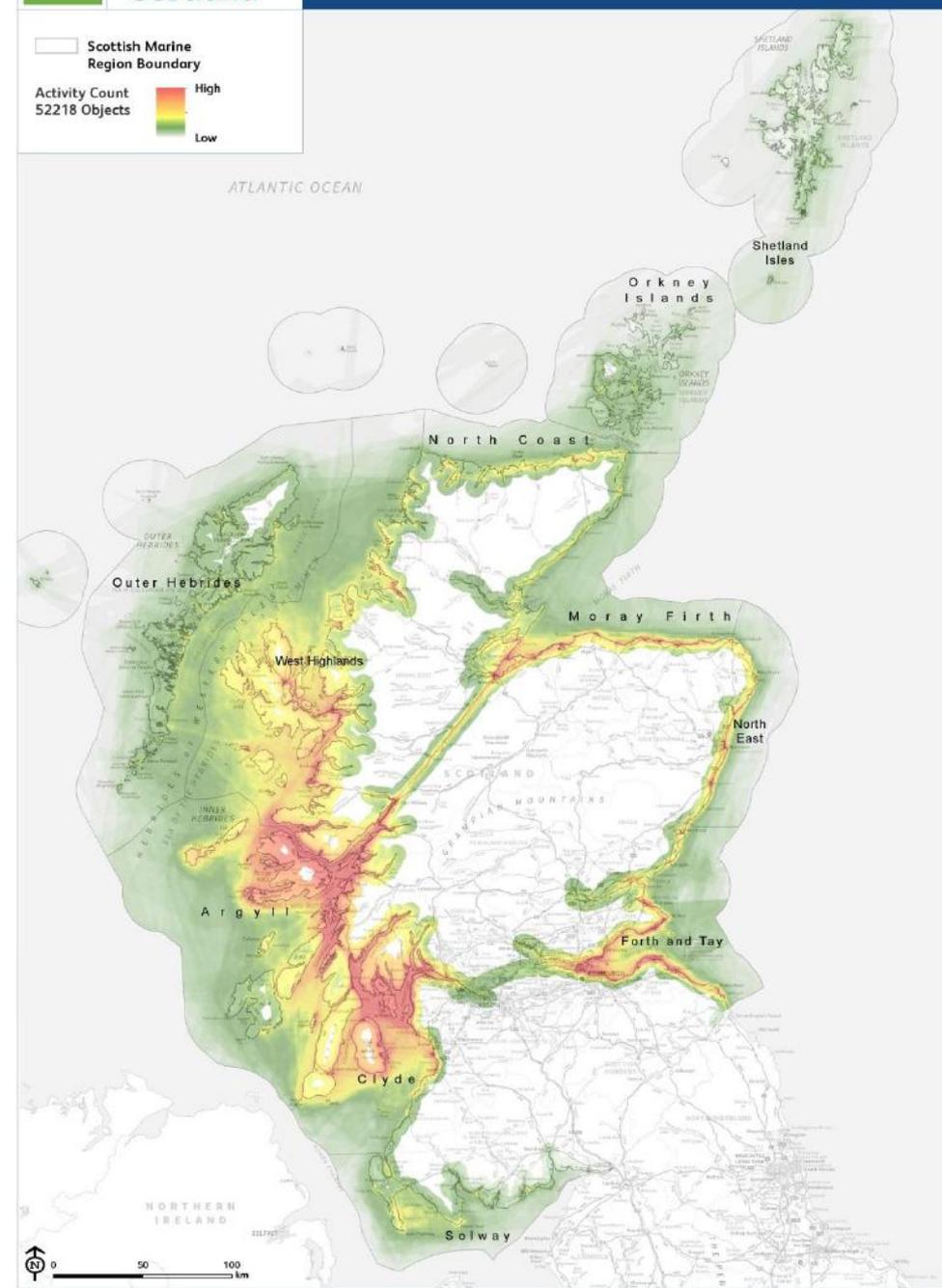


Which single activity is most important to you?



