Appendix 7
Coastal climbing, bouldering and coasteering



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Table A7.1: 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	Medium sample – analyse questionnaire results with care
>100	**Robust sample**	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 was designed to gather information on climbing, bouldering and coasteering where it occurs along the Scottish coastline.

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 **230** people provided spatial information on climbing, bouldering and coasteering, representing around 10% of the total sample. This is a good sample, meaning that confidence in the analysis of spatial information 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. An additional nine clubs provided spatial information on climbing, bouldering and coasteering.
4. **43** people identified climbing, bouldering and coasteering as one of their most important activities, representing around just under 2% of the total sample. This is small sample, meaning that confidence in the analysis of responses is moderate to low.
5. Around 19% of those who provided spatial data on climbing, bouldering and coasteering identified it as one of their most important activities.
6. Based on the sample of people who provided spatial information, around 48% of respondents lived within a mile of the Scottish coastline, 20% between one and five miles and 22% more than five miles. The remaining 9% of respondents came from outside Scotland.

Spatial data

7. People completing the survey identified 1085 locations where they had been climbing, bouldering and coasteering. This information has been used to generate a heat map showing the concentration of climbing, bouldering and coasteering activity around the Scottish coast (see **Map A7.1**). **Map A7.2** shows the spatial information provided by club survey responses. Key concentrations of climbing and coasteering activities include the coastline south of Aberdeen, locations within the Firth of Forth, an area around Oban and the Coigach coast. Club responses suggest more limited coverage with the main concentration of locations being along the Caithness coast. With only nine club responses, this may reflect input from a single organisation. These maps are available on Marine Scotland's National Marine Plan Interactive (NMPi) website (https://marinescotland.atkinsgeospatial.com/nmpi/).

8. **Figure A7.1** shows the percentage distribution of climbing, bouldering and coasteering across Marine Regions. It shows concentrations of activity in the West Highlands, North East, Forth and Tay, Clyde and Argyll Marine Regions. The North East and West Highland Marine Regions have much greater concentrations of activity than for the survey sample as a whole.

