Appendix 9
SCUBA diving in the sea



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Table A9.1: 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 recreational SCUBA diving 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. An additional eleven clubs provided spatial information on SCUBA diving. 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 **168** people provided spatial information on SCUBA diving, representing around 7% of the total sample. **106** people identified SCUBA diving as one of their most important activities, representing around just under 5% of the total sample.
4. These are good samples meaning that confidence in the analysis of responses 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.
5. Around 63% of those who provided spatial data on SCUBA diving identified it as one of their most important activities.
6. Based on the sample of people who provided spatial information, around 35% of respondents lived within a mile of the Scottish coastline, 20% between one and five miles and 21% more than five miles. The remaining 24% of respondents came from outside Scotland – a higher proportion than for most activities.

Spatial data

7. People completing the survey identified 2186 locations where they had SCUBA diving. This information has been used to generate a heat map showing the concentration of SCUBA diving around the Scottish coast (see **Map A9.1**). **Map A9.2** shows the spatial information provided by club survey responses. The maps show key concentrations of dive activity in locations including Scapa Flow, the Sound of Mull, sea lochs in Argyll, the southern coast of Arran and Lothian coastline. These maps are available on Marine Scotland's National Marine Plan Interactive (NMPi) website (https://marinescotland.atkinsgeospatial.com/nmpi/).

8. **Figure A9.1** shows the percentage distribution of SCUBA diving across Marine Regions. It shows concentrations of activity in the Clyde, Argyll, West Highland and Forth and Tay Marine Regions. Orkney Marine Region has a much greater concentration of activity than for the survey sample as a whole. Conversely, Moray Firth, the North East and North Coast have much lower concentrations of activity than for all activities combined.