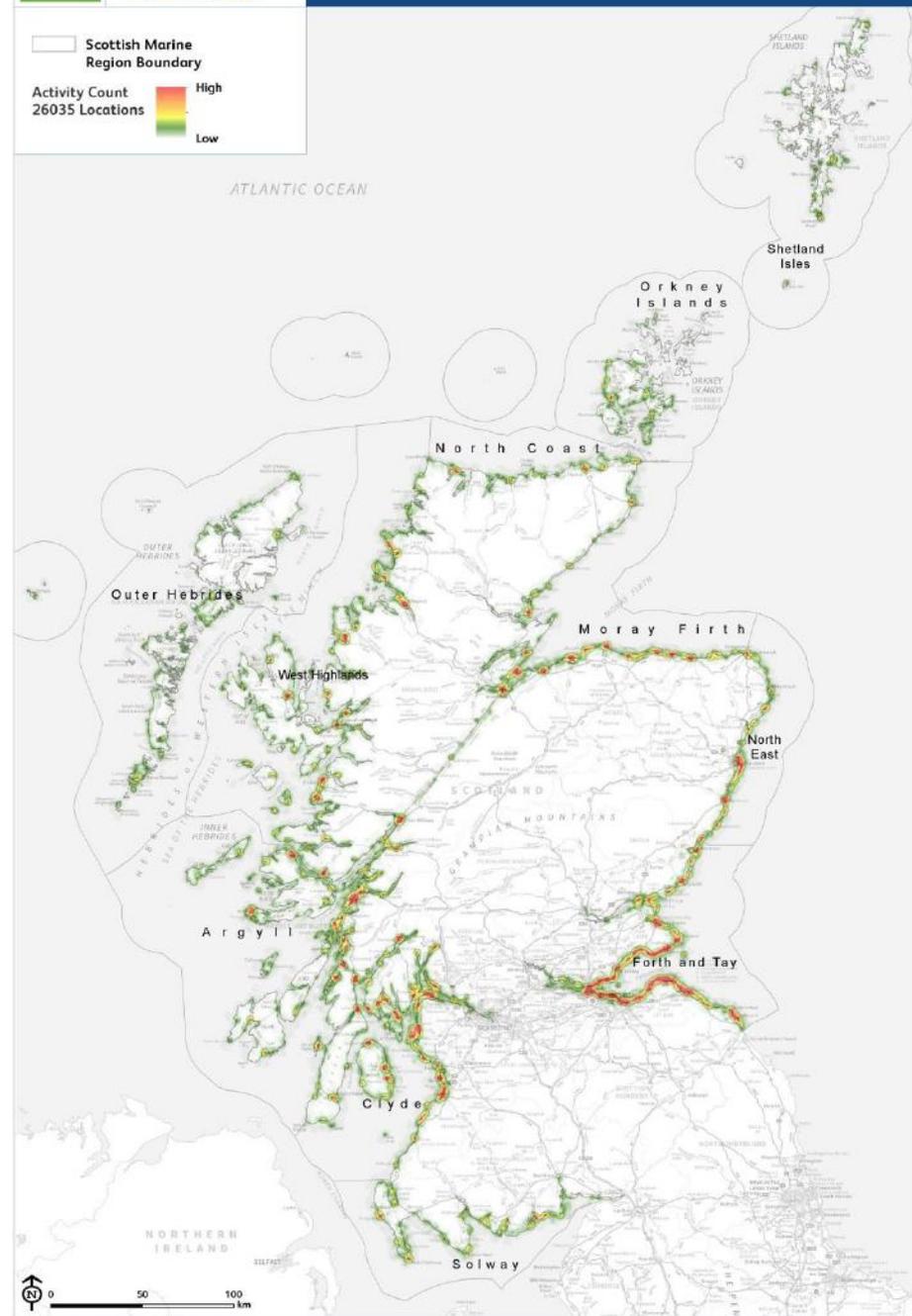
Combined

- Concentrations:
 - Centres of population
 - Accessible coastline
 - Areas of high environmental quality