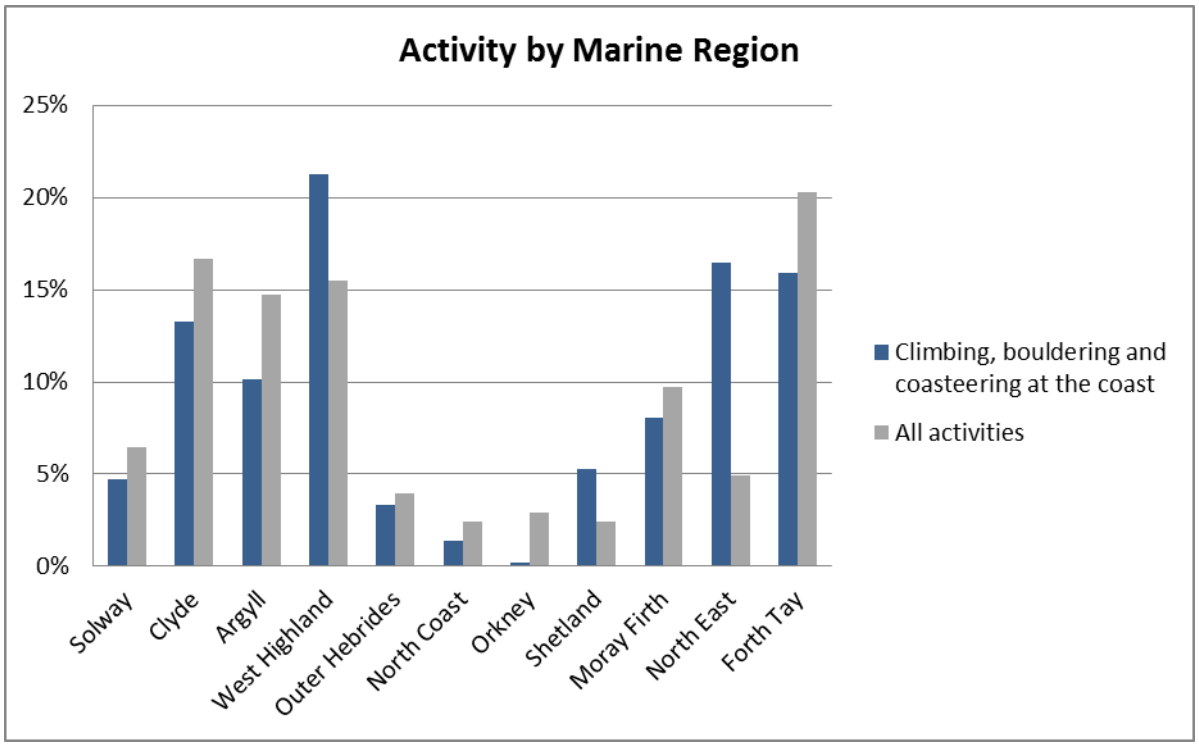
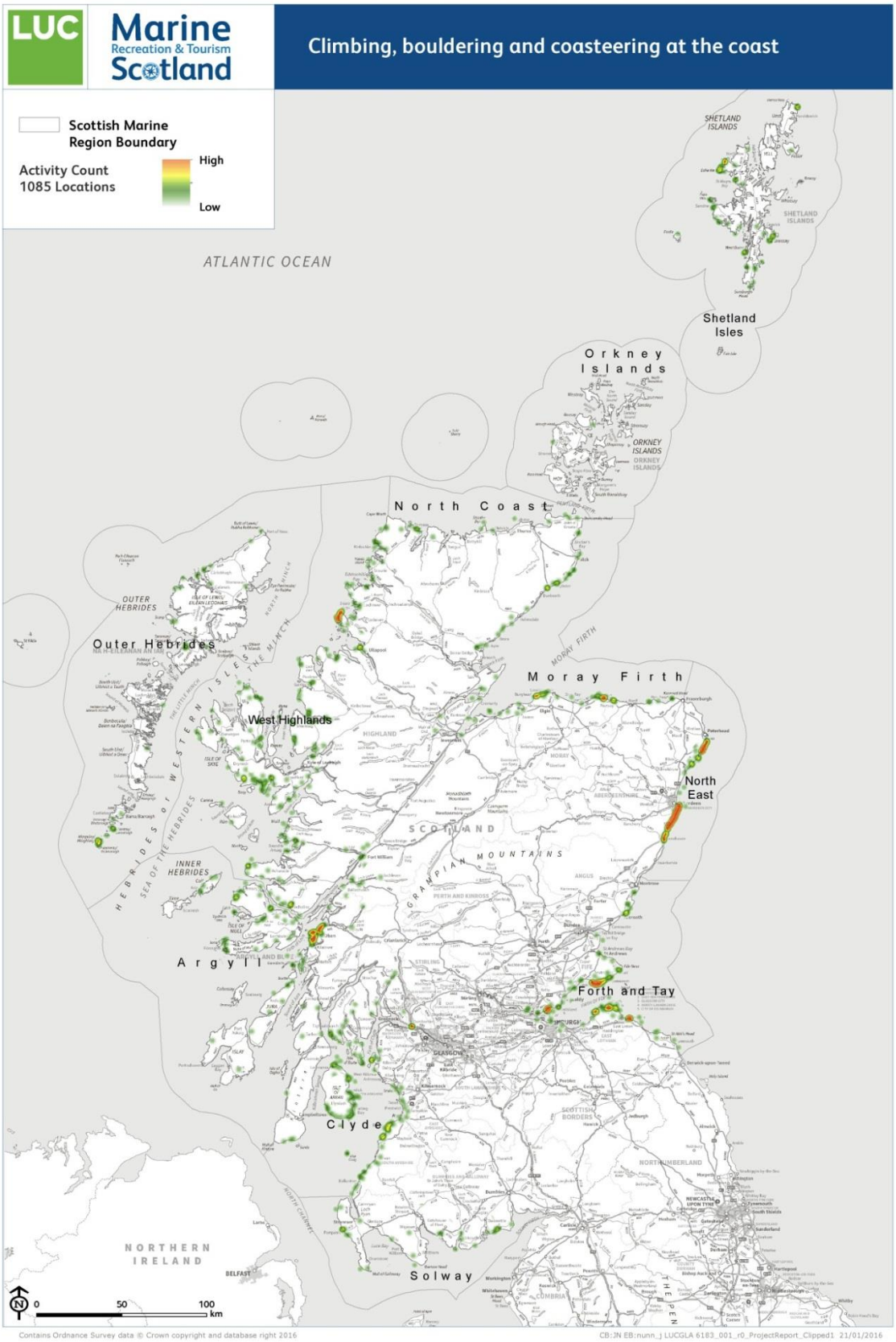
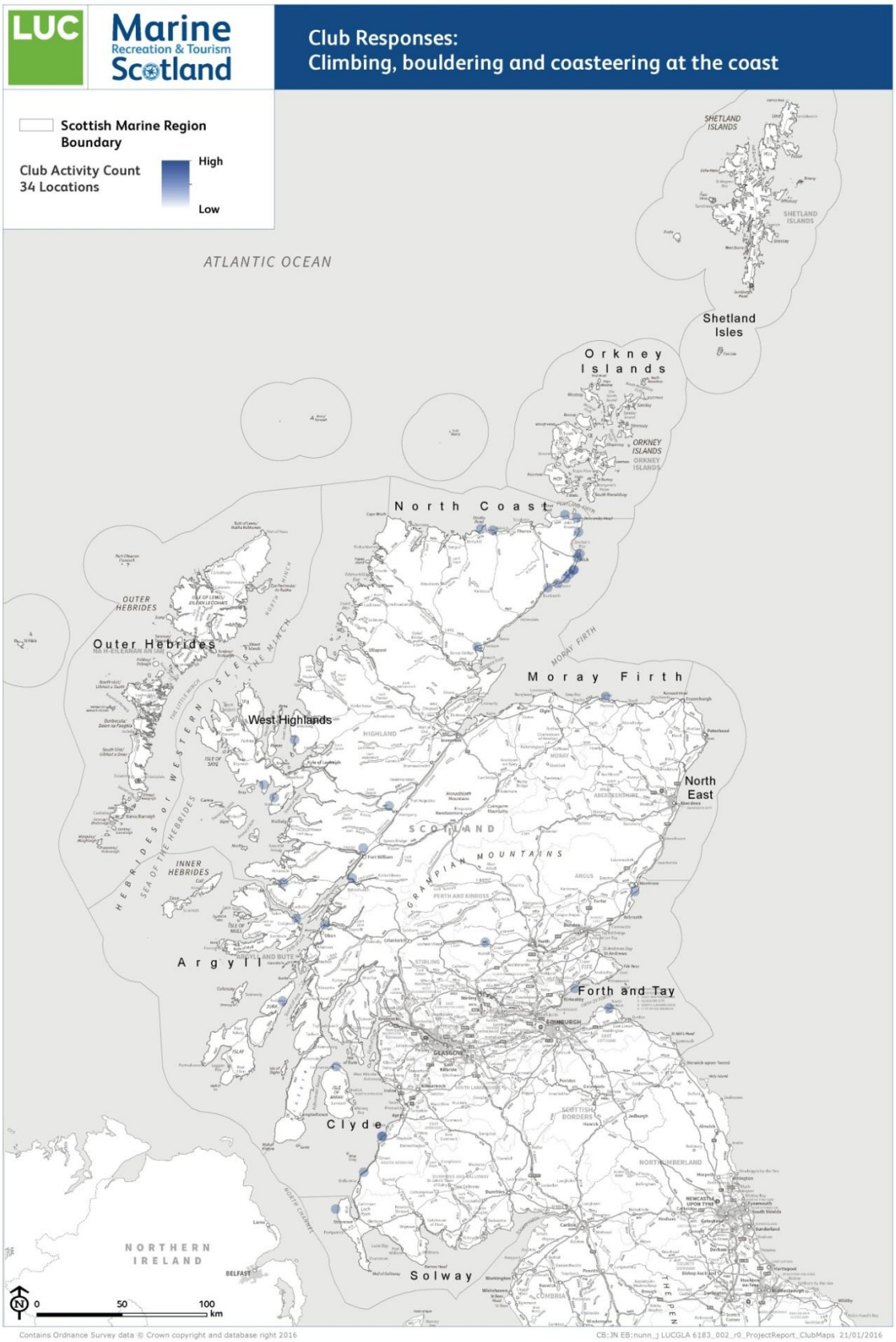


Figure A7.1: Climbing, bouldering and coasteering – spread of activity across Marine Regions (%)



Map A7.1: Climbing, bouldering and coasteering – (230 individual responses)



Map A7.2: Climbing, bouldering and coasteering (9 club responses)

Trip planning

9. Respondents were asked about the factors influencing their decision on where to go climbing, bouldering and coasteering, and about the sources of information they used to inform that decision.