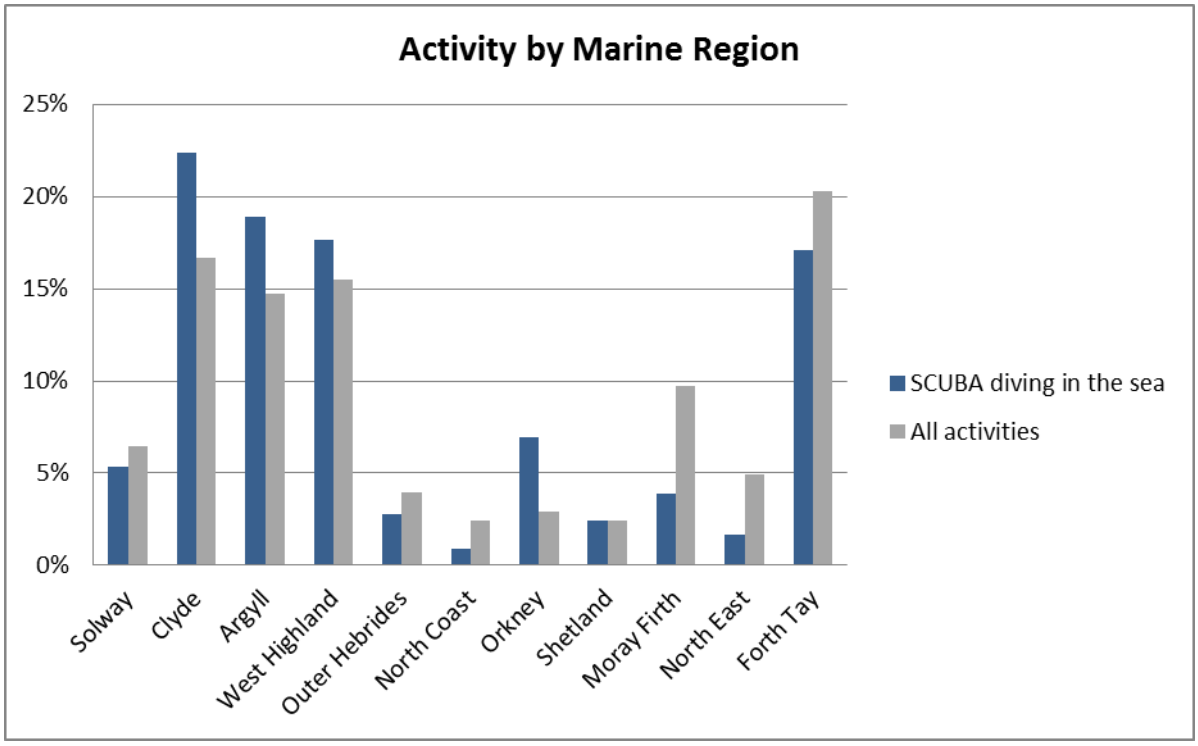
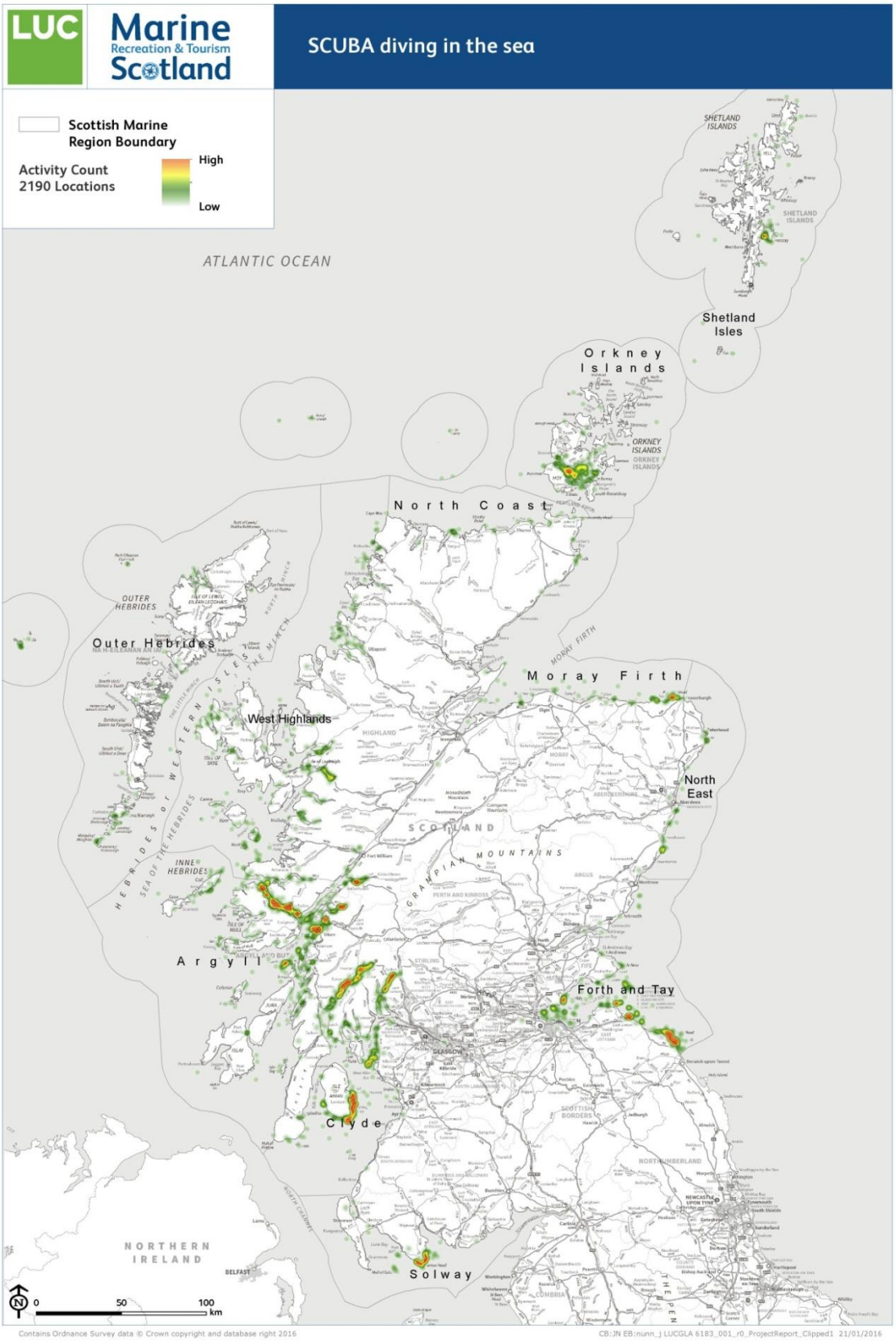
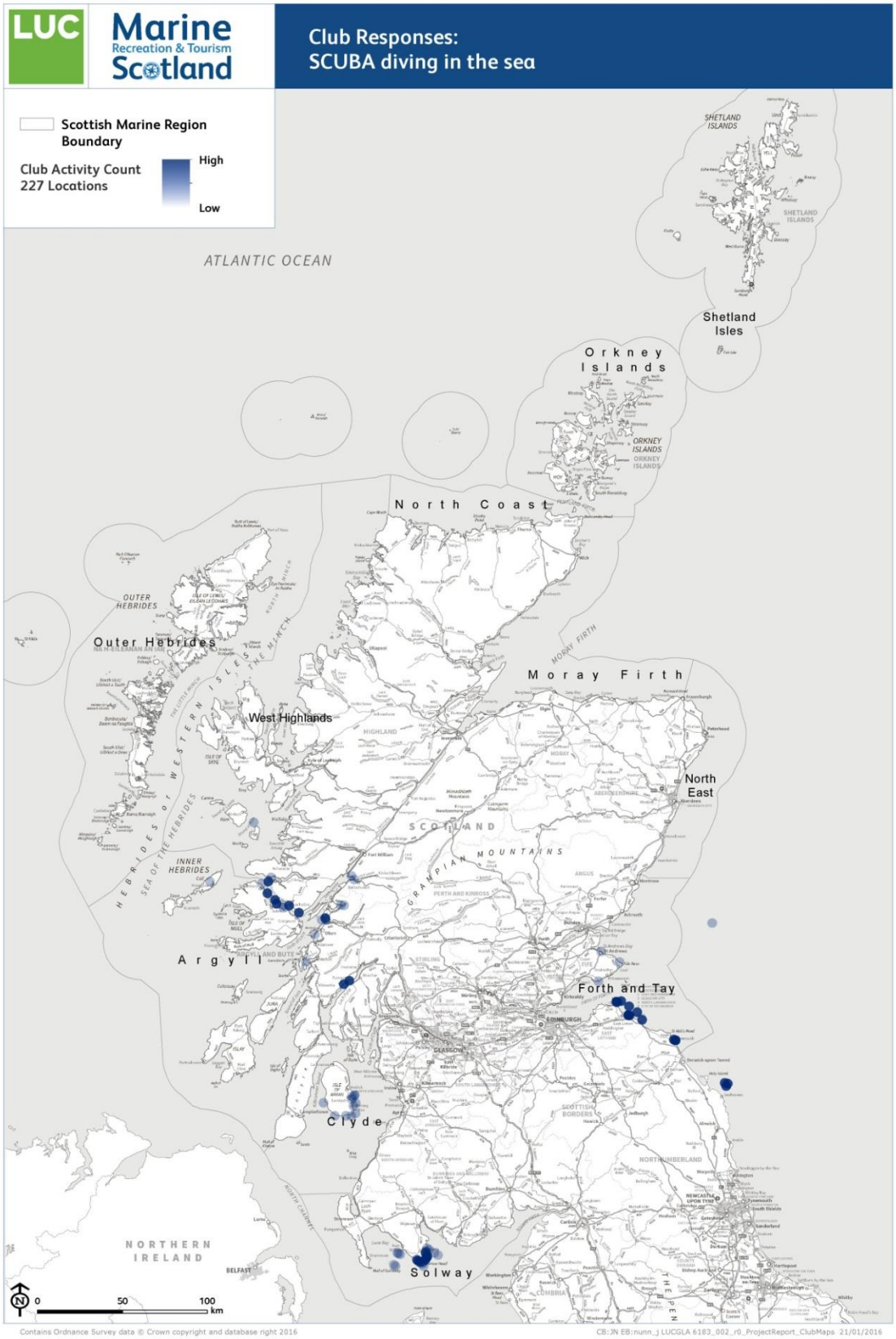


