

## **Appendix 10**

### Surfing, surf kayaking or paddleboarding in the sea



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**Table A10.1: Summary of sample confidence levels**

Responses	Spatial data	Questionnaire data
<30	Very low sample – interpret spatial data with great care	Very low sample – do not analyse questionnaire results
30 – 60	Low sample –interpret spatial data with care	Low sample –analyse questionnaire results with caution
60 -100	Medium sample – good spatial data	<b>Medium sample – analyse questionnaire results with care</b>
>100	<b>Robust sample</b>	Robust sample

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

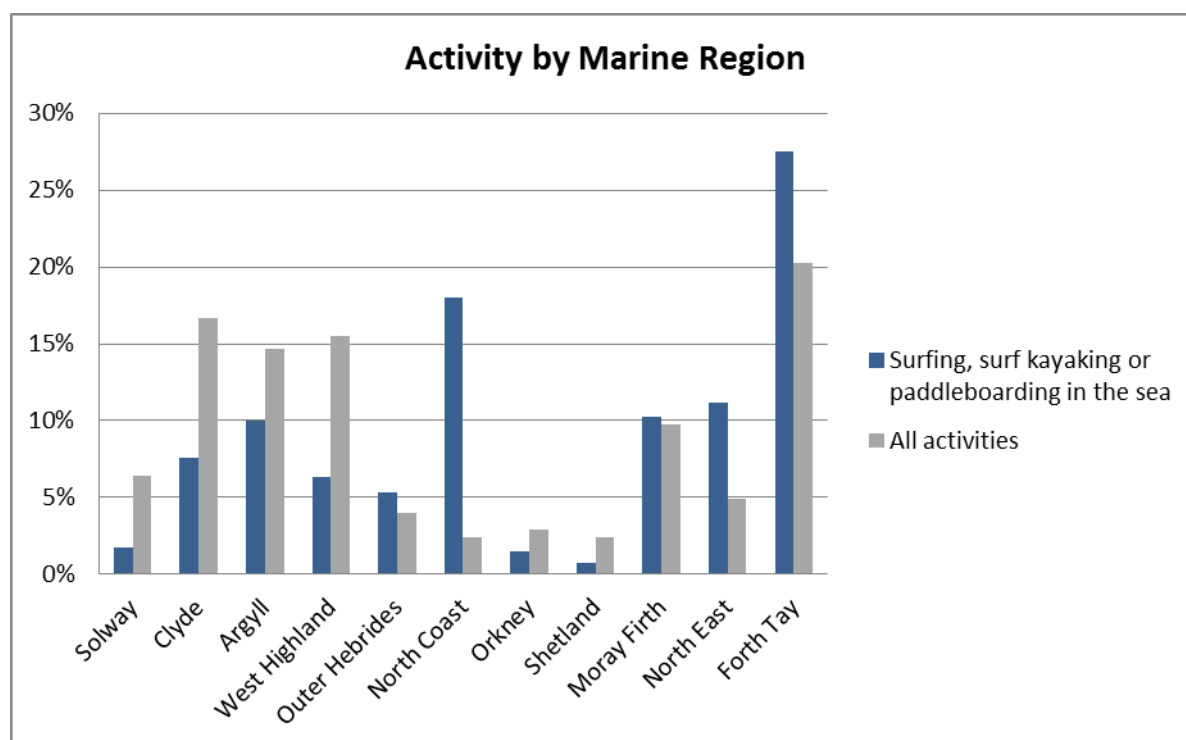
1. This category grouped together surfing, surf kayaking and paddleboarding in the sea, reflecting their similar locational requirements.

#### 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 import. They were asked a series of questions relating to their participation in these activities.
3. A total of **201** people provided spatial information on surfing, surf kayaking and paddleboarding, representing around 9% of the total sample. **80** people identified surfing, surf kayaking and paddleboarding as one of their most important activities, representing around 3.5% of the total sample. These are good samples meaning that confidence in the analysis of responses is moderate. 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 40% of those who provided spatial data on surfing, surf kayaking and paddleboarding identified it as one of their most important activities.
5. Based on the sample of people who provided spatial information, around 48% of respondents lived within a mile of the Scottish coastline, 21% between one and five miles and 24% more than five miles. The remaining 7% of respondents came from outside Scotland.