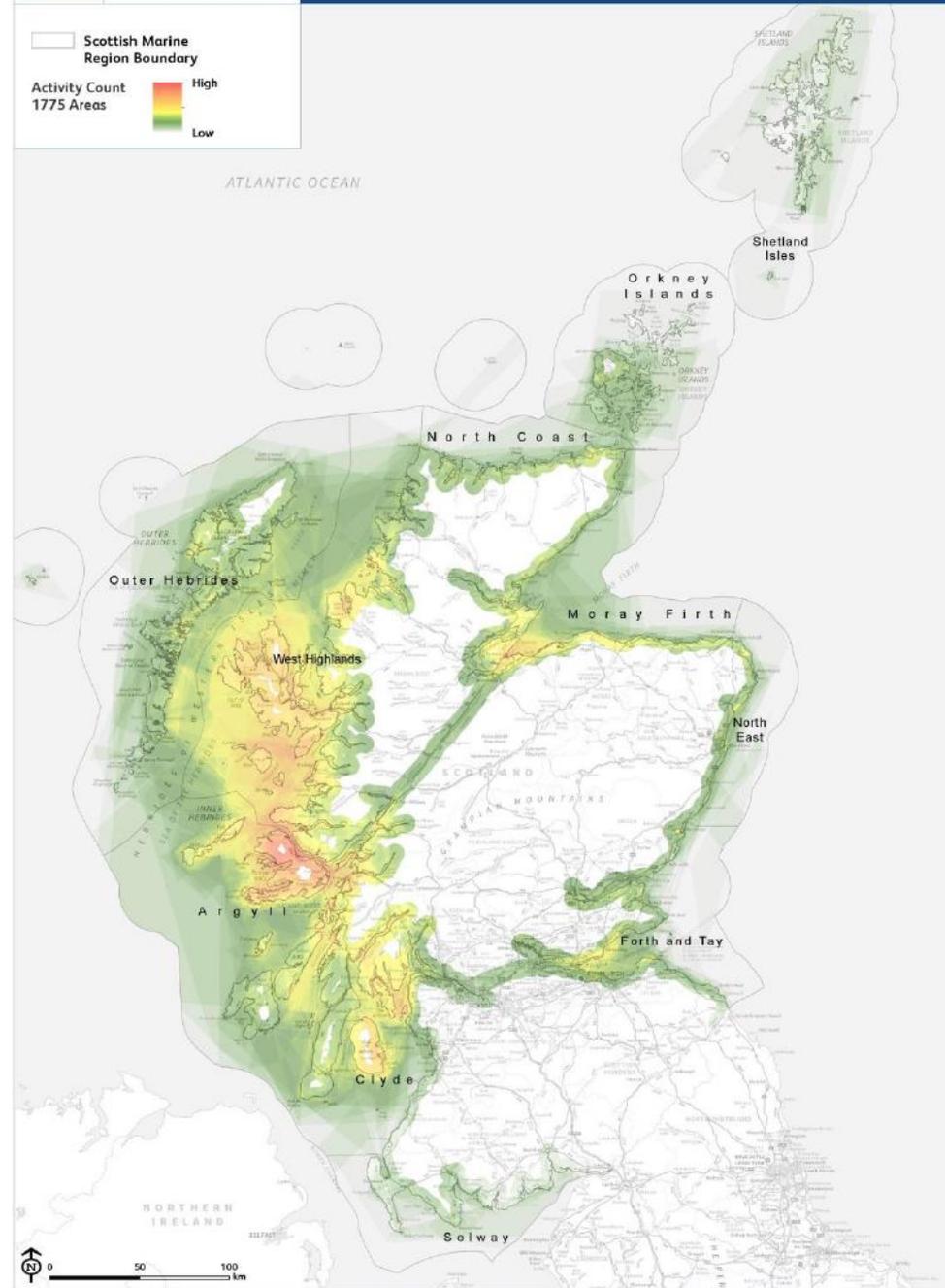
General recreation

- Concentrations:
 - Centres of population
 - Accessible coastline / good quality beaches
 - Areas of high environmental quality



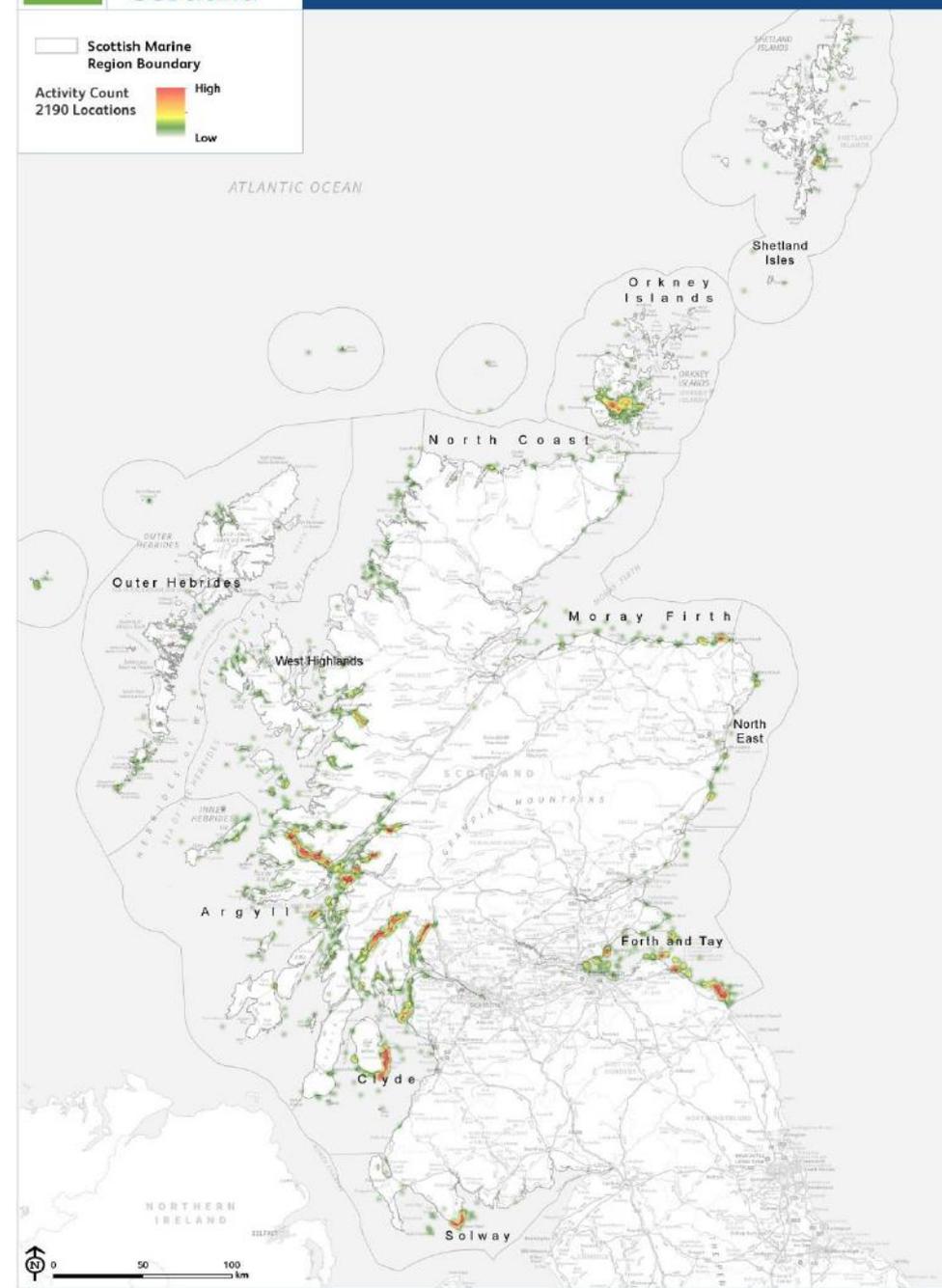
Wildlife

- Effects of specific attractions:
 - Mull: white-tailed eagle
 - Inner Moray Firth: resident bottlenose dolphins
- Surprisingly low rates on the Solway?