Figure A9.1: SCUBA diving – spread of activity across Marine Regions (%)



Map A9.1: Scuba diving (168 individual responses)



Map A9.2: Scuba diving (11 club responses)

Trip planning

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

Factors influencing decisions on where to go

10. The occurrence of good dive sites is by far the most important factor in deciding where these respondents go. Other factors include opportunities to see wildlife, the presence of facilities for diving and the quality of local scenery.

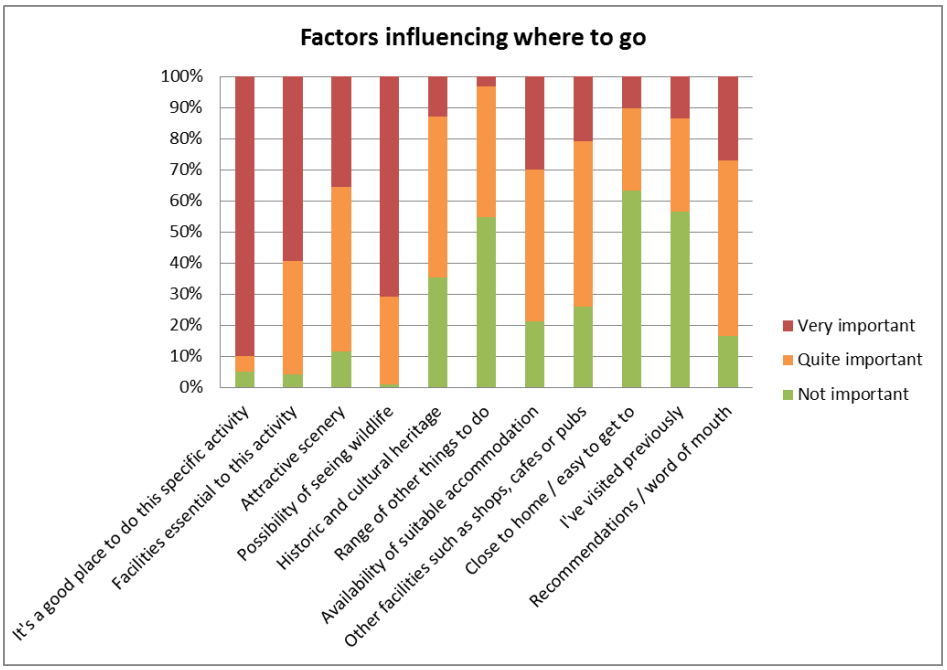


Figure A9.2: SCUBA diving – factors influencing where to go

Sources of information

11. The most importance source of information for SCUBA divers were recommendations from friends and family, clubs and associations, people's own knowledge of the Scottish coastline and web based information. Guidebooks and magazines are relatively unimportant.

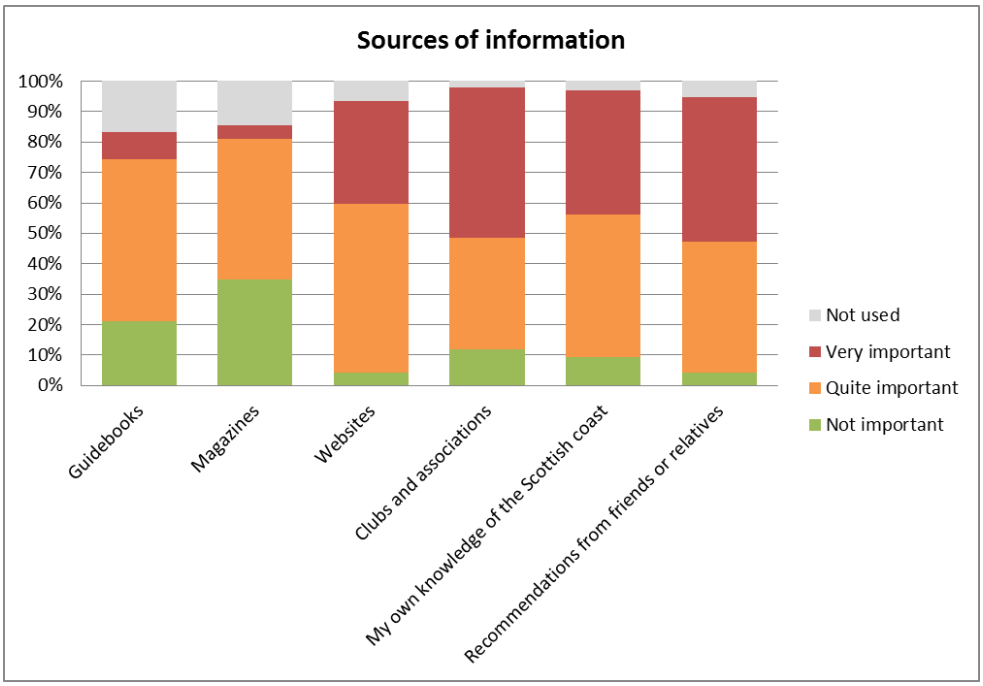


Figure A9.3: SCUBA diving – sources of information

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 90% of respondents indicating they always travel that way, and most of the remainder indicating they sometimes go by car. Around 60% of people sometimes use a ferry as part of their journey. Very small numbers travel by bus, train and bicycle or on foot, reflecting the equipment requirements of this activity.