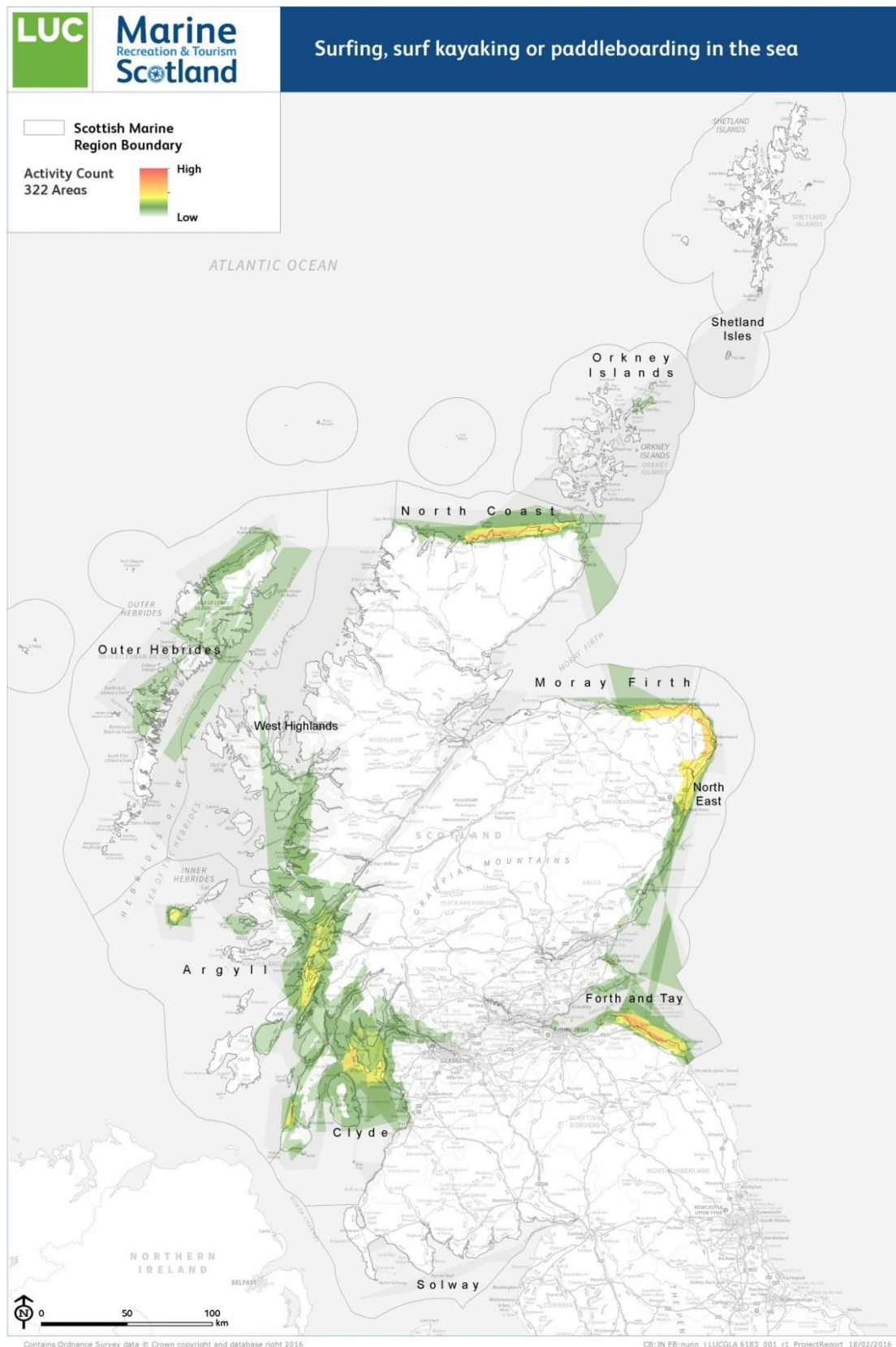
## Spatial data

6. People completing the survey identified 322 locations where they had been surfing, surf kayaking and paddleboarding. This information has been used to generate a heat map showing the concentration of activity around the Scottish coast (see **Map A10.1**). Key concentrations of activity include the north Caithness coast, the coastline between Banff and Aberdeen, the Lothian coast and parts of Argyll, including Machrihanish Bay and the Isle of Tiree. This map is available on Marine Scotland's National Marine Plan Interactive (NMPi) website (<https://marinescotland.atkinsgeospatial.com/nmpi/>).
7. **Figure A10.1** shows the percentage distribution of surfing, surf kayaking and paddleboarding across Marine Regions. It shows a concentration of activity within the Forth Tay, North Coast and North East Marine Regions. Compared with the survey sample as whole, there is relatively more surfing, surf kayaking and paddleboarding activity within the Forth and Tay, North Coast and North East Marine Regions, and relatively less activity within the West Highland, Clyde and Argyll Marine Regions. This broadly mirrors the distribution of surf beaches around the Scottish coastline<sup>36</sup>.



**Figure A10.1: Surfing, surf kayaking and paddleboarding – spread of activity across Marine Regions (%)**

<sup>36</sup> See surf locations map on NMPi <https://marinescotland.atkinsgeospatial.com/nmpi/>