Factors influencing decisions on where to go

10. The occurrence of good locations for climbing, bouldering and coasteering is by far the most important factor in deciding where these respondents go. Other factors include the quality of local scenery, recommendations from friends and family, opportunities to see wildlife and proximity to home.

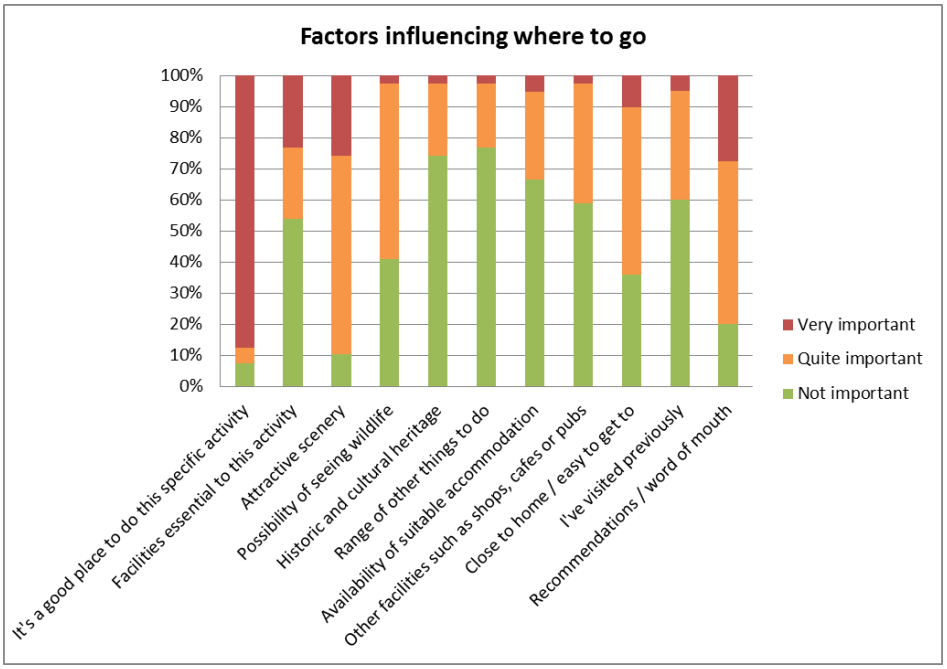


Figure A7.2: Climbing, bouldering and coasteering – factors influencing where to go

Sources of information

11. The most importance source of information for people climbing, bouldering and coasteering are guidebooks and websites, followed by recommendations from friends and family and people's own knowledge of the Scottish coastline. This is in contrast to most other activities where guidebooks in particular are relatively unimportant.

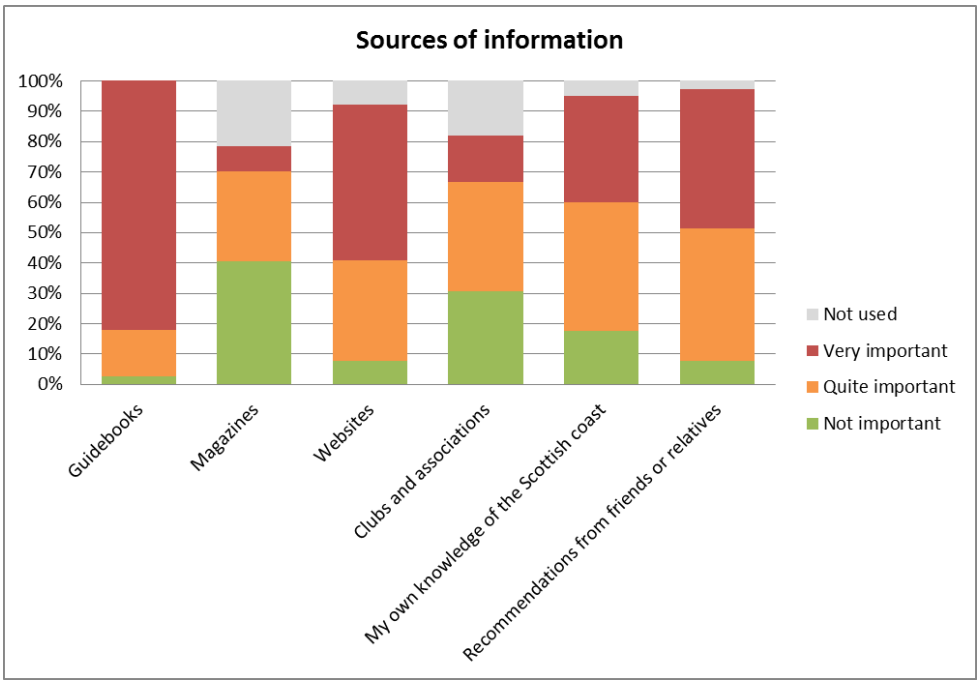


Figure A7.3: Climbing, bouldering and coasteering – sources of information

Characteristics of trip to the coast

Transport to start point

12. Car is by far the most common mode of transport to the start of people's visit to the coast, with around 70% of respondents indicating they always travel that way, and most of the remainder indicating they sometimes go by car. Around 60% of people always or sometimes walk to the coast. Between a fifth and a quarter of respondents sometimes travelled by ferry, train, bus or bicycle.