SCUBA

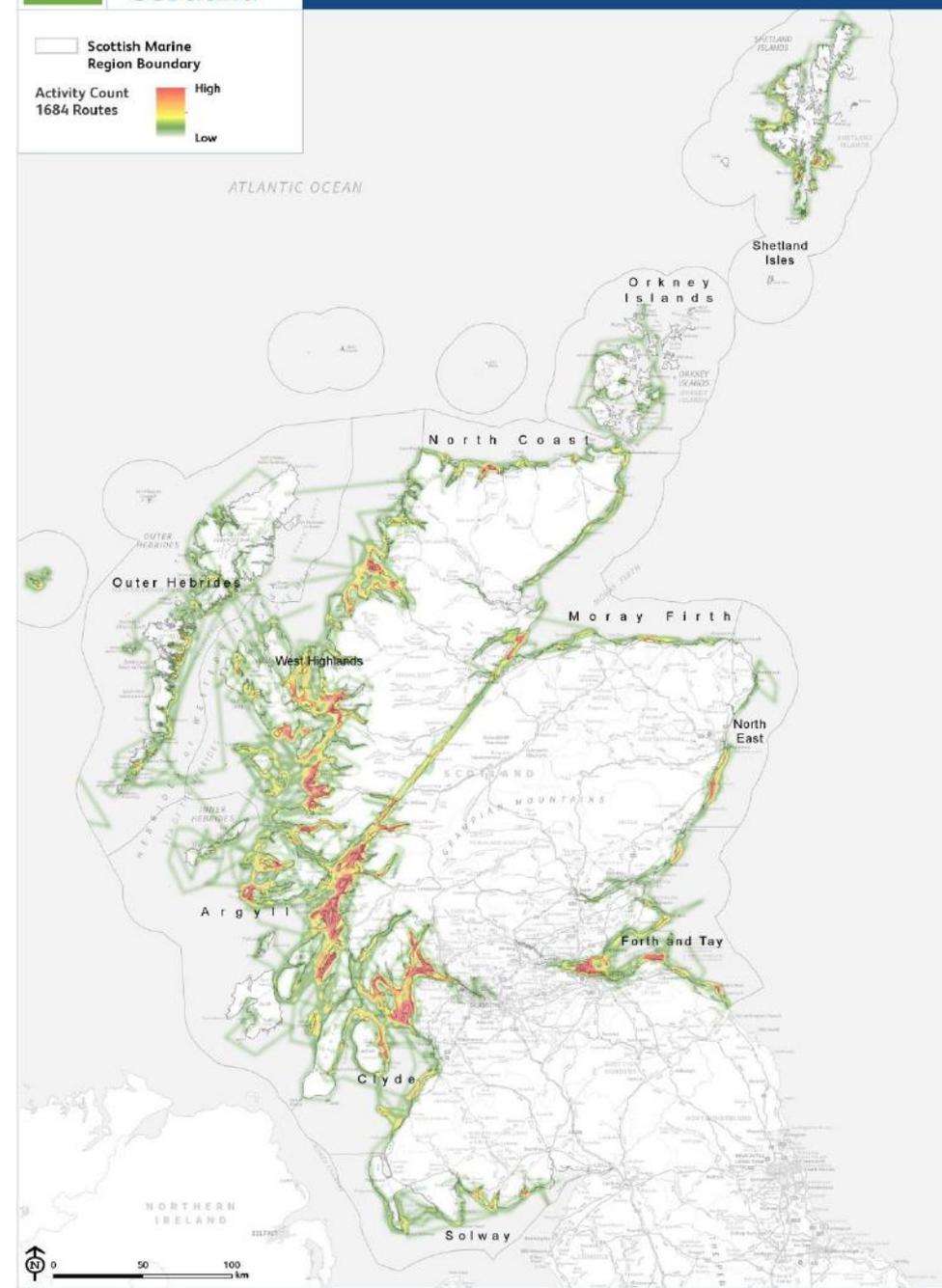
- Effects of specific attractions:
 - Scapa Flow
 - Sound of Mull
 - Argyll and Lochaber sea lochs
 - Arran
 - Firth of Forth