**Map A10.1: Surfing, surf kayaking or paddleboarding (201 responses)**

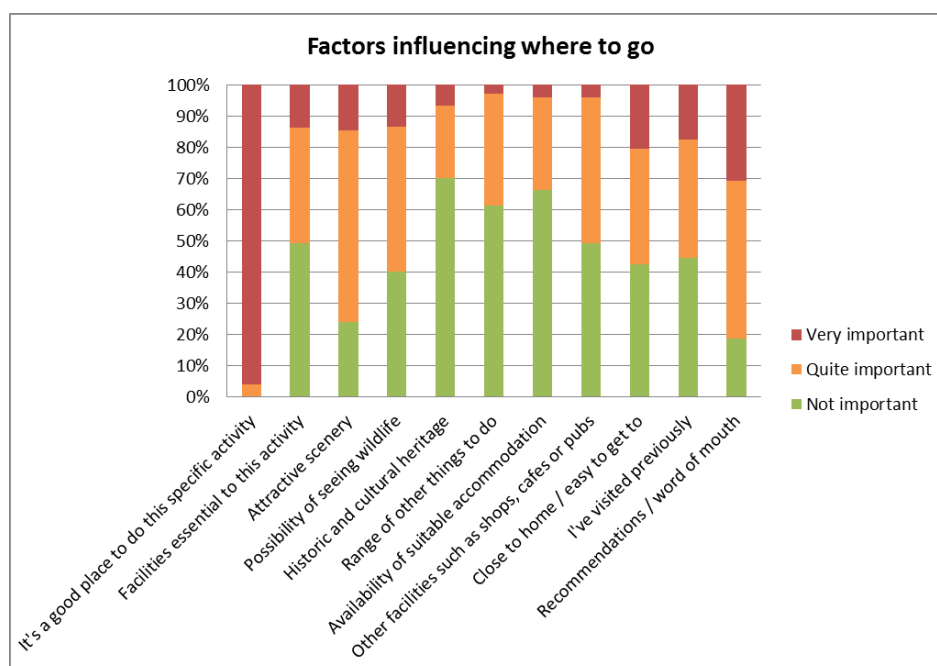


### Trip planning

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

### *Factors influencing decisions on where to go*

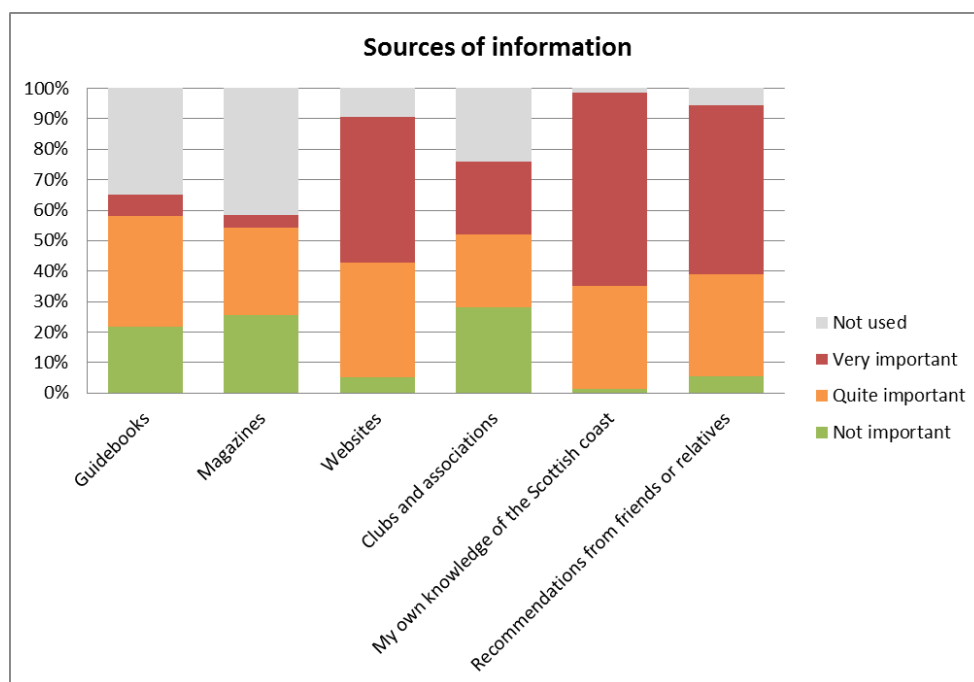
9. The location of beaches with suitable surf conditions is by far the most important factor in deciding where these respondents go. Other factors include recommendations from friends and family, the quality of local scenery, possibility of seeing wildlife, facilities, proximity to home and familiarity from previous visits.



**Figure A10.2: Surfing, surf kayaking and paddleboarding – factors influencing where to go**

### *Sources of information*

10. The most importance source of information for surfers, surf kayakers and paddleboarders is people's own knowledge of the Scottish coastline. Other important sources include recommendations from friends and family and web based information. Guidebooks, magazines and clubs and associations are less important.

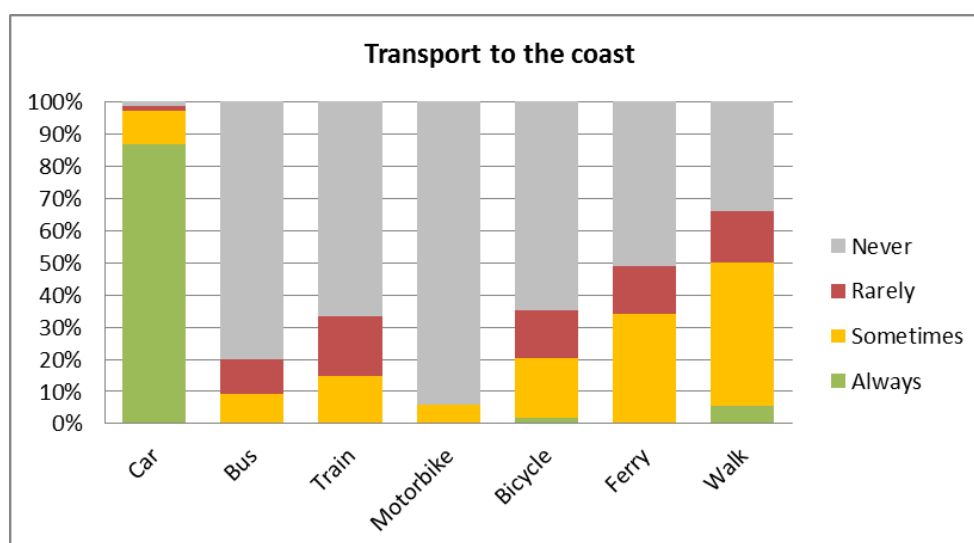


**Figure A10.3: surfing, surf kayaking and paddleboarding – sources of information**

## Characteristics of trip to the coast

### *Transport to start point*

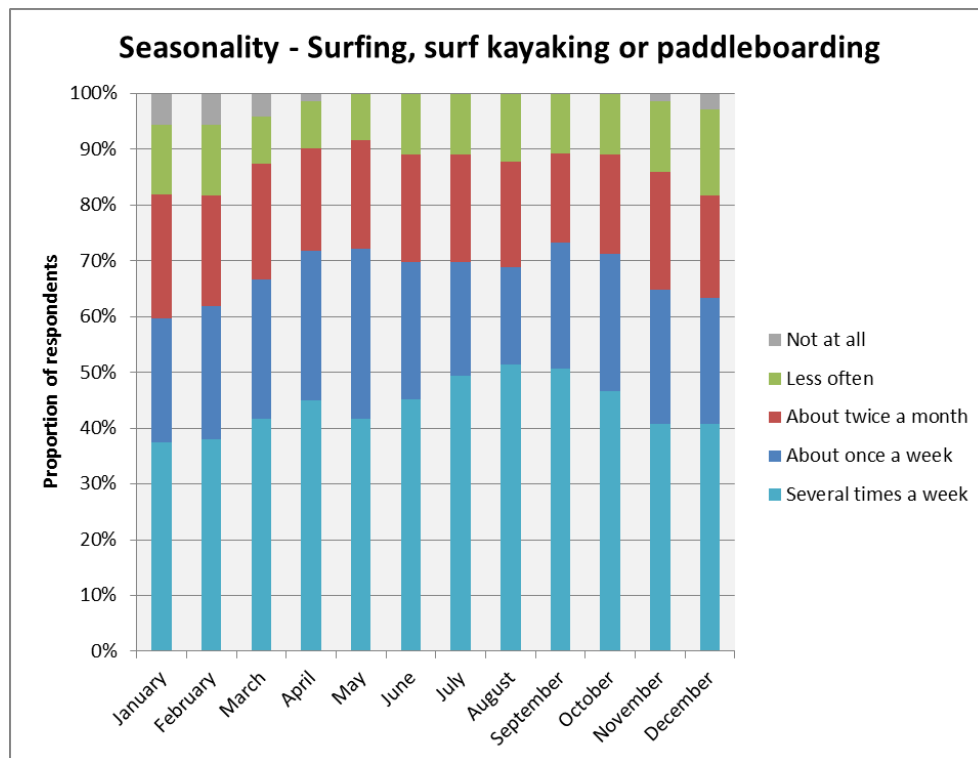
11. Car is by far the most common mode of transport to the start of people's visit to the coast, with over 85% of respondents indicating they always travel that way, and most of the remainder indicating they sometimes go by car. Around 50% of people walk to the coast while a third sometimes use a ferry as part of their journey. Small numbers travel by bus, train or bicycle reflecting the equipment requirements of these activities.