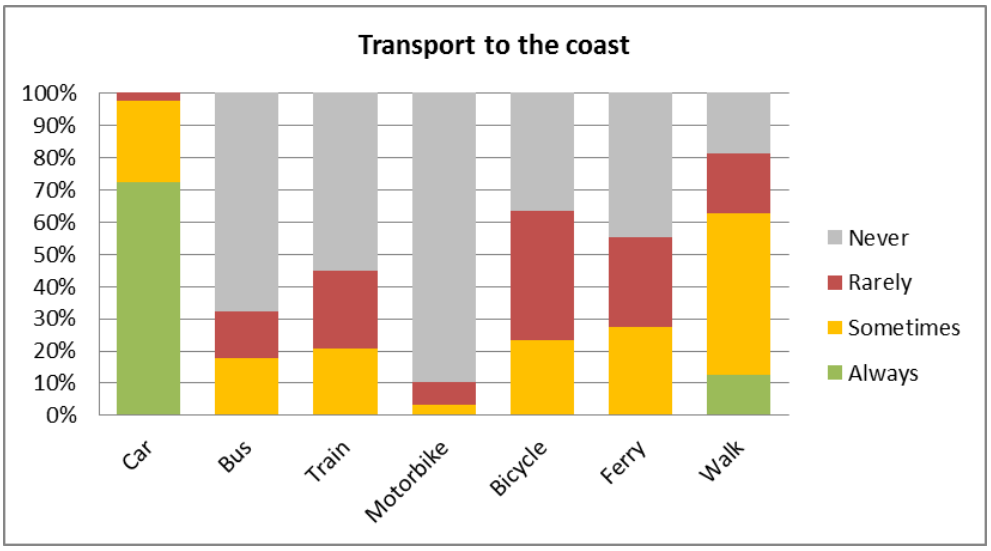


Figure A7.4: Climbing, bouldering and coasteering – transport

Monthly profile of activity

13. **Figure A7.5** shows the frequency of climbing, bouldering and coasteering activity across each month of the year. The graph shows a very strong pattern of seasonality with the proportion of people undertaking this activity at least twice a month rising from less than 20% in January to over 80% in June.

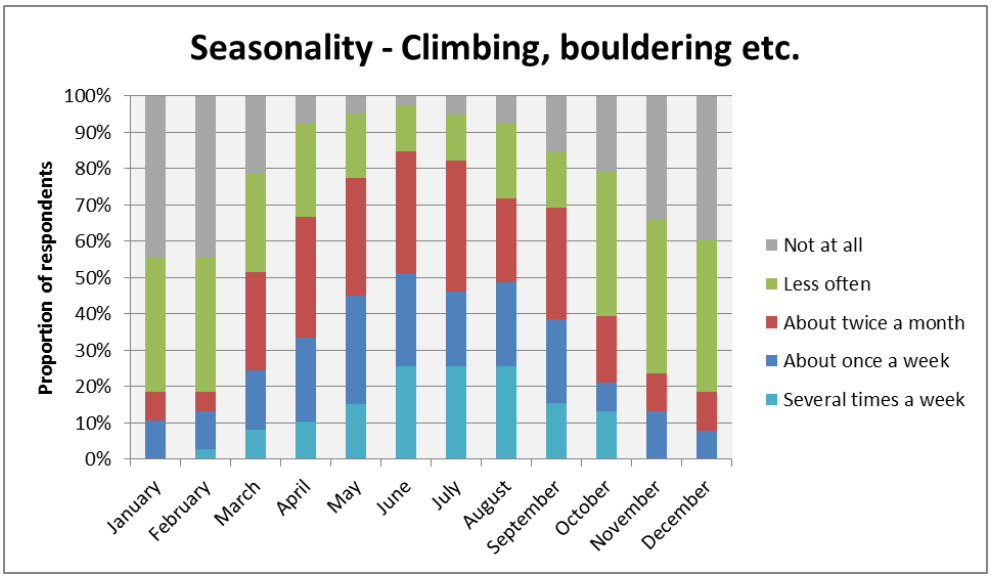


Figure A7.5: Climbing, bouldering and coasteering – seasonality

Trip length

14. People climbing, bouldering and coasteering made an average of around 7 day trips, just over 2 short breaks and 0.9 longer breaks per year. Comparison with the whole survey sample indicates more day trips and short breaks, but fewer longer breaks.

