

Marine & Coastal Update, 2016

Rhona Fairgrieve, Scottish Coastal Forum

Tay Estuary Forum Conference, 22 April 2016



Overview

- Scottish Marine Tourism & Recreation Survey results
- Potential Marine Scotland priorities for 2016
- The Scottish Coastal Forum @ 20

Scottish Marine Tourism and Recreation Survey 2015 results

Commissioned by

marinescotland

**THE CROWN
ESTATE**



With support from



Survey Snapshot

- Survey
 - Covered 22 specific activities – in line with MMO/SNH/BMF
 - Asked about previous 12 months' activity only
 - Was open for 3 months (end of summer 2015 into shoulder season)
 - Collected points, lines and polygons
 - Workshops assessed early results
- Result
 - 2500 total responses
 - 279 businesses responded
 - 52,000 mapped locations
 - More than 9140 maps



Definitions

- **Tourism** - the activities of persons travelling to and staying in places outside their usual environment ...including over-night visitors and same day visitors
- **Recreation** - any pursuit engaged upon during leisure time. Recreation activities may form part of tourism.
- **General marine recreation activities** - includes beach games, beach combing, rock pooling, sightseeing....horse-riding and dog walking.
- **General marine tourism activities** - such as scenic drives or bus tours

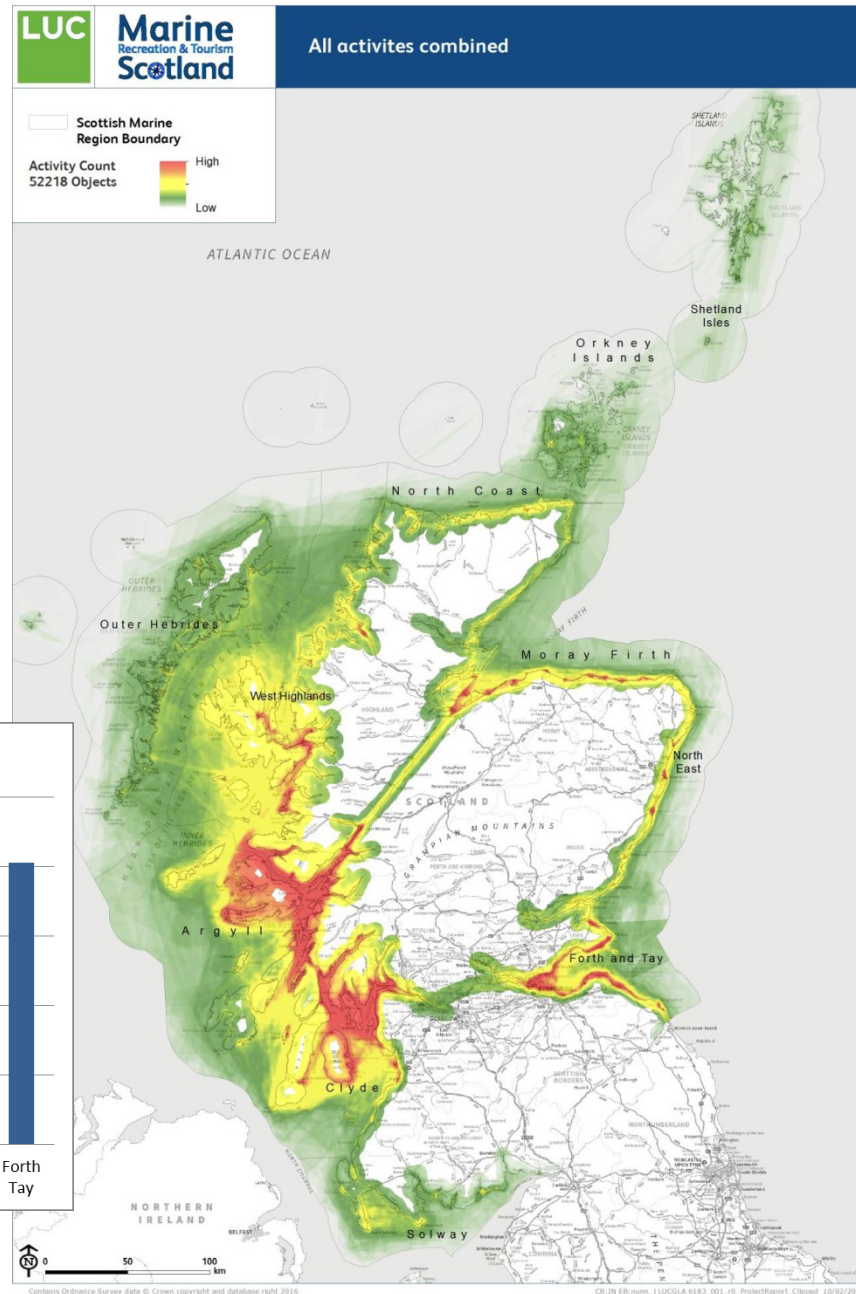
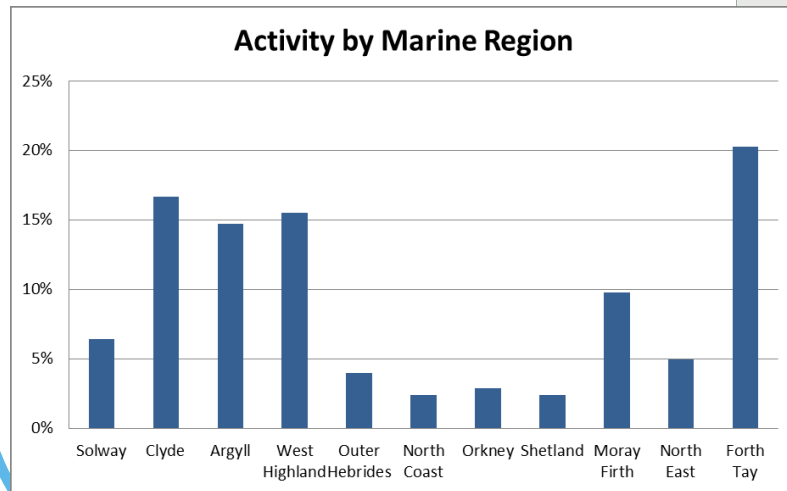
Financial Results