**Figure A10.4: Surfing, surf kayaking and paddleboarding – transport**

## Monthly profile of activity

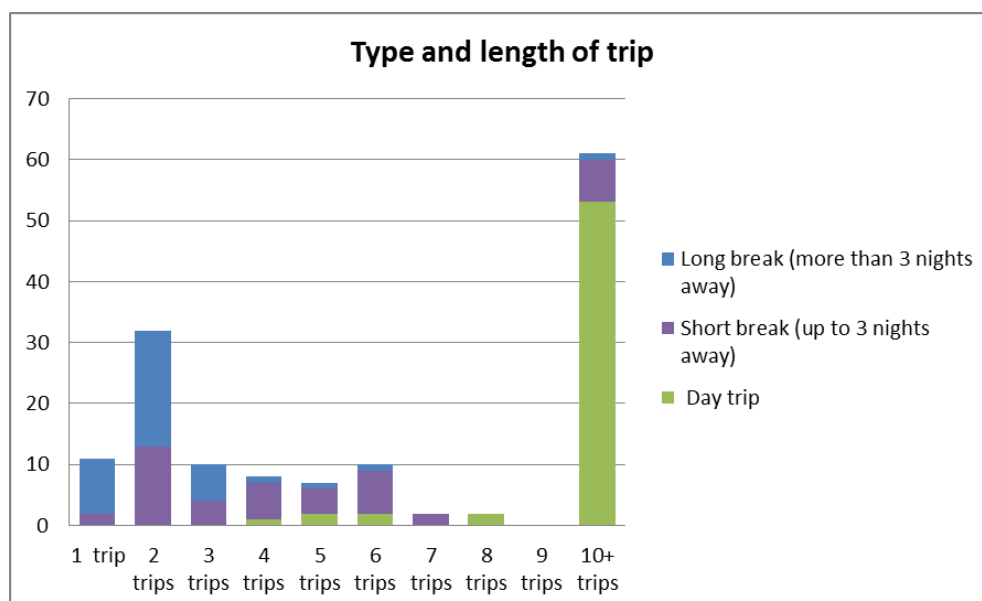
12. **Figure A10.5** shows the frequency of surfing, surf kayaking and paddleboarding activity across each month of the year. Although there is a slight increase in activity during the summer months, this group of activities is distinguished by a profile which appears relatively unaffected by seasons.



**Figure A10.5: Surfing, surf kayaking and paddleboarding – seasonality**

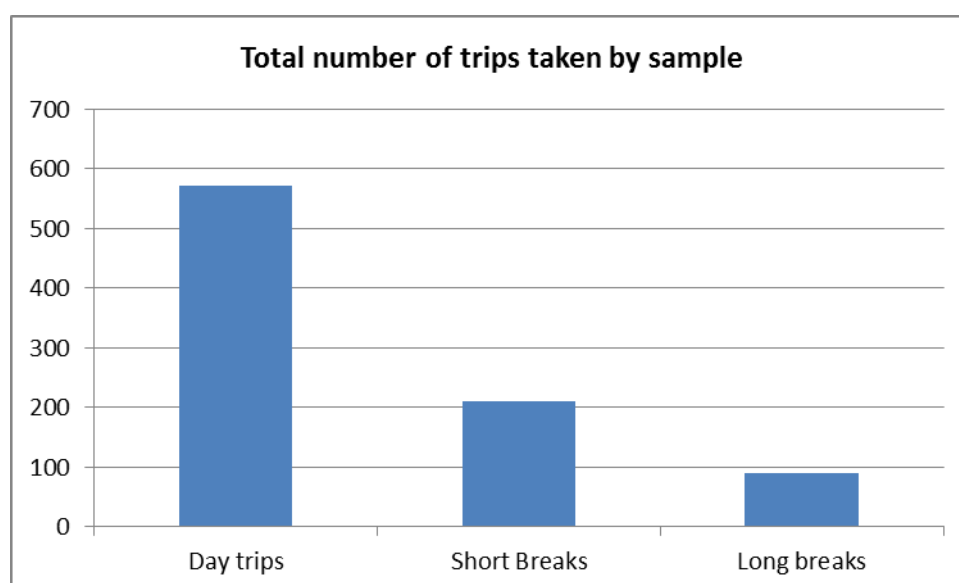
## Trip length

13. Surfers, surf kayakers and paddleboarders made an average of around 7 day trips, 2.75 short breaks and 1.2 longer breaks per year. This represents a larger number of day trips and short breaks than the average for the survey sample as a whole.