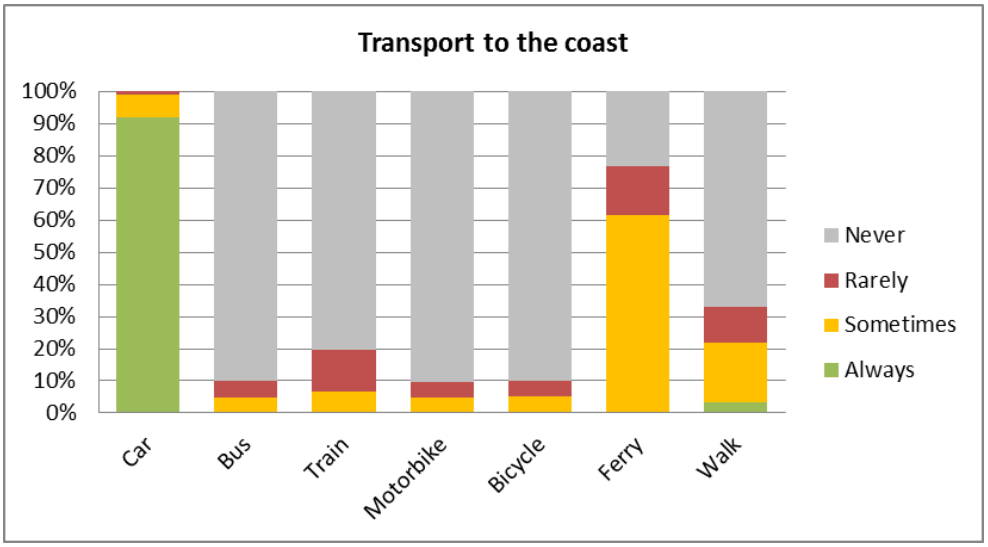


Figure A9.4: SCUBA diving – transport

Monthly profile of activity

13. **Figure A9.5** shows the frequency of SCUBA diving activity across each month of the year. Although there is marked seasonality, with greatest activity between May and September, around 40% of respondents dive at least twice a month during January and December.

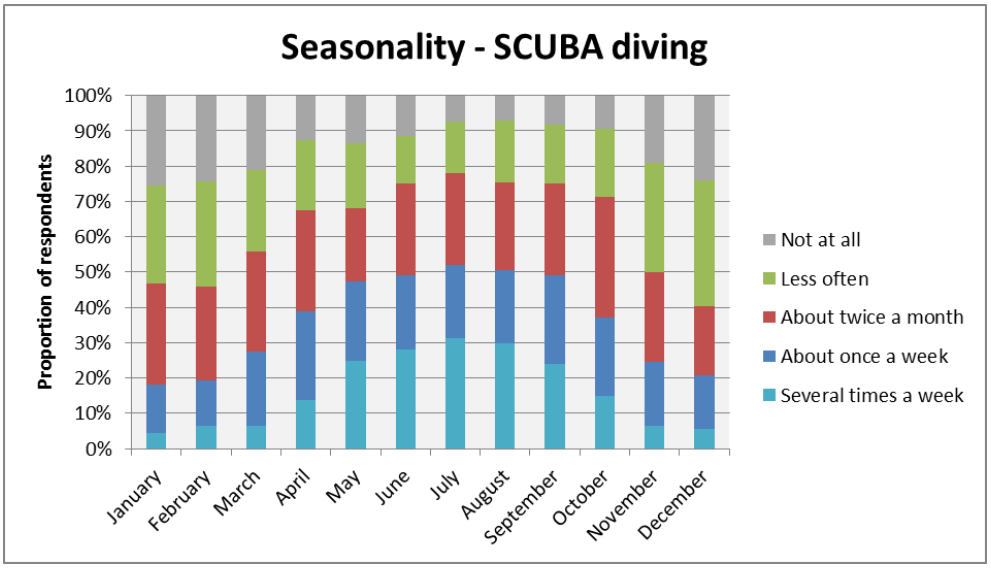


Figure A9.5: SCUBA diving – seasonality

Trip length

14. SCUBA divers made an average of around 5 day trips, just over 2 short breaks and 1.5 longer breaks per year. This is similar to the whole survey sample.