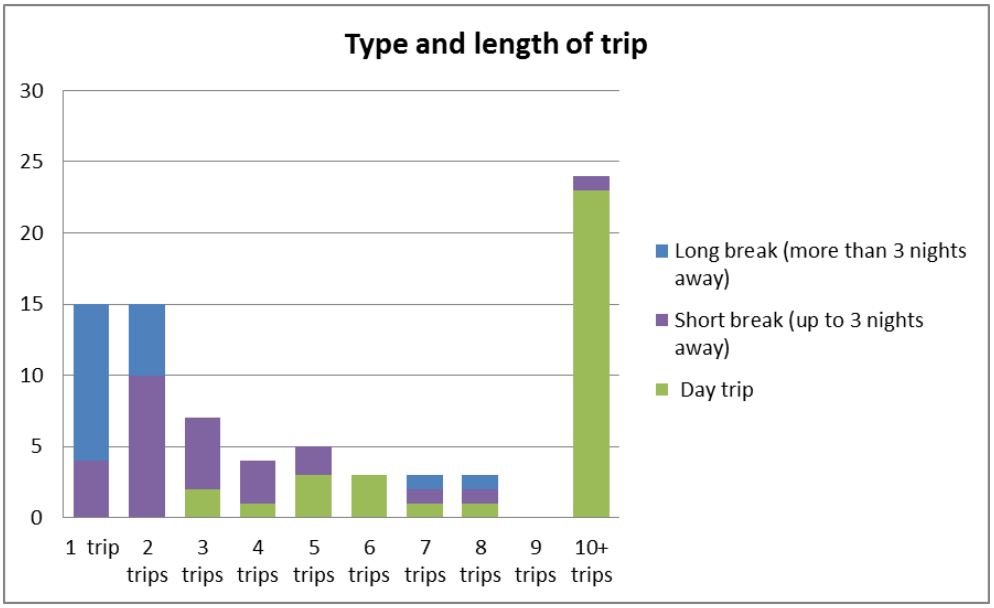


Figure A7.6: Climbing, bouldering and coasteering – type and length of trip

15. The sample of 43 respondents accounts for a minimum of around 288 day trips, 86 short breaks and 36 longer breaks.

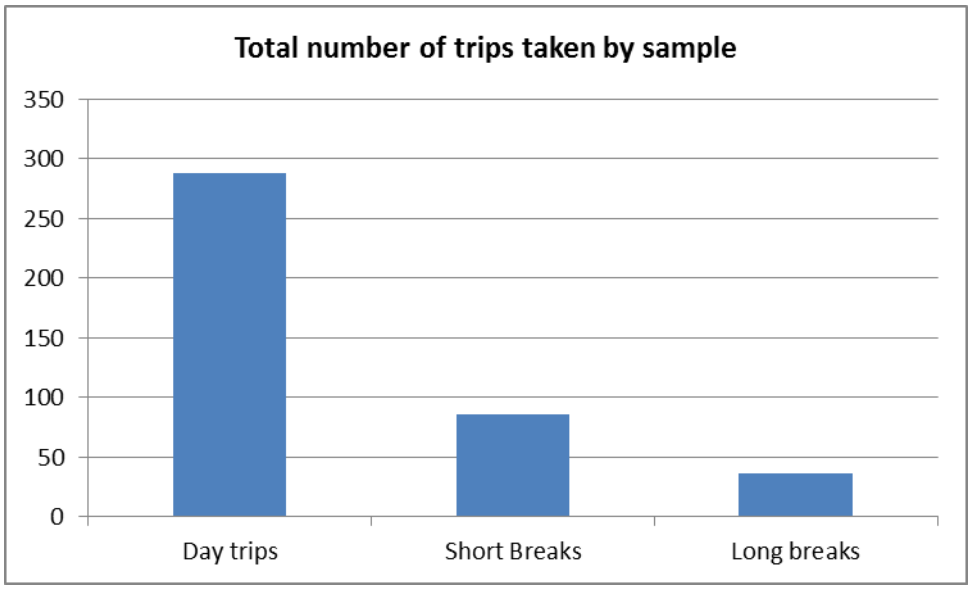


Figure A7.7: Climbing, bouldering and coasteering – number of trips

Accommodation used

16. People provided information on the types of accommodation they typically use. Camping was by far the most commonly used form of accommodation.

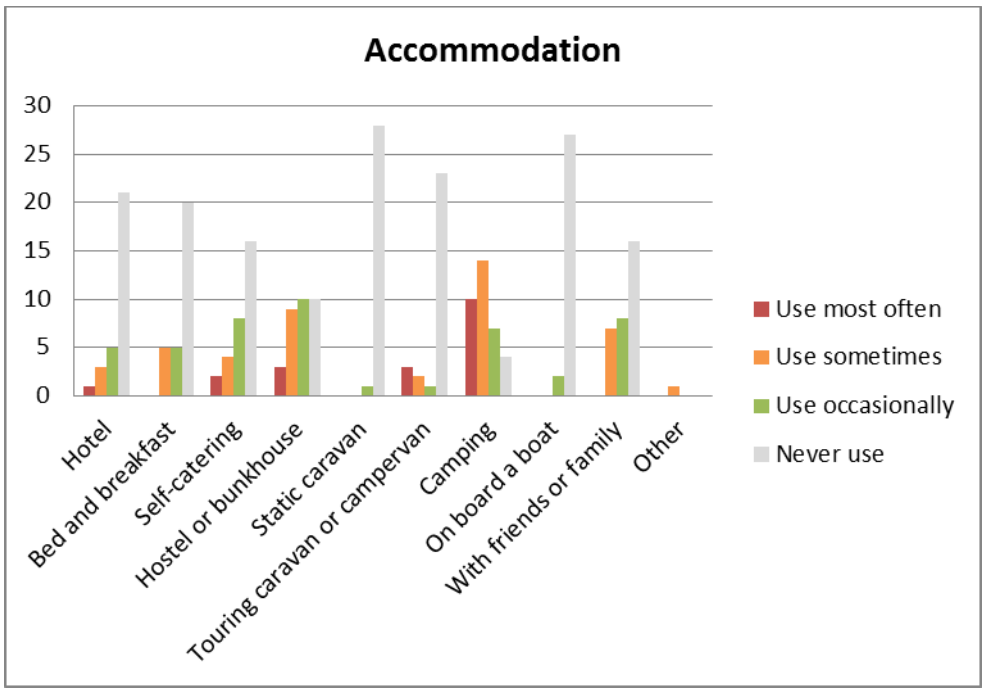


Figure A7.8: Climbing, bouldering and coasteering – accommodation

Improvements to make trip more enjoyable

17. Climbing, bouldering and coasteering respondents tend to identify the need for relatively few improvements. The most commonly cited improvements related to parking and access, transport and on-line information.

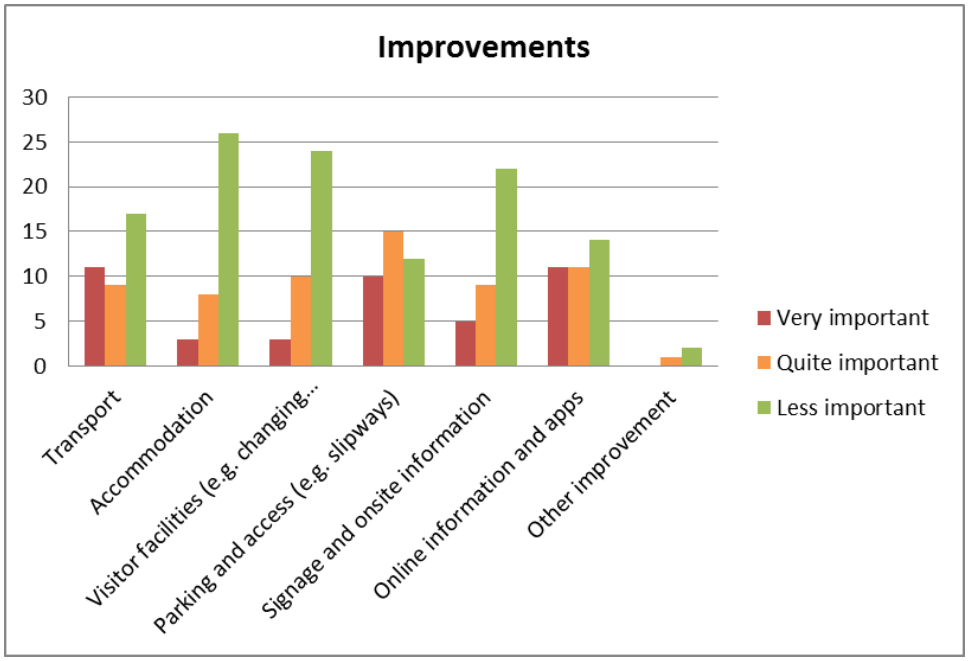


Figure A7.9: Climbing, bouldering and coasteering – improvements

Party

18. 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?

19. **Figure A7.10** suggests that people climbing, bouldering or coasteering are more likely to be with their partner or family and less likely to be with friends than the survey sample as a whole. People were least frequently with members of an organised trip.



Figure A7.10: Climbing, bouldering and coasteering – party

Age groups and gender composition of party

20. Respondents were also asked about the age and gender composition of their party[34]. **Figure A7.11** shows people climbing, bouldering or coasteering tend to be in smaller parties than 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.