**Figure A10.6: Surfing, surf kayaking and paddleboarding – type and length of trip**

14. The sample of 80 respondents accounts for a minimum of around 572 day trips, 210 short breaks and 90 longer breaks.

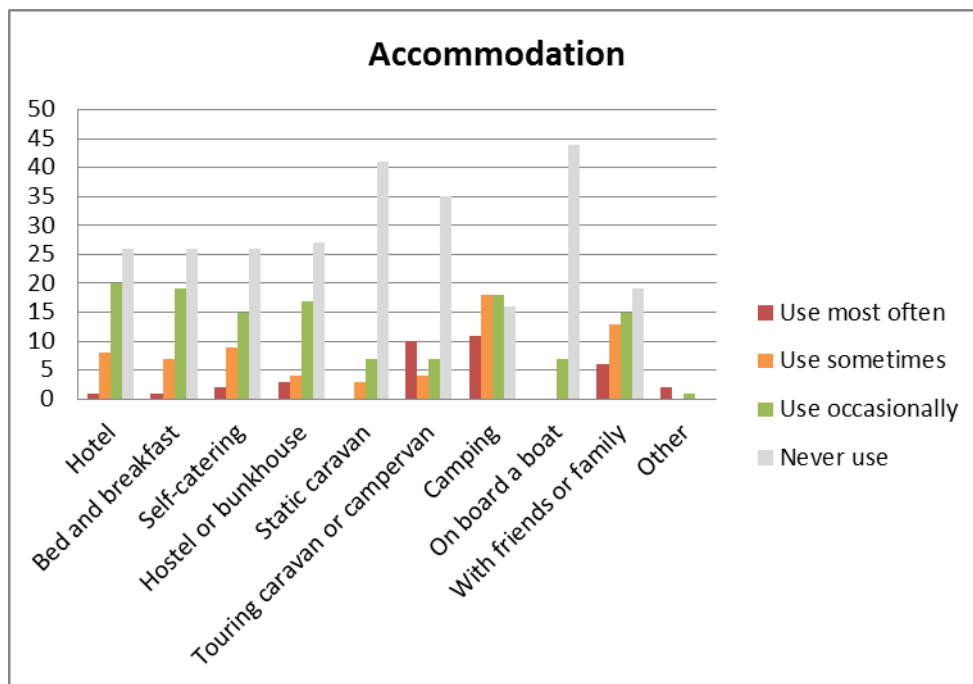


**Figure A10.7: Surfing, surf kayaking and paddleboarding – total number of trips**

### *Accommodation used*

15. People provided information on the types of accommodation they typically use. Camping, followed by staying with friends and family and use of a touring caravan or campervan were the most popular types of accommodation.

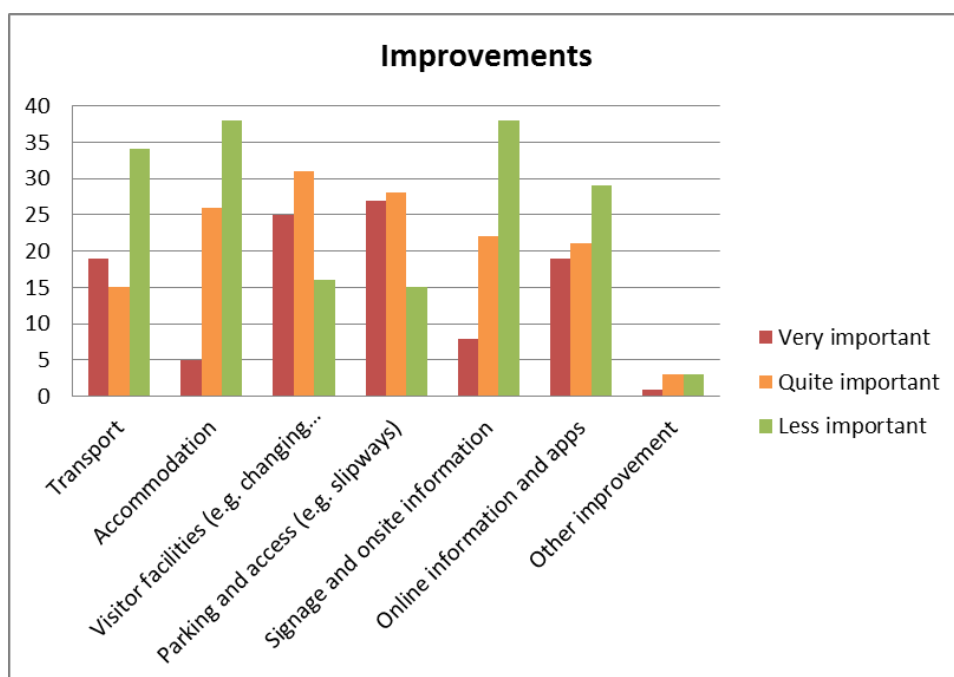




**Figure A10.8: Surfing, surf kayaking and paddleboarding – accommodation**

## *Improvements to make trip more enjoyable*

- The most common areas for improvement cited by surfers, surf kayakers and paddleboarders were parking and access and the provision of visitor facilities such as places for changing. The availability of online information and transport provision were of secondary importance with onside information and accommodation of least significance.



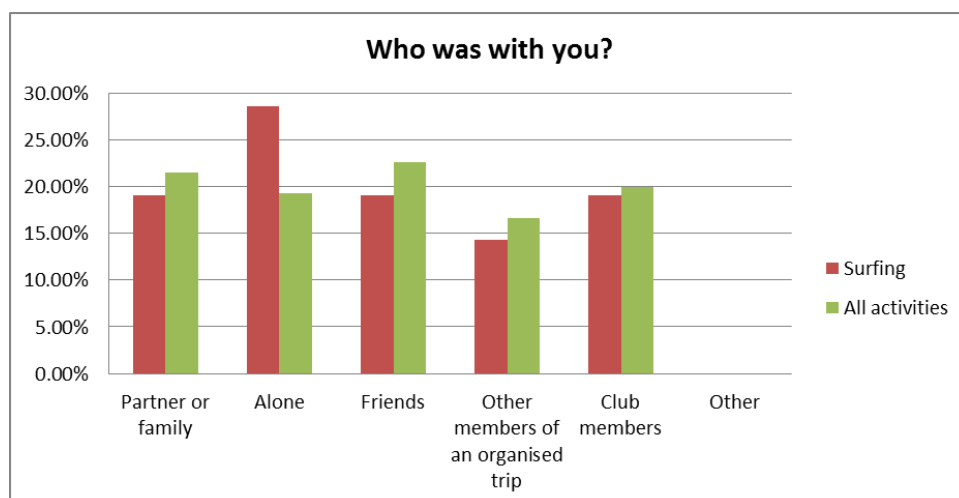
**Figure A10.9: Surfing, surf kayaking and paddleboarding – improvements**