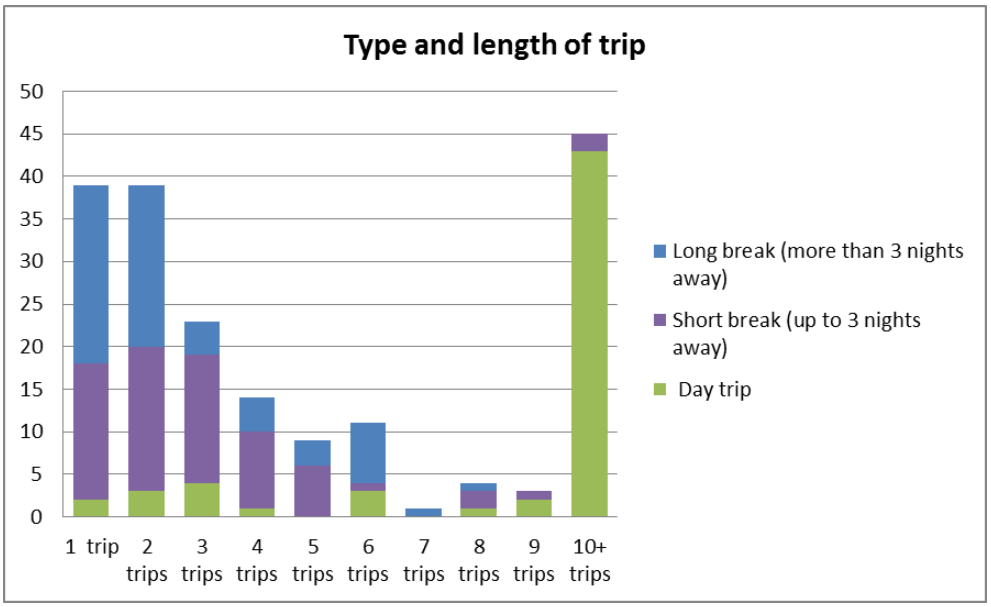


Figure A9.6: SCUBA diving – type and length of trip

15. The sample of 106 respondents accounts for a minimum of around 498 day trips, 212 short breaks and 159 longer breaks.

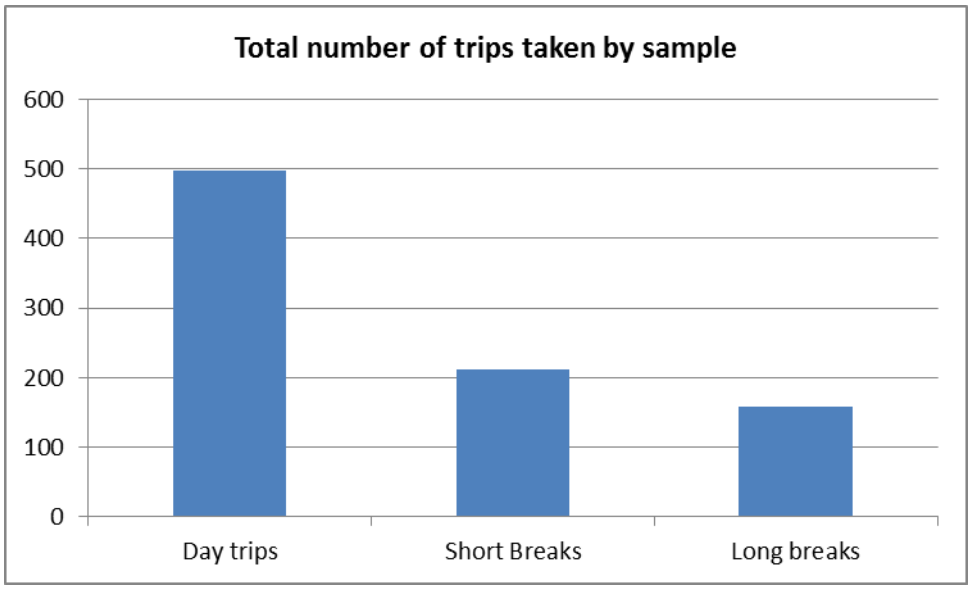


Figure A9.7: SCUBA diving – total number of trips

Accommodation used

16. People provided information on the types of accommodation they typically use. The most popular categories were self-catering, staying on board a boat, bed and breakfast and hostels or bunkhouses.