Canoeing / kayaking

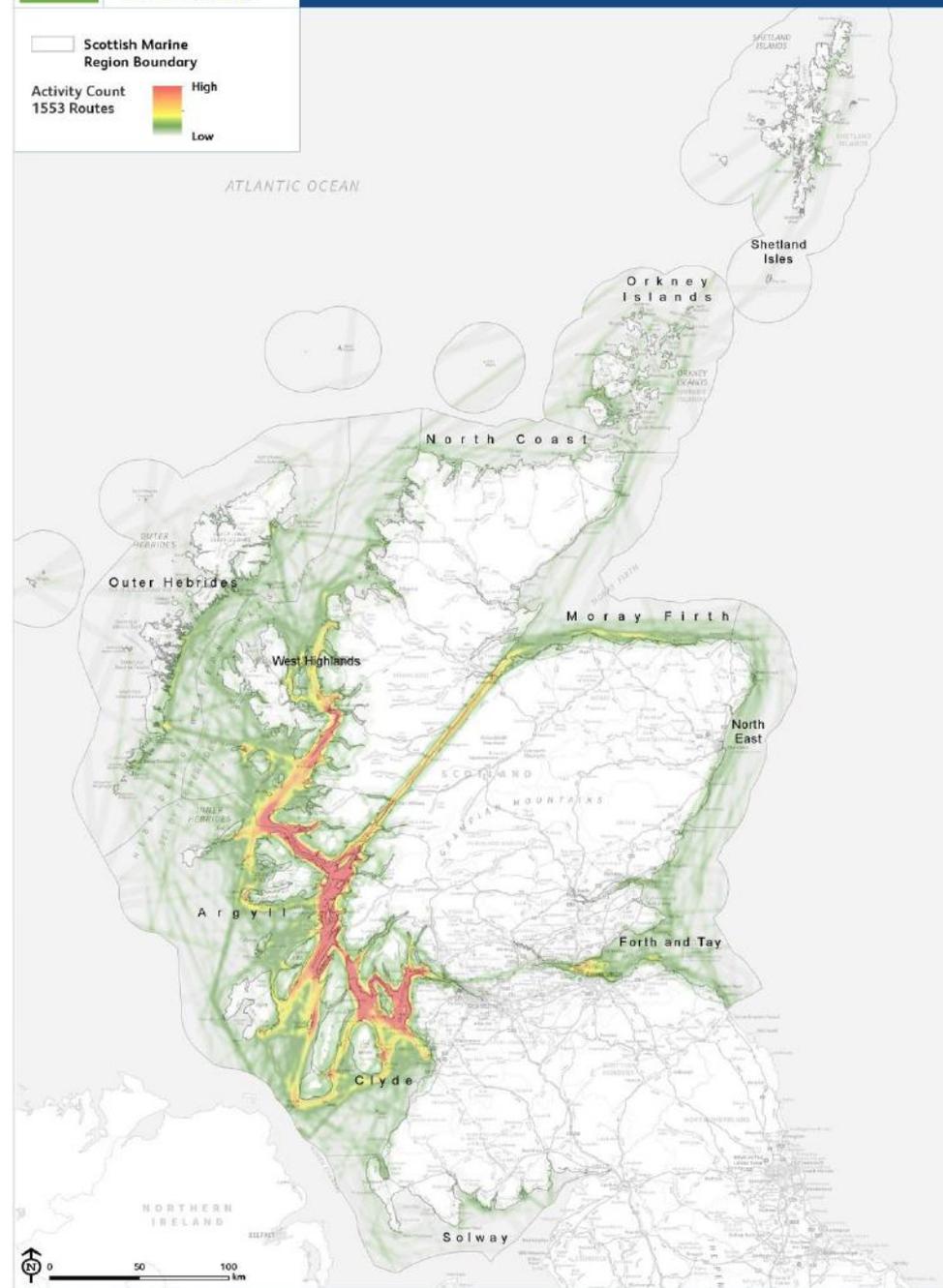
- Inner Hebrides
- Ross and Lochaber
- Argyll