## Party

- 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?*

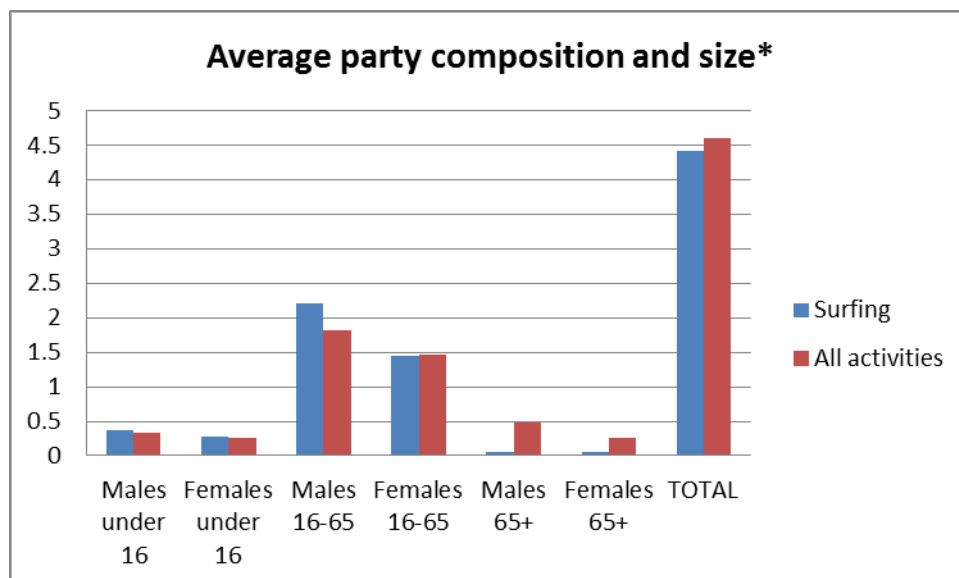
- Figure A10.10** suggests that surfers, surf kayakers and paddleboarders are more likely to be alone than survey sample as a whole. People were least frequently with members of an organised trip.



**Figure A10.10: Surfing, surf kayaking and paddleboarding – party**

## Age groups and gender composition of party

19. Respondents were also asked about the age and gender composition of their party<sup>37</sup>. **Figure A10.11** shows surfers, surf kayakers and paddleboarders tend to be parties of very similar size to that 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.



**Figure A10.11: Surfing, surf kayaking and paddleboarding – party composition and size**

## 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

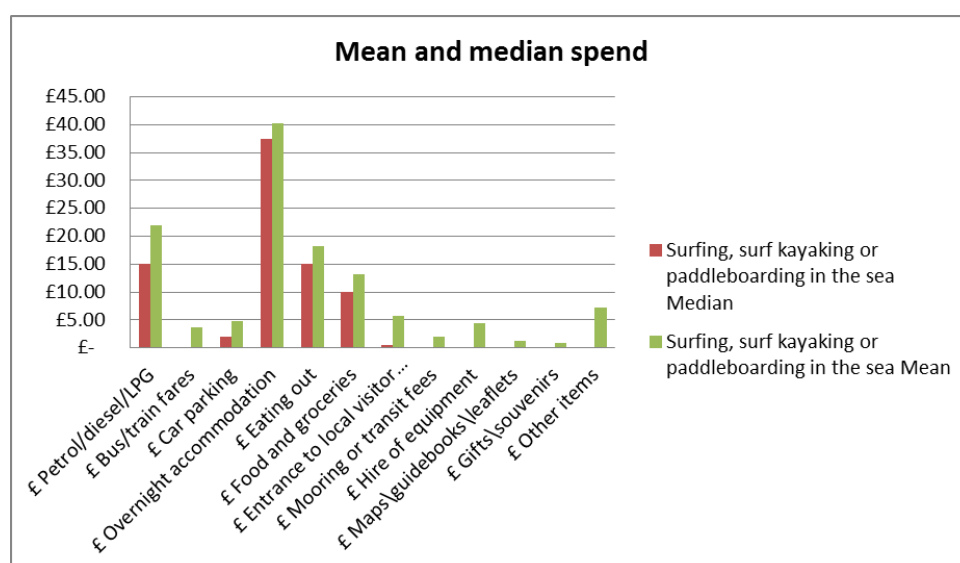
21. **Table A10.2** shows the maximum, mean and median daily spending against a series of headings. This analysis suggests a median spend of around £34 per day during surfing, surf kayaking and paddleboarding trips to the coast.
22. Maximum, mean and median spending under each of the categories was as follows:

<sup>37</sup> \* 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.

**Table A10.2: Surfing – max, mean and median spend per day (£)**

	Max (£)	Mean (£)	Median (£)
Petrol/diesel/LPG	120	22	15
Bus/train fares	15	4	0
Car parking	50	5	2
Overnight accommodation	100	40	38
Eating out	50	18	15
Food and groceries	60	13	10
Entrance to local visitor attractions	20	6	1
Mooring or transit fees	10	2	0
Hire of equipment	10	4	0
Maps/guidebooks/leaflets	5	1	0
Gifts/souvenirs	5	1	0
Other	40	7	0
<b>TOTAL</b>	<b>350</b>	<b>54</b>	<b>34</b>

23. These figures exclude the 6 respondents who provided no information on their spending, but include the 6 respondent who stated that they spent nothing during their trip.

**Figure A10.12: Surfing, surf kayaking and paddleboarding – mean and median spend per day**

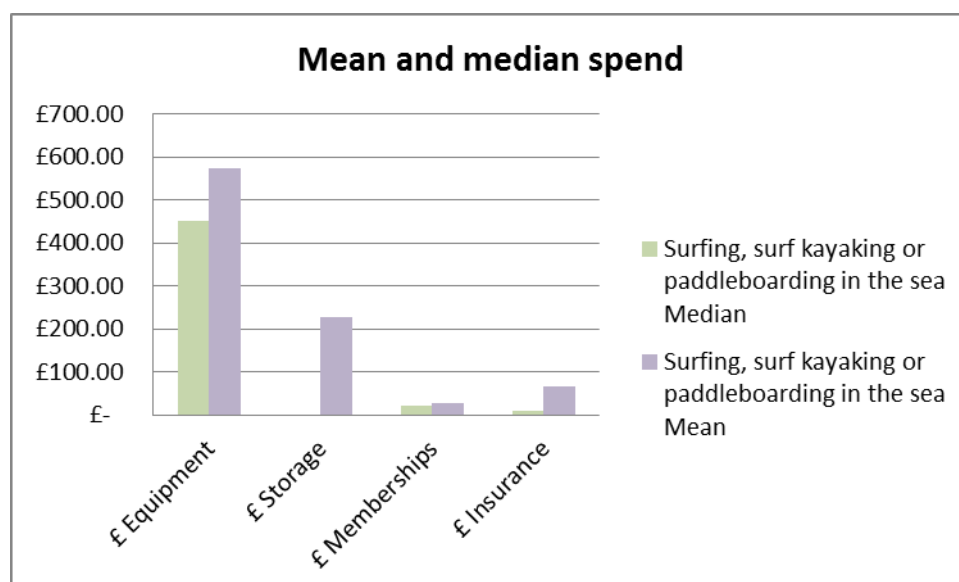
## Spend per year by category

24. Respondents were also asked to record their annual spending on surfing, surf kayaking and paddleboarding. **Table A10.3** 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 surfing, surf kayaking and paddleboarding was £500.
25. Maximum, mean and median spending under each of the categories was as follows:

**Table A10.3: Surfing – max, mean and median spend per year (£)**

	Max (£)	Mean (£)	Median (£)
Equipment	5000	572	450
Storage	1500	226	0
Memberships	100	27	20
Insurance	500	65	10
<b>TOTAL</b>	<b>6550</b>	<b>621</b>	<b>500</b>

26. These figures exclude the 12 respondents who provided no information on their spending.



**Figure A10.13: Surfing, surf kayaking and paddleboarding – mean and median spend per year**

## Clubs and codes of conduct

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

### Club membership

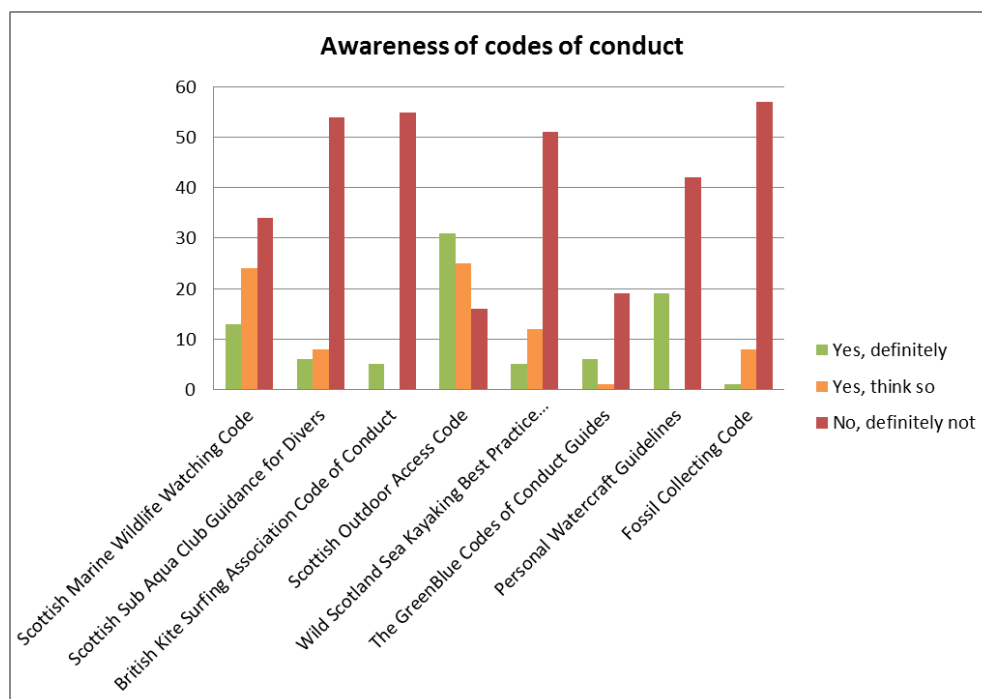
28. Of the 78 people who answered this question, around half were members of local or national organisations. Examples listed include the Scottish Surfing Federation, Edinburgh Surf Group and the Outer Hebrides Surfing Association.

**Table A10.4: Surfing, surf kayaking and paddleboarding - membership of local or national organisations**

	Do you belong to any clubs, associations or governing bodies relating to coastal recreation?
Local organisation	13
National organisation	25
None	40
<b>Grand Total</b>	<b>78</b>

### Awareness of codes of conduct

29. Surfers, surf kayakers and paddleboarders were most aware of the Scottish Outdoor Access Code, the Scottish Marine Wildlife Watching Code and the Personal Watercraft Guidelines.



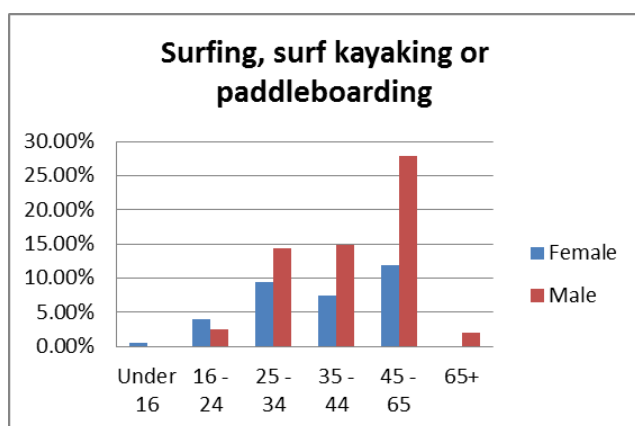
**Figure A10.14: Surfing, surf kayaking and paddleboarding – codes of conduct**



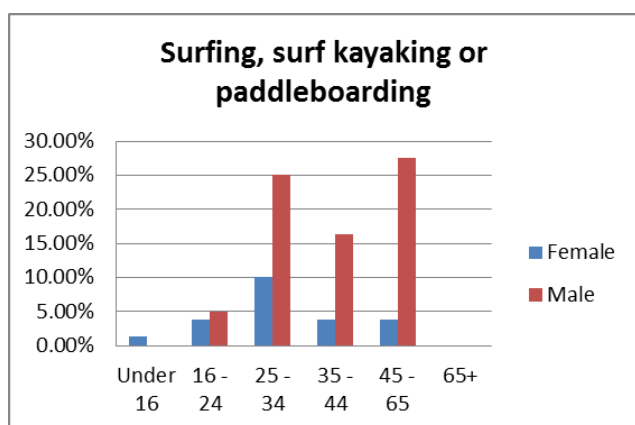
### Socio-economic profile

#### Age and gender

30. **Figure A10.15** shows the age and gender profile of all those who indicated that they had taken part in surfing, surf kayaking or paddleboarding 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 surfers, surf kayakers and paddleboarders were more likely to be male and in the 25 to 34 and 35 to 44 age bands.
31. **Figure A10.16** shows the age and gender profile of those who identified surfing, surf kayaking or paddleboarding as one of their most important activities. This suggests an even greater proportion of men in the 25 to 34 and 35 to 44 age bands.