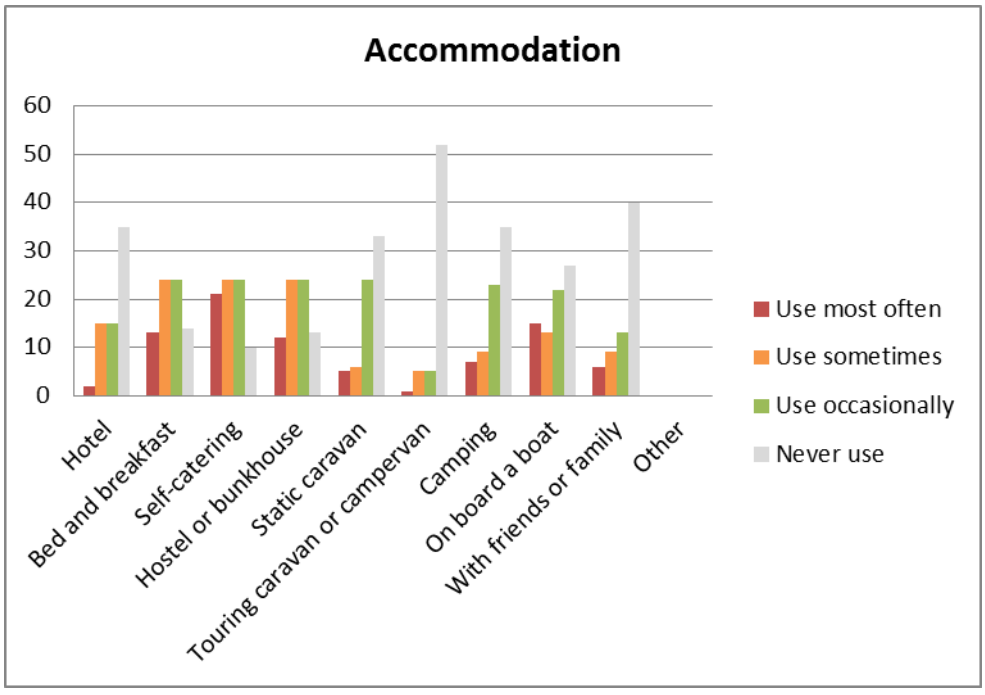


Figure A9.8: SCUBA diving – accommodation

Improvements to make trip more enjoyable

17. By far the most common area for improvement cited by SCUBA divers was parking and access.

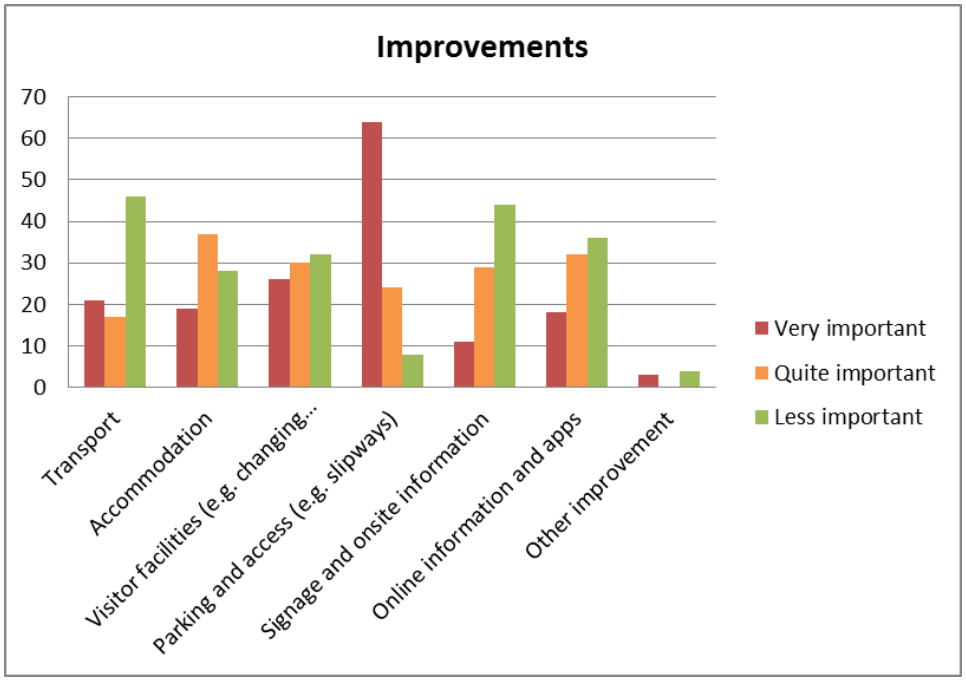


Figure A9.9: SCUBA diving – improvements

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 A9.10** suggests that SCUBA divers 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.

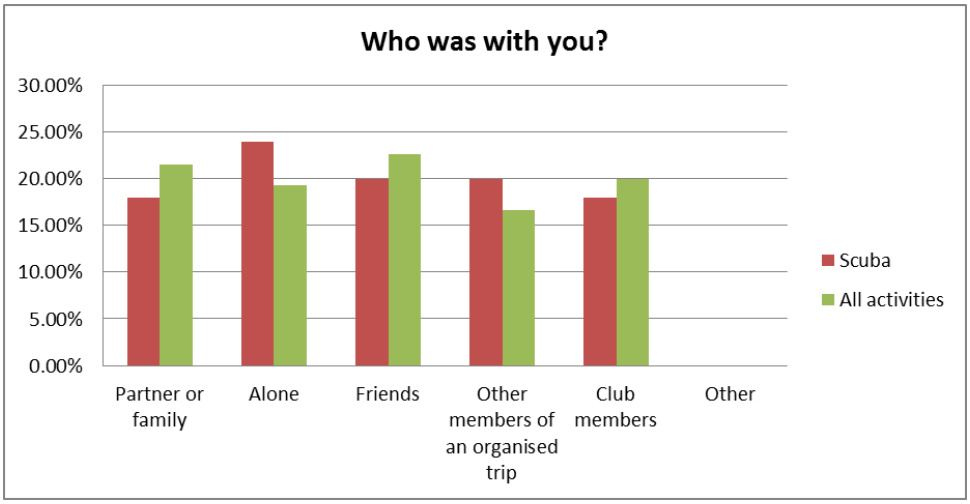


Figure A9.10: SCUBA diving – party

Age groups and gender composition of party

20. Respondents were also asked about the age and gender composition of their party[35]. **Figure A9.11** shows divers tend to be in much larger 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.

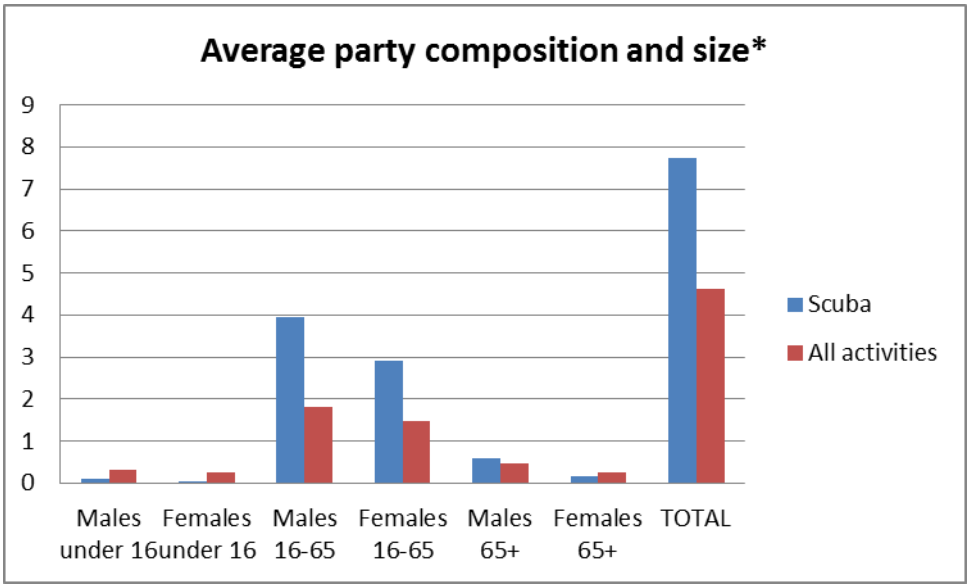


Figure A9.11: SCUBA diving – party composition and size

Spending

21. People completing the survey were asked to provide information on how much they spent during their last SCUBA diving visit to the coast, and how much they typically spend each year.