- Crossings / circumnavigations

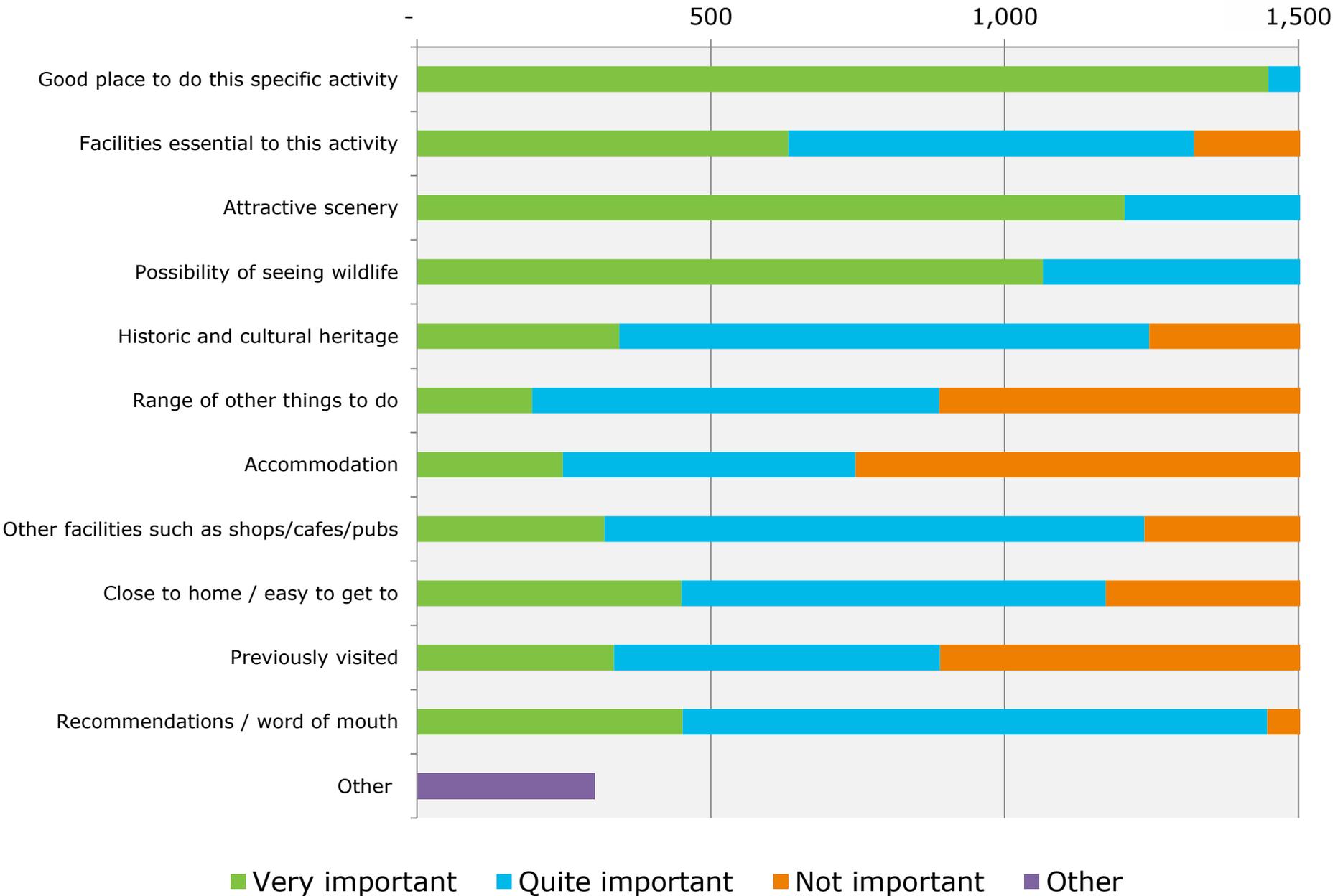


Sailing (cruising)

- Clyde
- Forth
- Inner Hebrides
- Number and frequency of longer crossings
- Value of canal network



Which of the following things are important when you decide where to go for your favourite activity?



Spending patterns

- Median **daily** spend: £55
 - Powerboating, sea angling from boat and general recreation highest spenders (~£90-100/day)
- Median **annual** spend on 'most important activity': £2,000
- Grossed up to national scale:
 - ~£2.4bn general coastal and marine recreation and tourism
 - ~£1.3bn expenditure on specialist activities / sports
- Benchmarks:
 - Overnight tourism trips in Scotland: £4.8bn expenditure (2013)