- All 23 specialist activities and tourism is estimated to be worth up to **£3.7 billion** to the Scottish economy.
 - While much of this will benefit the economy of coastal communities, some spending (e.g. fuel) may take place away from the Scottish coast.
- Largest share (**£2.1 billion**) is attributable to **general marine recreation**, reflecting the very large number of participants.
- **Tourism activities** such as scenic drives, bus tours, and visits to historic sites, museums and other visitor attractions account for **around £230 million**.
- **More specialist activities account for the remaining £1.3 billion**, with activities focused around the use of craft (e.g. boats, surfboards etc.) accounting for just under £100 million.

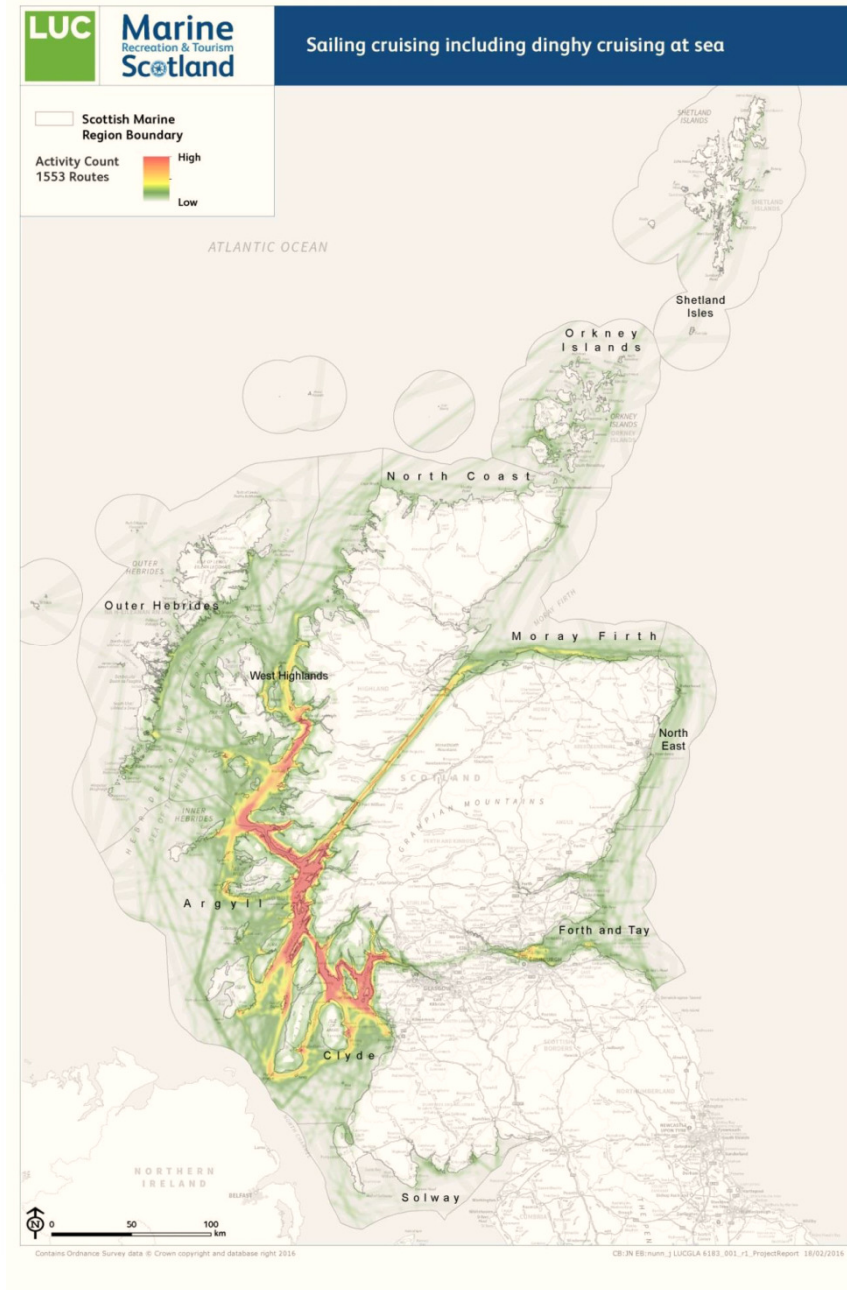
Benchmarking

- **2013:** Scottish Annual Business Survey estimated that 'sustainable tourism' in Scotland accounted for turnover of £6.7 billion.
- **2014:** Visit Scotland estimated that expenditure associated with overnight tourism trips in Scotland totalled £4.8 billion.
- Neither addressed marine recreation *per se*:
2015 figures are useful to tease out sub-sectors of overall tourism market