Spend per day during visit by category

22. **Table A9.2** shows the maximum, mean and median daily spending against a series of headings. This analysis suggests a median spend of around £70 per day during SCUBA diving trips to the coast.

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

[35] * 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 A9.2: SCUBA – max, mean and median spend per day (£)

	Max(£)	Mean (£)	Median (£)
Petrol/diesel/LPG	150	26	20
Bus/train fares	19	3	0
Car parking	15	5	5
Overnight accommodation	150	37	30
Eating out	100	21	20
Food and groceries	50	14	10
Entrance to local visitor attractions	15	5	5
Mooring or transit fees	50	13	10
Hire of equipment	120	21	10
Maps/guidebooks/leaflets	15	5	5
Gifts/souvenirs	40	7	5
Other	300	28	10
TOTAL	**410**	**83**	**70**

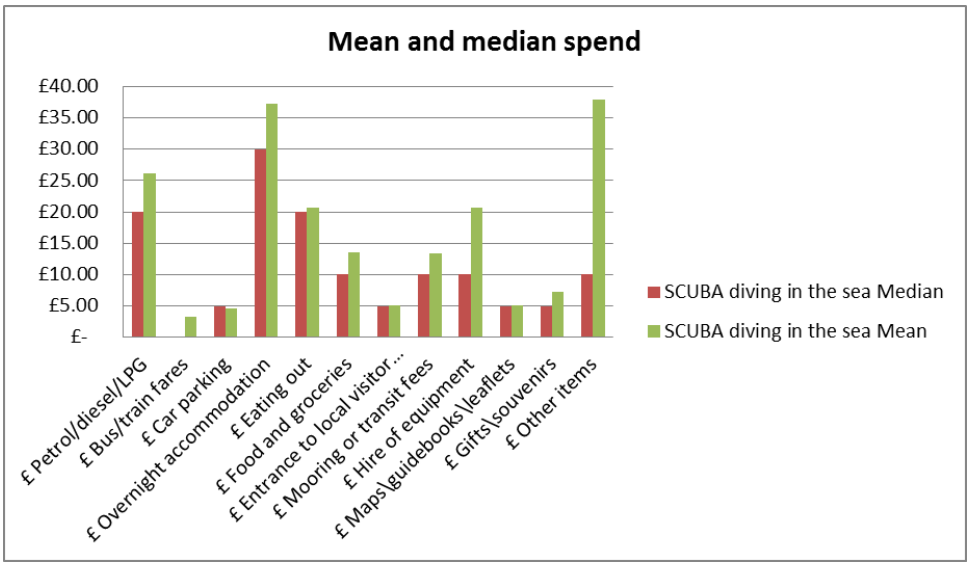


Figure A9.12: SCUBA diving – mean and median daily spend

Spend per year by category

24. Respondents were also asked to record their annual spending on diving**.** **Table A9.3** 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 SCUBA diving was £400.

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

Table A9.3: SCUBA – max, mean and median spend per year (£)

	Max(£)	Mean (£)	Median (£)
Equipment	3500	355	225
Storage	350	112	50
Memberships	400	129	130
Insurance	600	106	60
TOTAL	**4050**	**533**	**400**

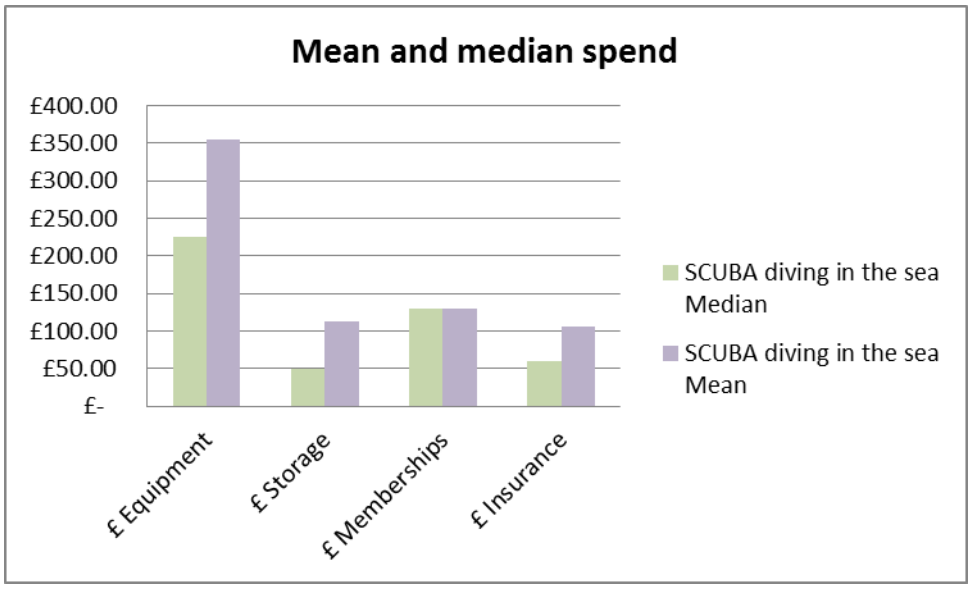


Figure A9.13: SCUBA diving – mean and median annual spend

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 100 people who answered this question, 90% were a member of a local or national organisation. Membership of a national organisation was most common. Listed examples included the British Sub Aqua Club, Scottish Sub Aqua Club, Ellon Sub Aqua Club and University of Nottingham Sub Aqua Clubs.