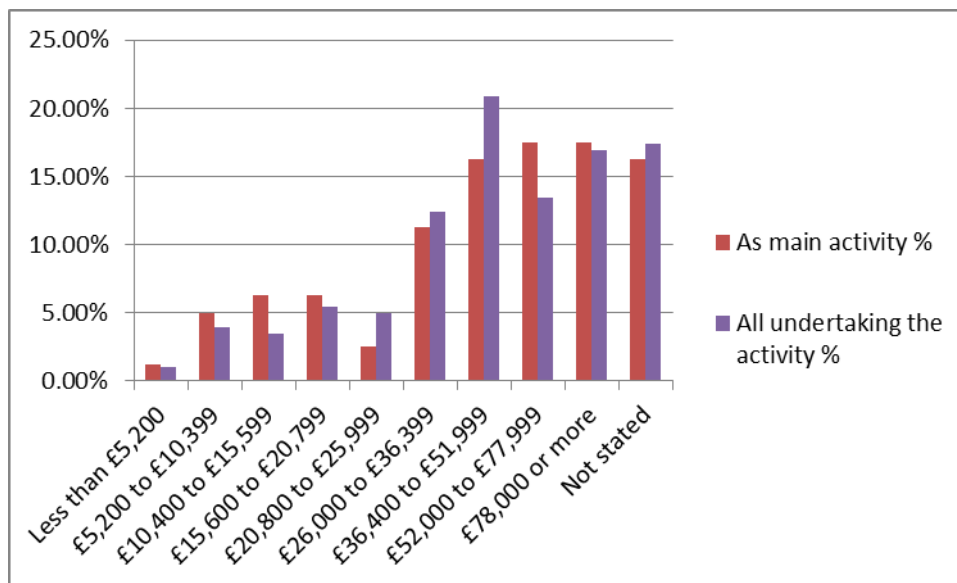
**Figure A10.15: Age and gender profile of all participating in surfing, surf kayaking and paddleboarding**



**Figure A10.16: Age and gender profile of those who identified surfing, surf kayaking and paddleboarding as a main activity**

#### Household income

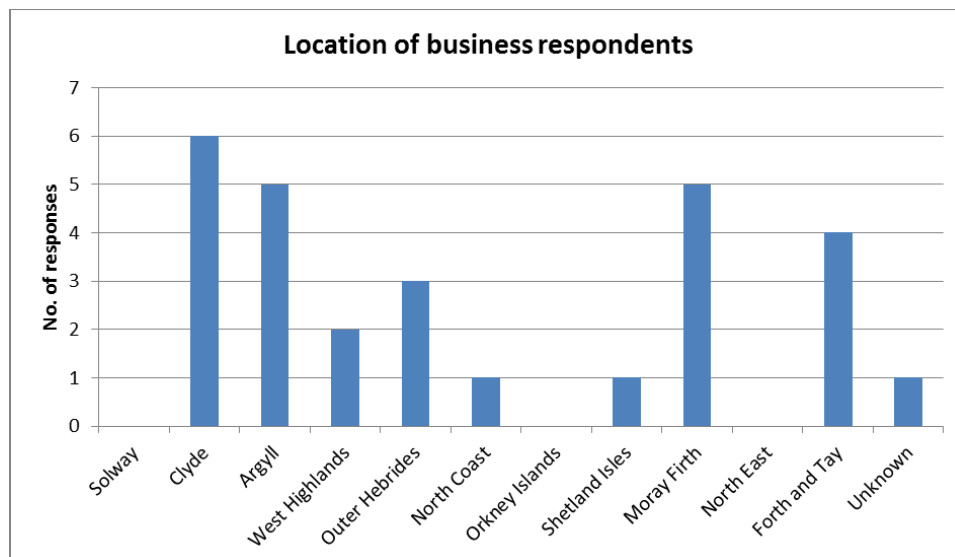
32. Analysis of respondents' household income suggests over 60% of surfers, surf kayakers and paddleboarders have incomes of £26,000 or more. This indicates incomes higher than the Scottish household average (2014) of around £23,000.



**Figure A10.17: Surfing, surf kayaking and paddleboarding –household income**

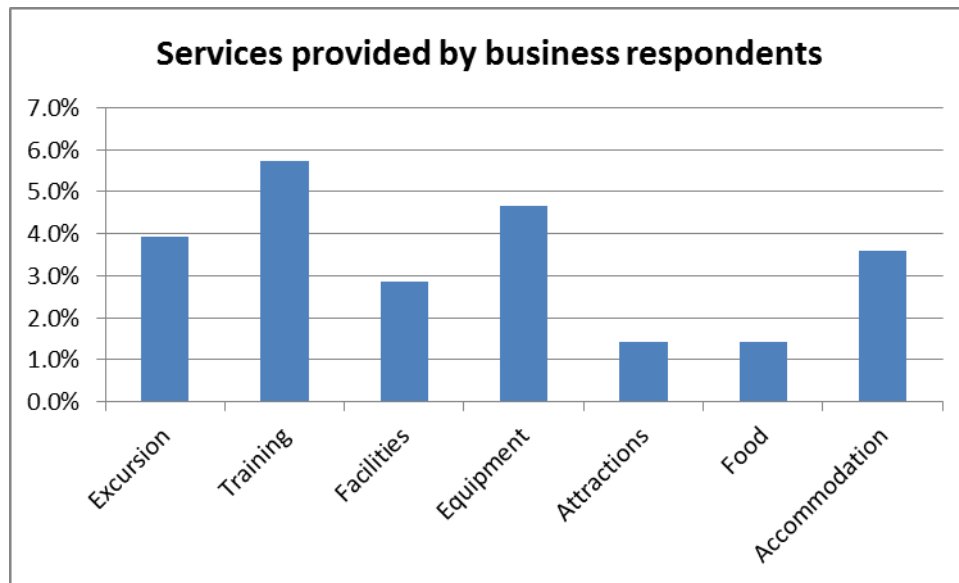
## Business survey findings

33. 29 of the 279 respondents in the business survey stated that their business serves surfing, surf kayaking and paddleboarding. **Figure A10.18** 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 A10.18: Distribution of the businesses across Marine Regions**

34. Business respondents were asked to indicate the kinds of services they provide. **Figure A10.19** shows the services provided by businesses serving surfing, surf kayaking and paddleboarding.



**Figure A10.19: Services provided by businesses serving surfing, surf kayaking and paddleboarding**