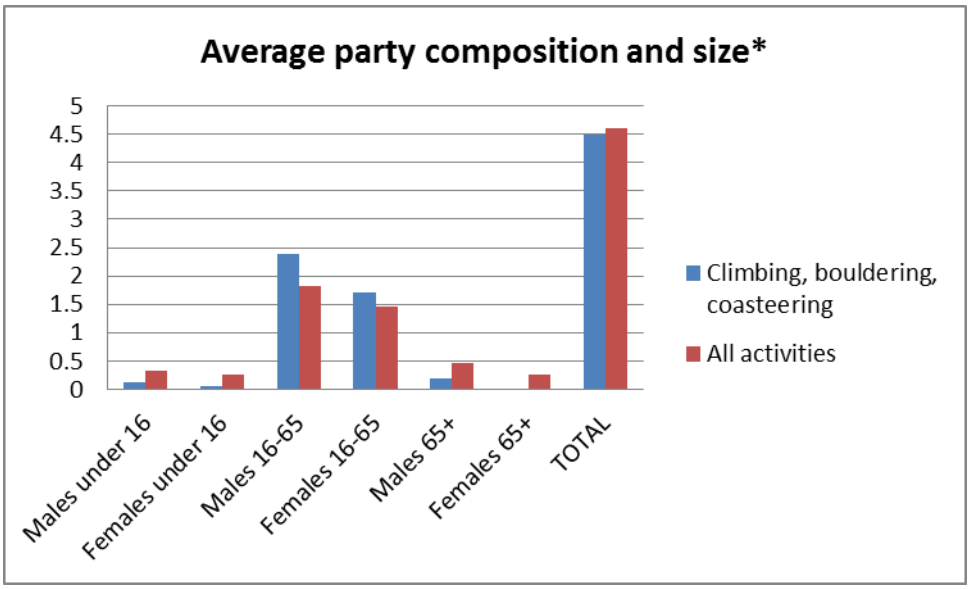


Figure A7.11: Climbing, bouldering and coasteering – party composition

[34] * 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.

Spending

21. 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

22. **Table A7.2** shows the maximum, mean and median daily spending against a series of headings. This analysis suggests a median spend of around £28 per day during climbing trips to the coast. This is based on a small sample of 42 respondents.

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

Table A7. 2: Climbing, bouldering and coasteering – max, mean and median spend per day (£)

	Max(£)	Mean (£)	Median (£)
Petrol/diesel/LPG	50	16.74	13.5
Bus/train fares	50	11.06	4.25
Car parking	5	1.71	1
Overnight accommodation	100	37.31	35
Eating out	80	16.95	12
Food and groceries	30	10.43	10
Entrance to local visitor attractions	50	18.33	5
Mooring or transit fees	10	5	5
Hire of equipment	0	0	0
Maps/guidebooks/leaflets	25	8.54	5
Gifts/souvenirs	30	16.67	20
Other	45	17.20	6
TOTAL	**320**	**49.66**	**28**

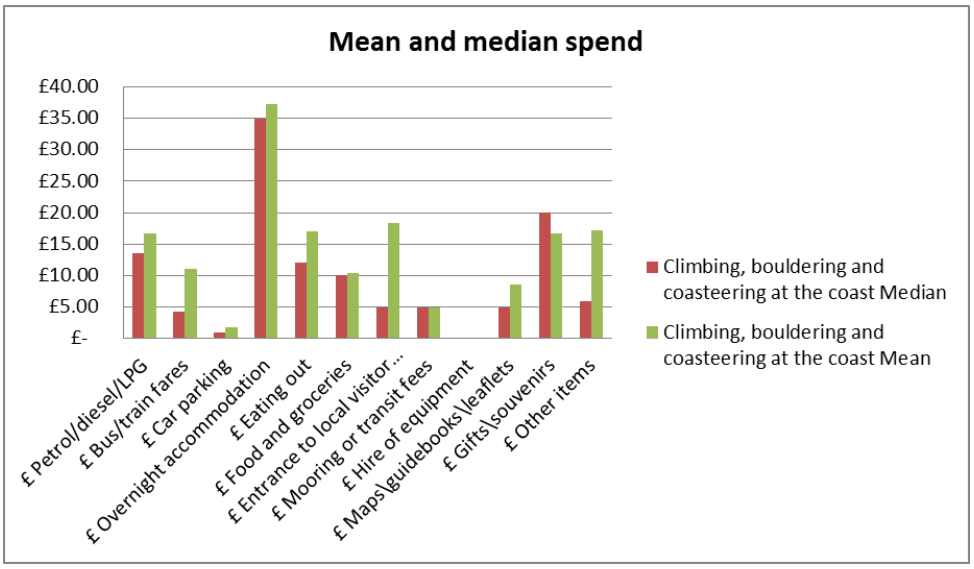


Figure A7.12: Climbing, bouldering and coasteering – mean and median spend per day

Spend per year by category

24. Respondents were also asked to record their annual spending on climbing, bouldering and coasteering. The analysis is based on a small sample of 41. **Table A7.3** 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 climbing, bouldering and coasteering was £260.

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

Table A7.3: Climbing, bouldering and coasteering – max, mean and median spend per year (£)

	Max(£)	Mean (£)	Median (£)
Equipment	1000	282.20	200
Storage	0	0	0
Memberships	400	60.10	45
Insurance	400	95.75	57.50
TOTAL	**1500**	**374.34**	**260**

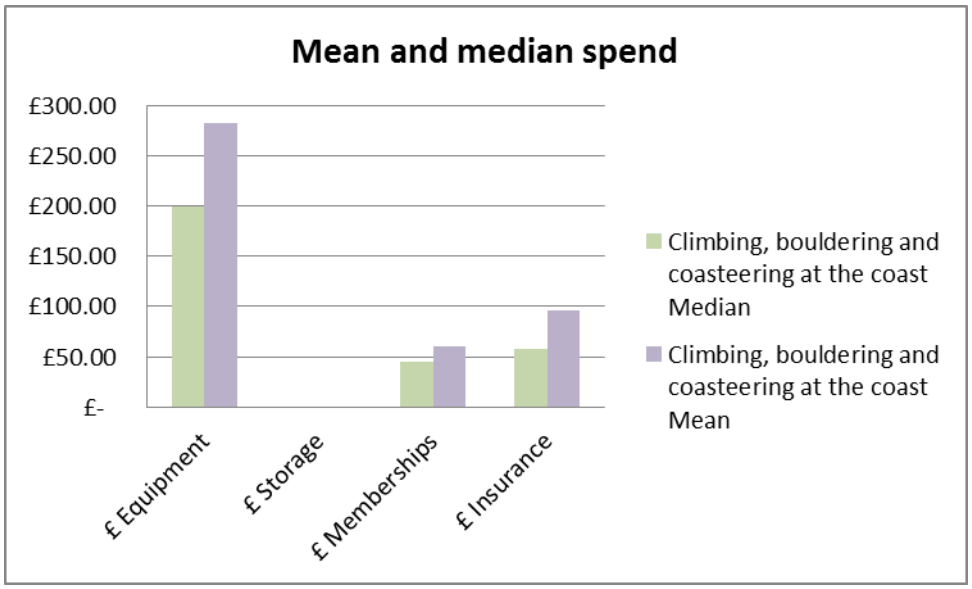


Figure A7.13: Climbing, bouldering and coasteering – mean and median spend per year

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 42 people who answered this question, around 70% belonged to local or national organisations. 26 people listed organisations specific to climbing, including the Mountaineering Council of Scotland, Climb Shetland and the British Mountaineering Council.