APPLYING THE DATA

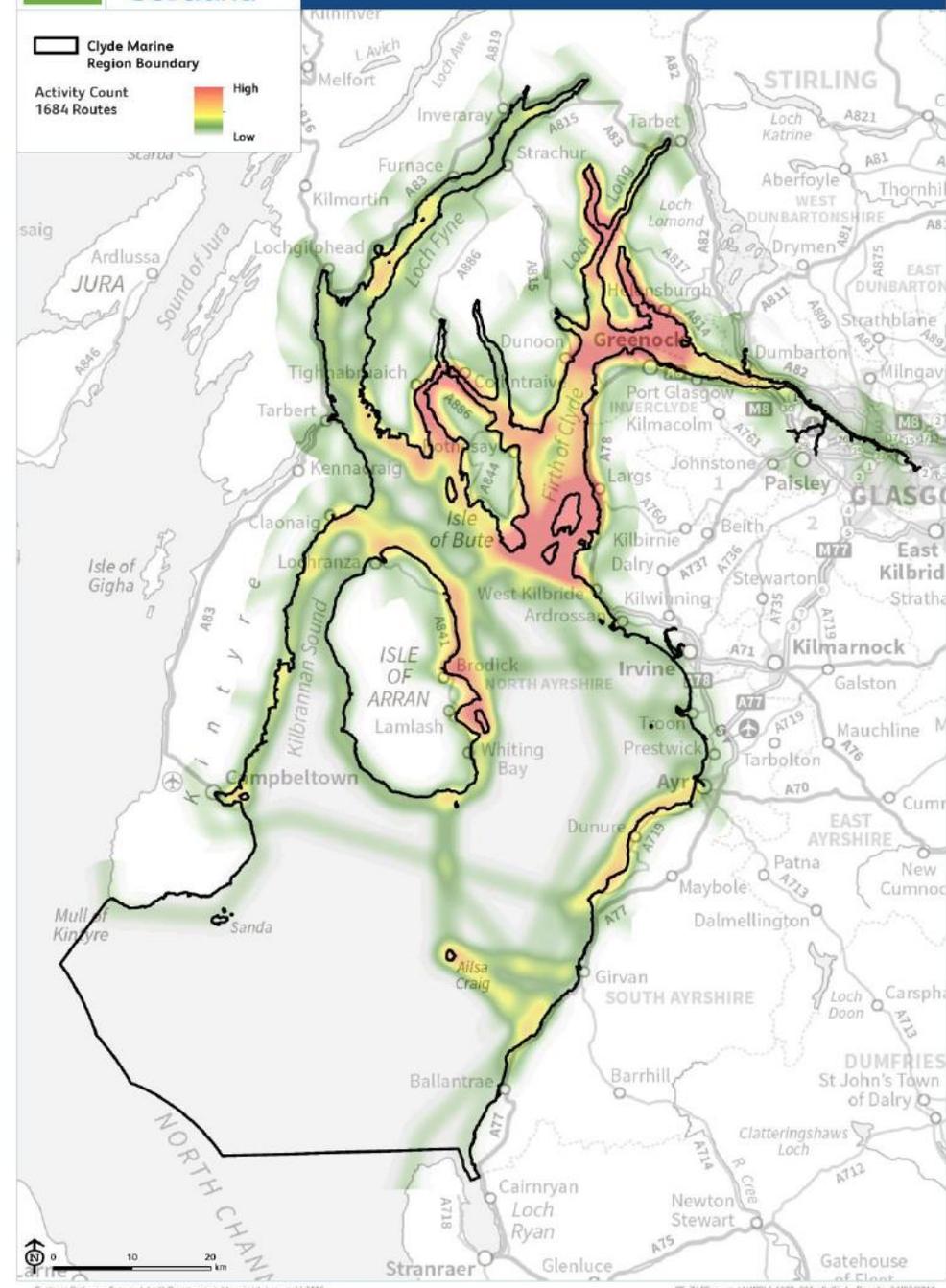


Regional Marine Plans

- Datasets prepared for RMPs, with some health warnings
- Data enables understanding of:
 - Overall patterns of activity
 - Relative intensity of use (regional / national level)
 - Relative significance of activities and overall market
- Clear regional understanding of key activities / markets:
 - Sensitivity to change?

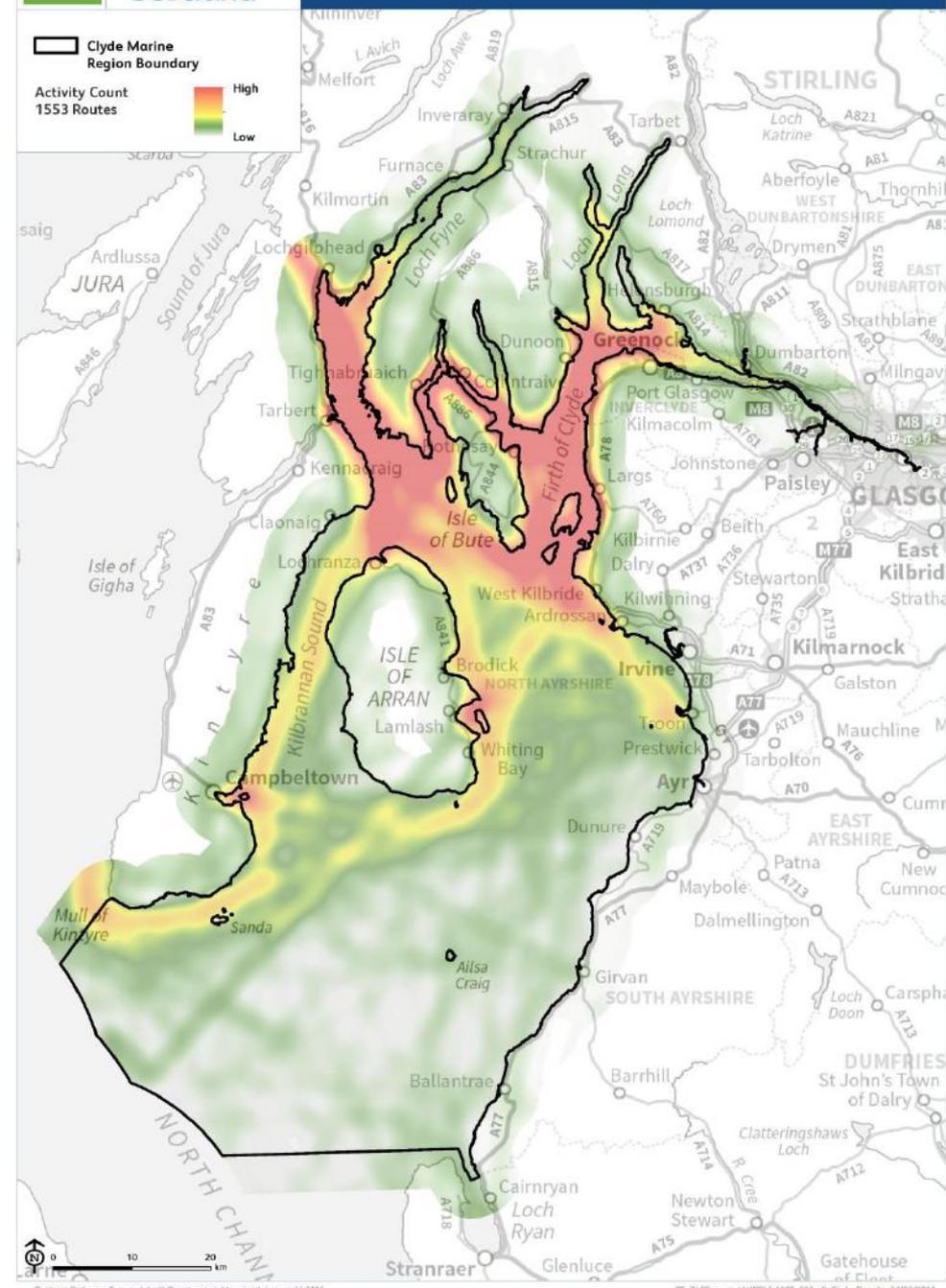
Clyde RMP

- Kayaking:
 - Cumbraes
 - East Arran
 - Kyles of Bute
 - Holy Loch and Loch Long
 - Crossings / circuits