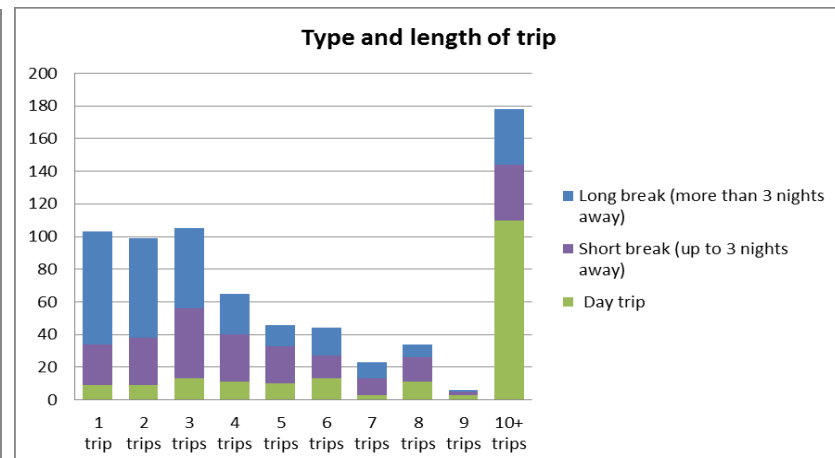
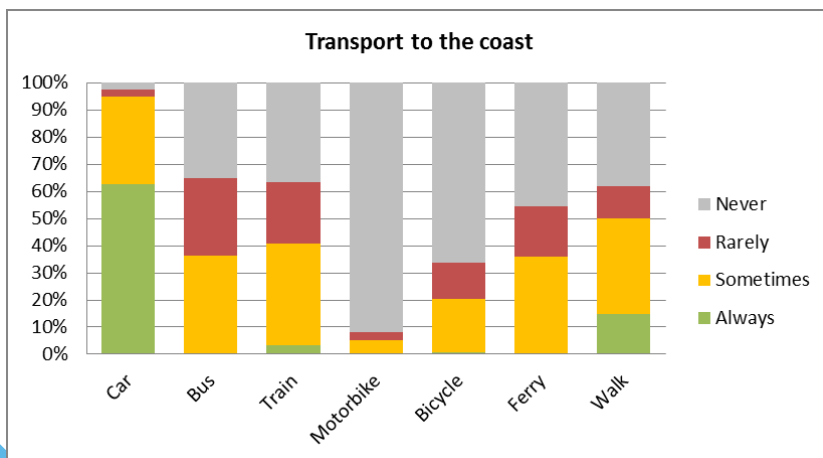
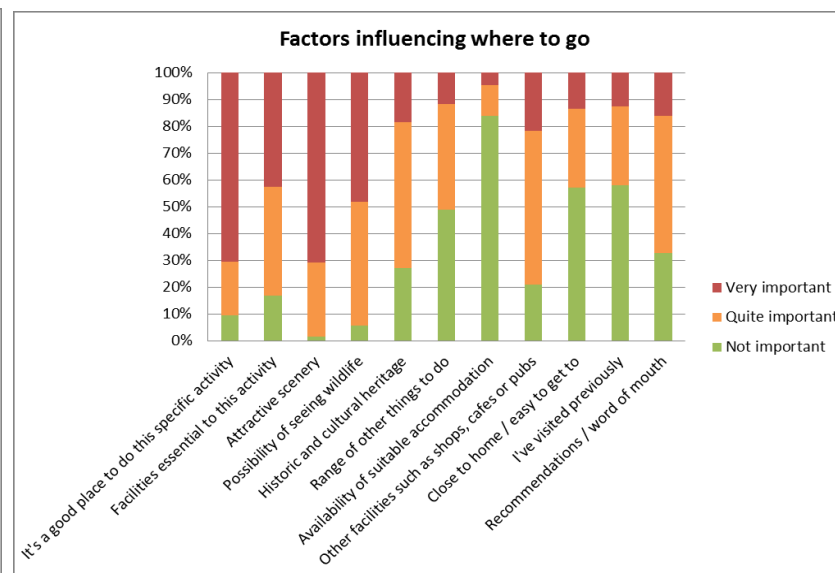
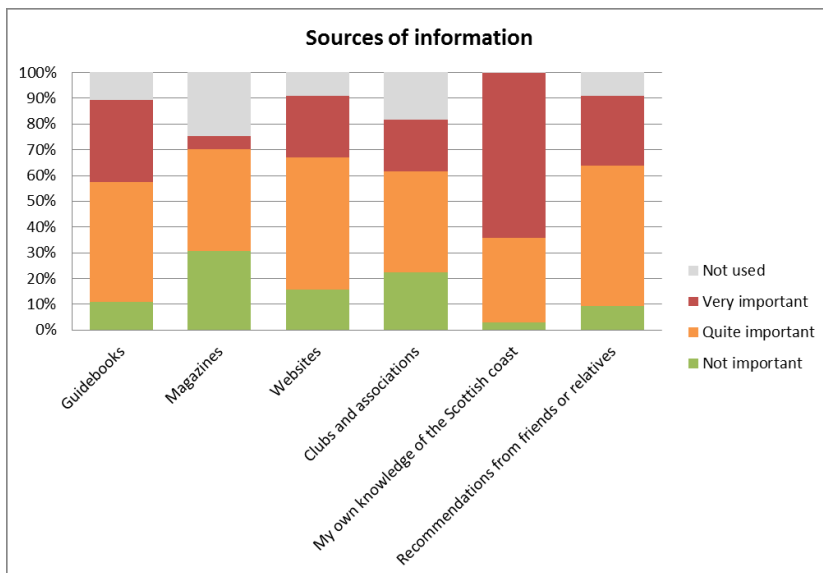
Enough words – lets have some maps!



- Behind each map is a 'wire' model
- This becomes the heat map
- 'Hot spots' become evident