Table A7.4: Climbing, bouldering and coasteering – membership of clubs, associations or governing bodies

	Do you belong to any clubs, associations or governing bodies relating to coastal recreation?
Local organisation	12
National organisation	17
None	13
Grand Total	**42**

Awareness of codes of conduct

28. Climbers, boulderers and coasteerers had high levels of awareness of the Scottish Outdoor Access Code (over 90% stating they were definitely or possibly aware) with much lower awareness of other codes of conduct.

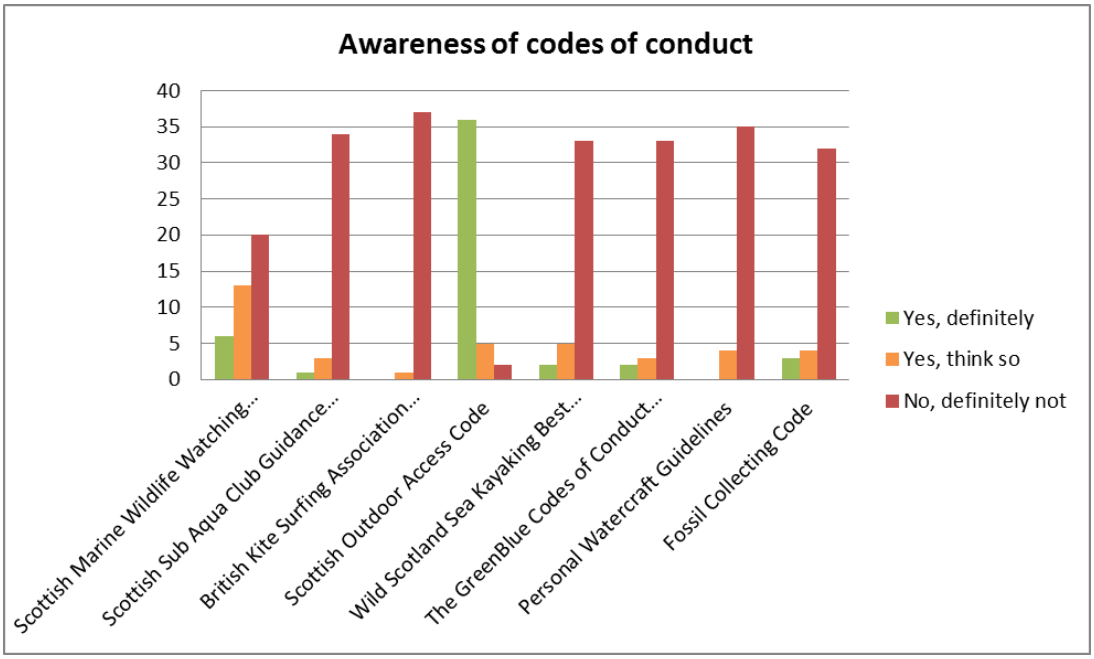


Figure A7.14: Climbing, bouldering and coasteering – codes of conduct

Socio-economic profile

Age and gender

29. **Figure A7.15** shows the age and gender profile of all those who indicated that they had taken part in climbing, bouldering or coasteering on the coast during the past 12 months. This is as distinct from those who included this activity as one of their most important activities. Comparison with the whole survey sample suggests those who took part in climbing, bouldering or coasteering were more likely to be male and with a higher proportion within the 25 to 34 and 35 to 44 age categories.

30. **Figure A7.16** shows the age and gender profile of those who identified climbing, bouldering or coasteering as one of their most important activities. This suggests an even greater concentration within the 25 to 34 age band and a higher proportion of males.

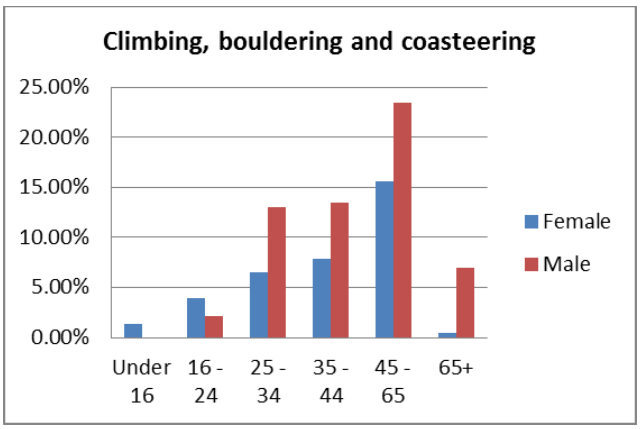


Figure A7.15: Age and gender profile of all participating in climbing, bouldering or coasteering

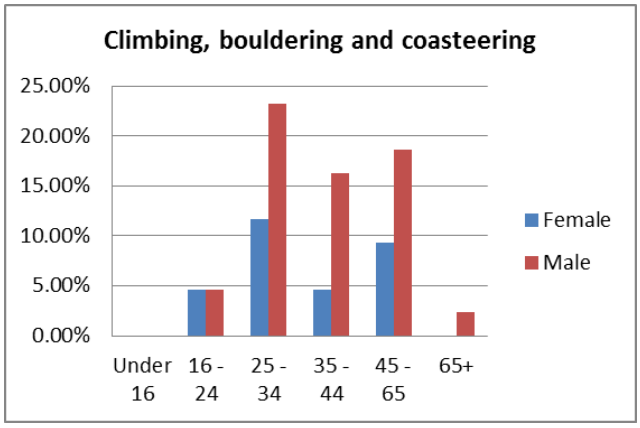


Figure A7.16: Age and gender profile of respondents identifying climbing, bouldering or coasteering as a main activity

Household income

31. Analysis of respondents' household income suggests over half of climbers, boulderers and coasteerers have incomes of £26,000 or more. This is slightly lower than for the survey sample as a whole, but indicates incomes higher than the Scottish household average (2014) of around £23,000.