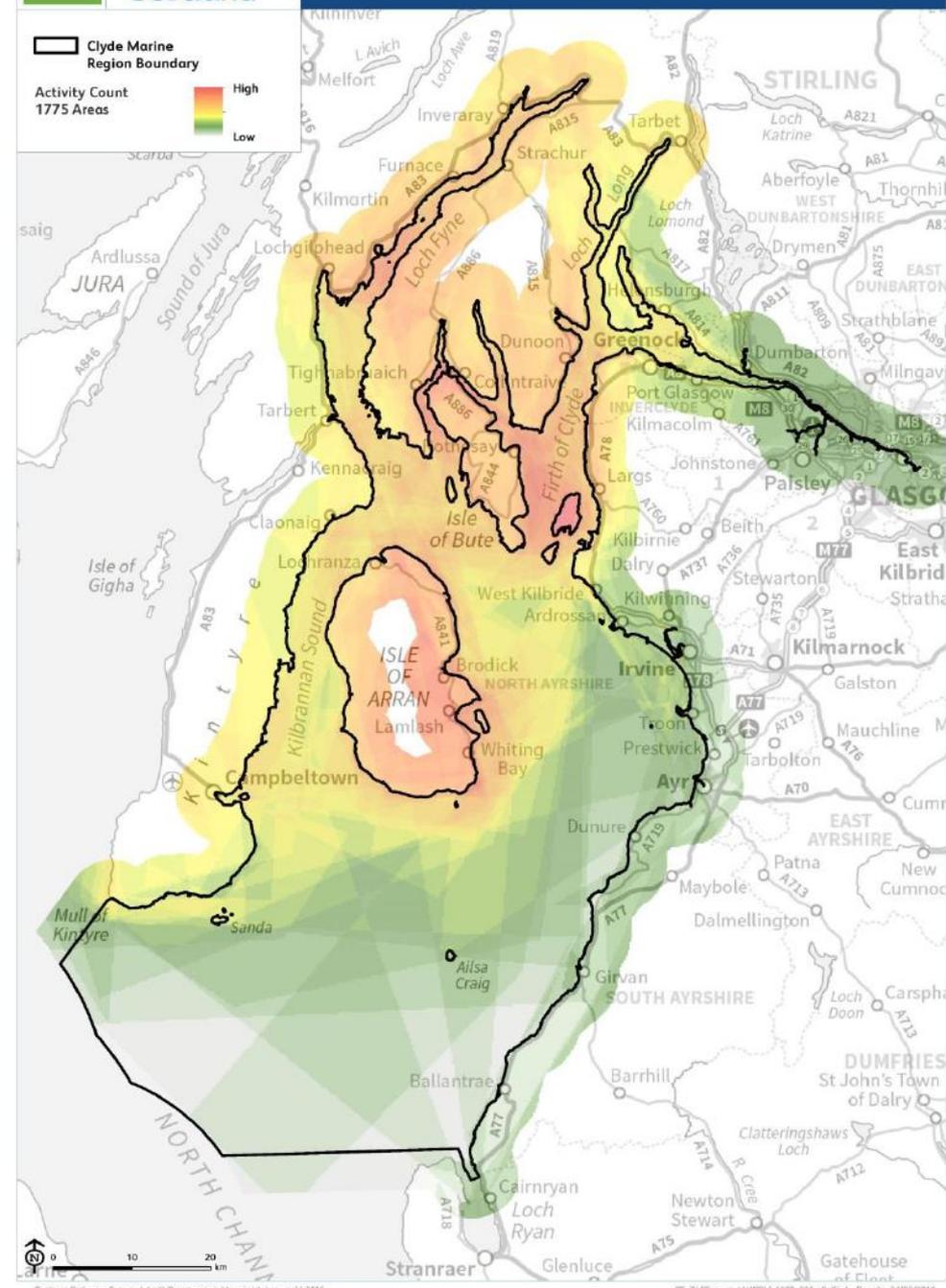
Clyde RMP

- Cruising:
 - Inner Firth
 - Loch Fyne
 - Spot the Crinan Canal...



Clyde RMP

- Wildlife:
 - Cumbræes
 - Bute
 - Arran
 - Loch Fyne



Next steps?

- Data publicly available through NMPI
- Applied individually by Regional Marine Planning Partnerships
 - How?
- Integration with land use planning?
- Economic development?
 - Identifying locations for facilities to support key uses?
- Method and baseline for future iterations (5-yearly?):
 - Identifying / understanding change
 - Monitoring effects / effectiveness of Marine Plans?
 - Recreational pressure on MPAs and other designated assets
- Could be applied elsewhere?



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Project page:

<http://www.gov.scot/Topics/marine/seamanagement/national/RecandTourism>

Project report:

<http://www.gov.scot/Resource/0049/00497904.pdf>

Summary:

<http://www.gov.scot/Resource/0049/00498311.pdf>

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