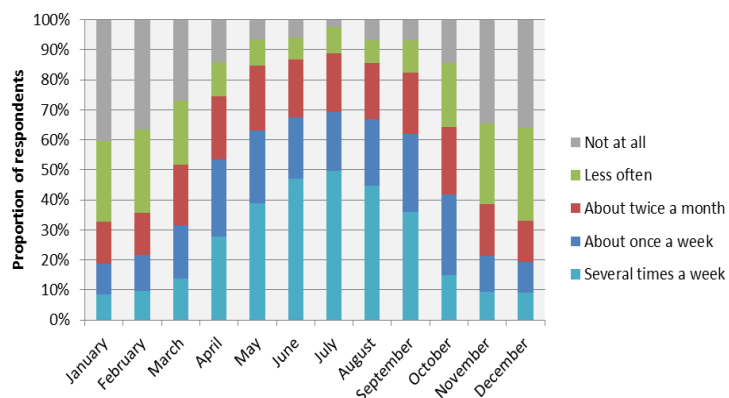


For each activity

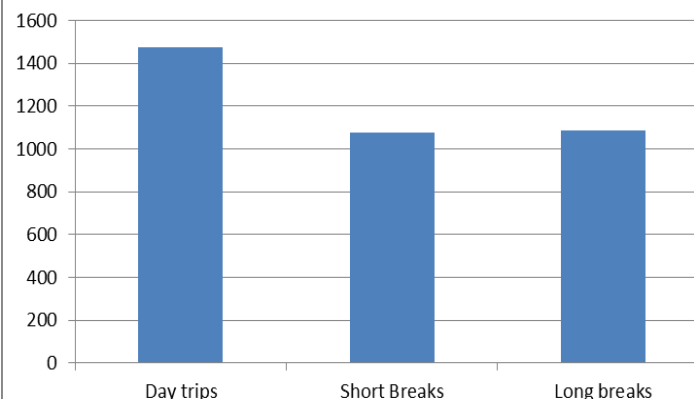


Each activity continued...