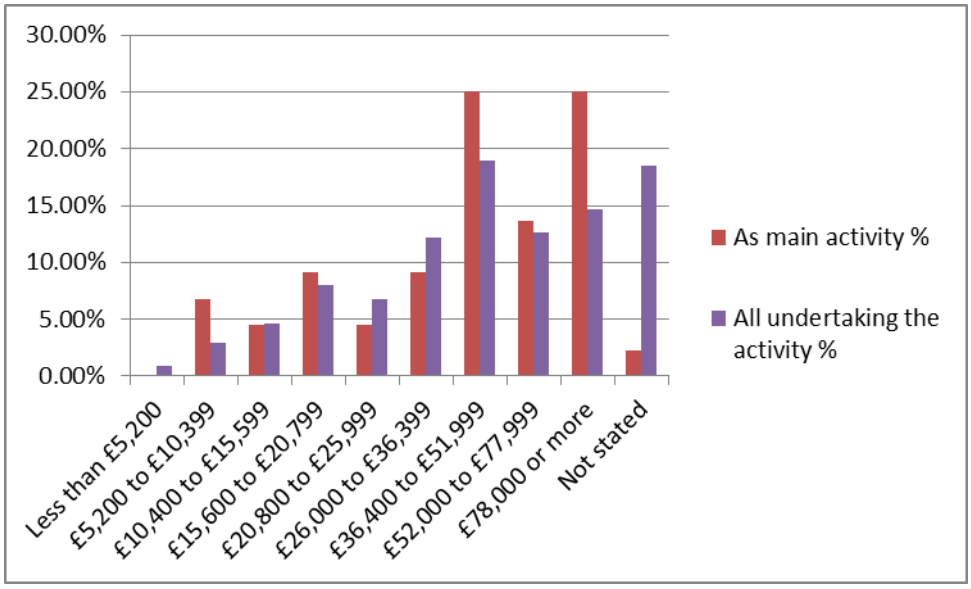


Figure A7.17: Climbing, bouldering and coasteering – household income

Business survey findings

32. 26 of the 279 respondents in the business survey stated that their business served climbing, bouldering and coasteering. **Figure A7.18** 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.

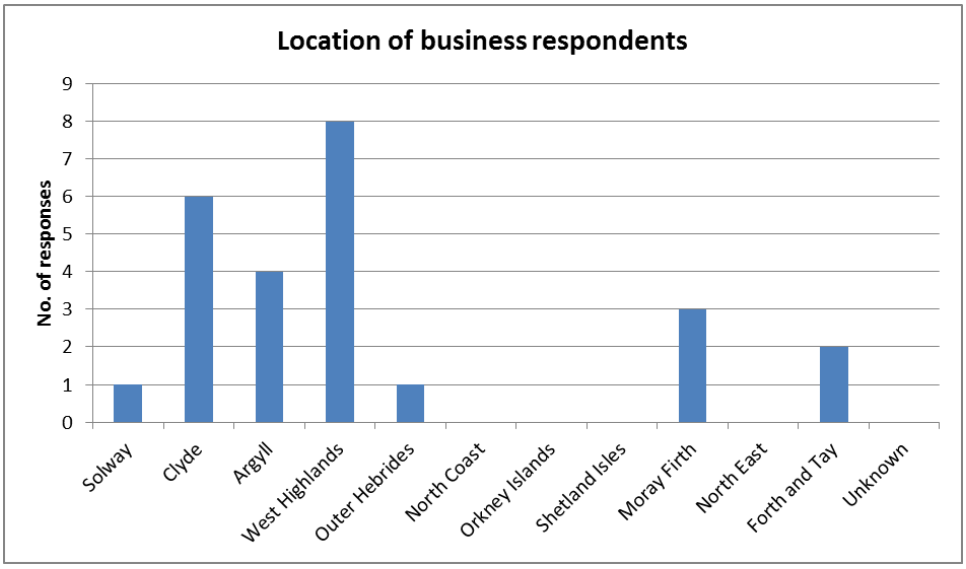


Figure A7.18: Distribution of the businesses across Marine Regions

33. Business respondents were asked to indicate the kinds of services they provide. **Figure A7.19** shows the services provided by businesses serving climbing, bouldering and coasteering.

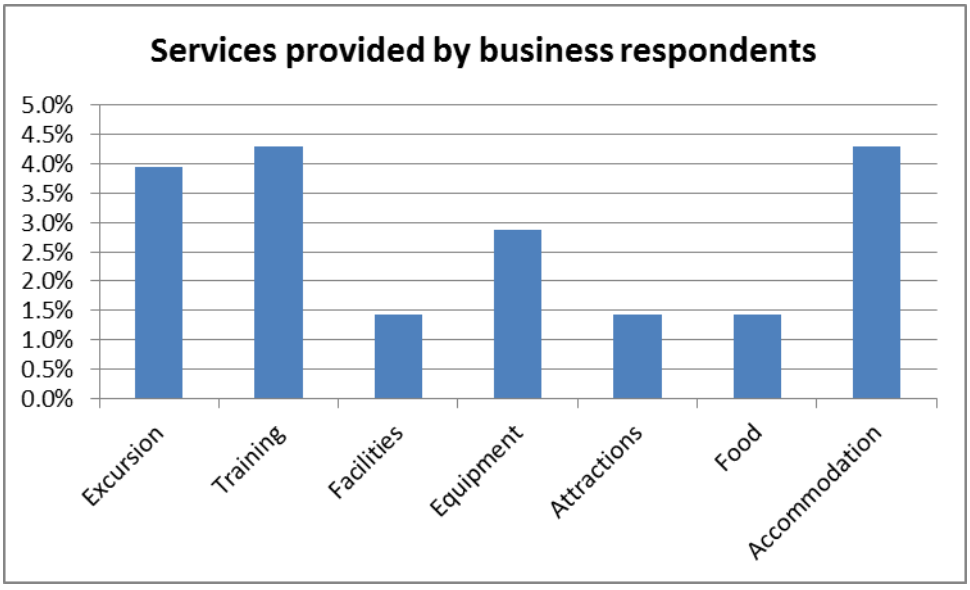


Figure A7.19: Services provided by businesses serving climbing, bouldering and coasteering