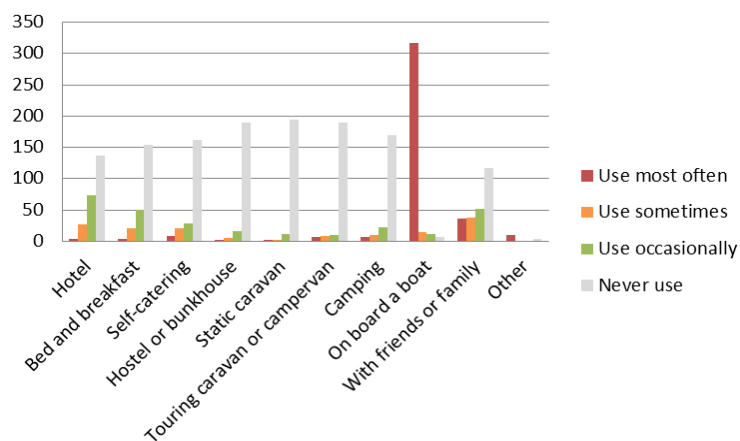
Seasonality - Sail cruising



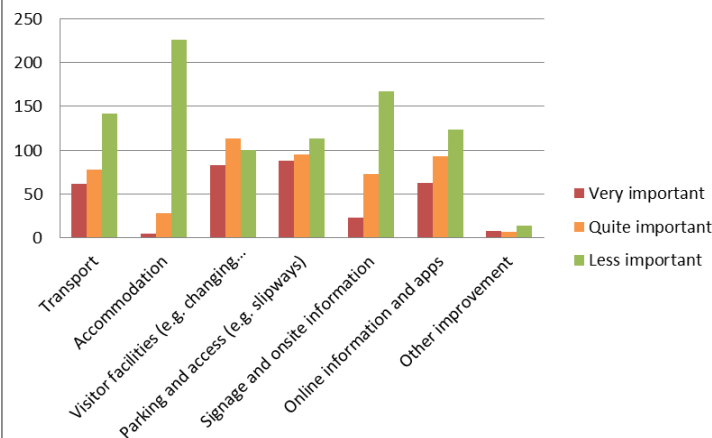
Total number of trips taken by sample



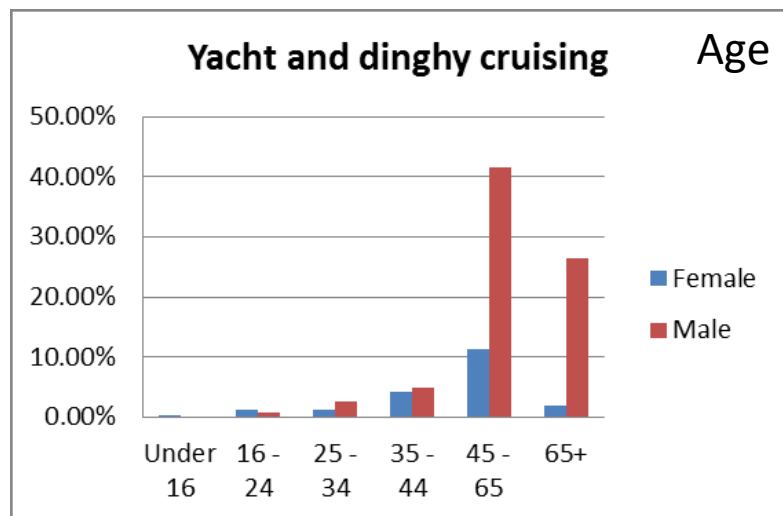
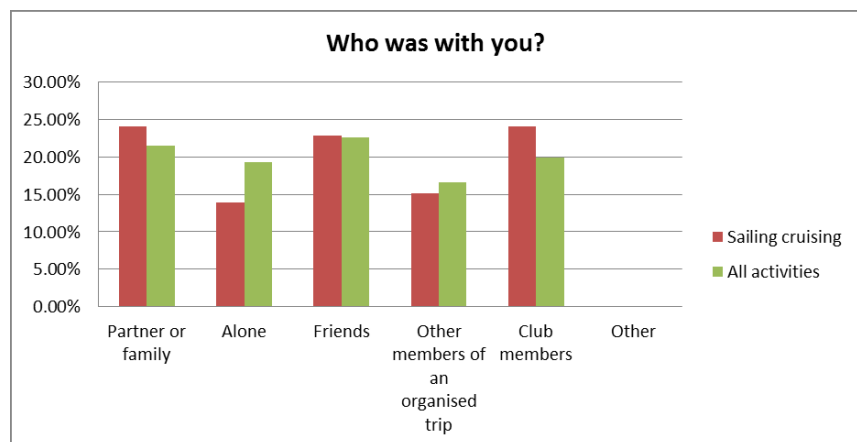
Accommodation



Improvements



And continued...



	Max(£)	Mean (£)	Median (£)
Petrol/diesel/LPG	500	17.86	10
Bus/train fares	200	18.11	5
Car parking	20	4.13	0
Overnight accommodation	2000	137.12	30
Eating out	2500	57.46	25
Food and groceries	1500	38.14	15
Entrance to local visitor attractions	80	13.29	7
Mooring or transit fees	4500	82.53	20
Hire of equipment	300	57.57	10
Maps/guidebooks/leaflets	40	6.42	5
Gifts/souvenirs	200	17.42	5
Other	350	33.51	10
TOTAL	10,750	180.87	62

The way that the survey was designed and publicised means it is not representative of the Scottish population as a whole.

The absence of spatial data, particularly in remoter areas, is not to be taken as an indication that no activity takes place.

Business Survey

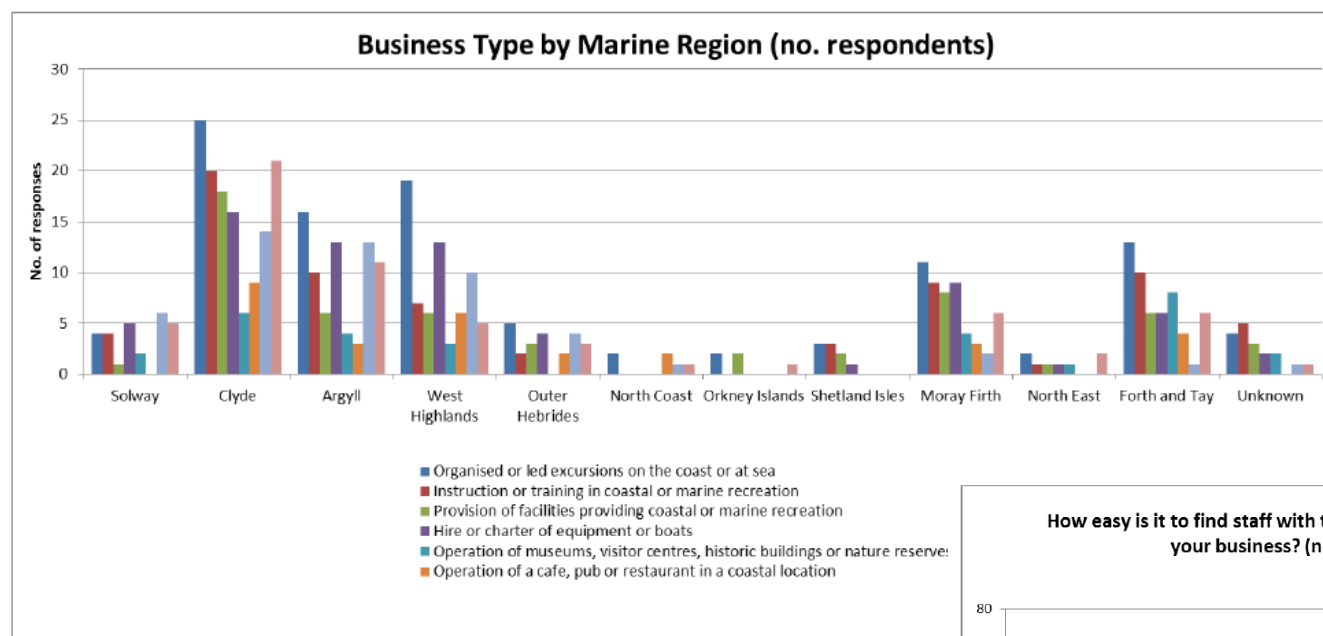


Figure 6.2: Breakdown of services by marine region

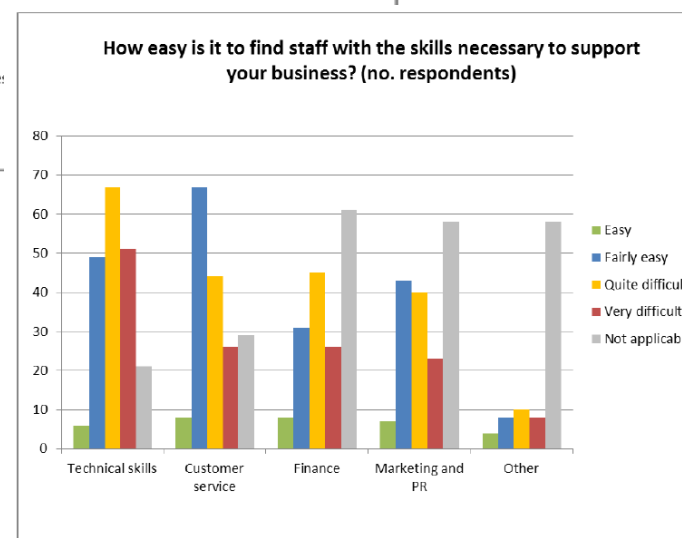


Figure 6.9: skills issues in recruitment

A few highlights...

- Ecosystem services hugely important to participants
- 65% of respondents travelled by car
- 60% always or sometimes walk
- Average of 5.95 day trips/year and 1.39 longer breaks
- Spend £55 per day and £2000 per annum
- 16% of respondents came from outside Scotland
- 90% indicated that they were very likely to visit again
- 40% of businesses run excursions
- 60% of businesses operate all year round

Reflections

- So much we didn't know but now there are even more questions!
- Early stakeholder input essential – partnership approach was ideal.
- Stakeholder database essential
- Areas of seemingly low activity should not be taken as confirmation of low activity.

Download the full report

Scottish Marine Recreation & Tourism Survey 2015: Main Report & Summary Leaflet

Downloadable documents:

Title:	Scottish Marine Recreation & Tourism Survey 2015
Description:	Scottish Marine Recreation & Tourism Survey 2015
File:	Main Report [PDF, 3828.5 kb: 22 Mar 2016] Open Open in new window
File:	Summary Leaflet [PDF, 1693.2 kb: 23 Mar 2016] Open Open in new window
	Viewer Help

Scottish Marine Recreation & Tourism Survey 2015: Appendices

Downloadable documents:

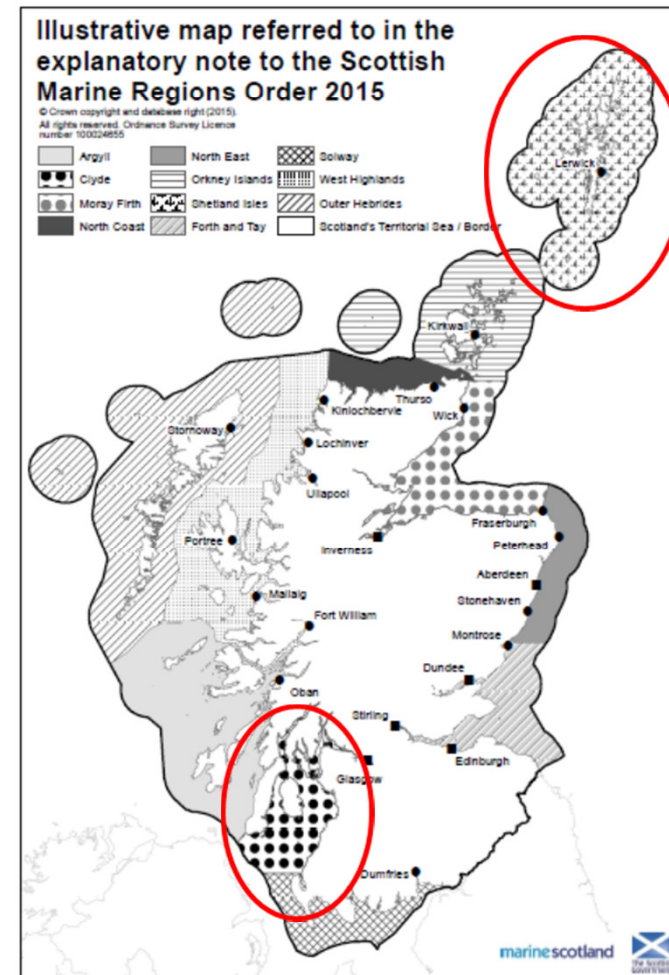
Title:	Scottish Marine Recreation & Tourism Survey 2015
Description:	Scottish Marine Recreation & Tourism Survey 2015
File:	Appendix 1 - General Marine & Coastal Recreation [PDF, 937.6 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 2 - General Marine & Coastal Tourism [PDF, 1112.9 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 3 - Visit to historic sites and attractions [PDF, 914.5 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 4 - Walking at the Coast [PDF, 951.9 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 5 - Long distance swimming in the sea [PDF, 533.7 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 6 - Birds and wildlife watching [PDF, 923.1 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 7 - Coastal climbing, bouldering and coasteering [PDF, 1289.0 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 8 - Land yachting, power kiting and kite buggying at the coast [PDF, 655.6 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 9 - SCUBA diving in the sea [PDF, 1486.2 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 10 - Surfing, surf kyaking or paddleboarding in the sea [PDF, 1061.9 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 11 - Windsurfing and kite surfing at the coast [PDF, 625.3 kb: 21 Mar 2016] Open Open in new window

File:	Appendix 12 - Canoeing or kayaking in the sea [PDF, 1504.0 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 13 - Rowing and sculling in the sea [PDF, 1435.1 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 14 - water skiing and wakeboarding in the sea [PDF, 848.6 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 15 - Dinghy racing at sea [PDF, 1432.2 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 16 - yacht racing at sea [PDF, 761.9 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 17 - sailing cruising including dinghy cruising at sea [PDF, 1112.7 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 18 - Motor cruising at sea [PDF, 515.0 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 19 - Power boating at sea [PDF, 1084.6 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 20 - Personal watercraft (jet skis) at sea [PDF, 1202.1 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 21 - Sea angling from the shore [PDF, 1381.8 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 22 - Sea angling from a private or chartered boat [PDF, 1257.6 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 23 - Other - wildfowling [PDF, 888.5 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 24 - Activity Survey questionnaire [PDF, 2694.8 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 25 business questionnaire [PDF, 288.2 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 26 - Stakeholders for Survey Launch & Publicity [PDF, 105.0 kb: 21 Mar 2016] Open Open in new window
File:	Appendix 27 - Marine Regions [PDF, 277.4 kb: 21 Mar 2016] Open Open in new window

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

Sarah Brown, Clyde Marine Planning Partnership: sarah@clydeforum.org

- First 2 Marine Planning Partnerships
 - Direction to Plan given to Shetland MPP
 - Direction to Clyde post-Election
- Local Authority liaison
- NMPI evolution
- European projects:
 - NorthSEE
 - SIMCelt



SCF @ 20

- Remit may alter to include 'marine' as well as 'coastal' aspects (tbc)
- European project involvement: SIMCelt
 - Clyde MPP
 - Solway Firth Partnership
- Liaison with LCPs continues





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<http://www.gov.scot/Topics/marine/seamanagement/regional/Scottish-Coastal-Forum>