Table A9.4: SCUBA – membership of local or national organisations

	Do you belong to any clubs, associations or governing bodies relating to coastal recreation?
Local organisation	16
National organisation	74
None	10
Grand Total	**100**

Awareness of codes of conduct

28. SCUBA divers had high awareness of the Scottish Sub Aqua Club Guidance for Divers, the Scottish Marine Wildlife Watching Code and the Scottish Outdoor Access Code.

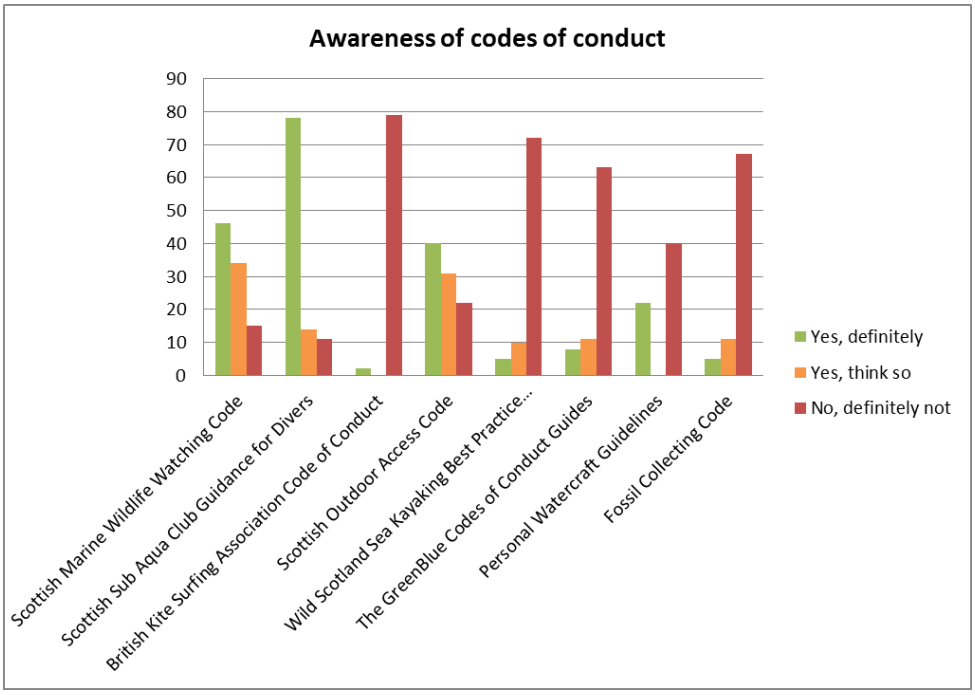


Figure A9.14: SCUBA diving – codes of conduct

Socio-economic profile

Age and gender

29. **Figure A9.15** shows the age and gender profile of all those who indicated that they had taken part in SCUBA diving during the past 12 months. This is as distinct from those who included diving as one of their most important activities. Comparison with the whole survey sample suggests divers were more likely to be male and with a slightly higher proportion within the 45 to 65 age category.

30. **Figure A9.16** shows the age and gender profile of those who identified diving as one of their most important activities. This suggests an even greater proportion of men in the 45 to 65 age category.

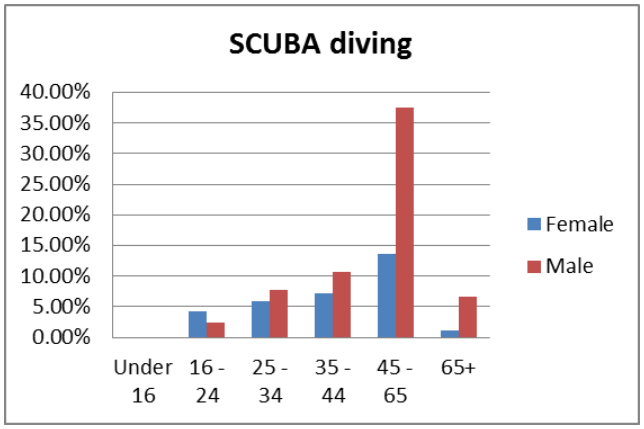


Figure A9.15: Age and gender profile of all participating in diving

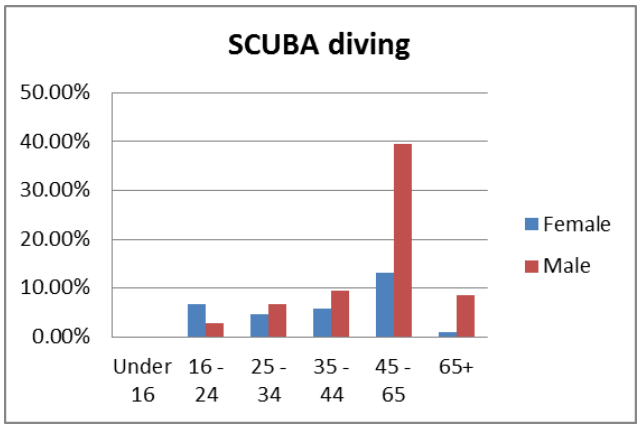


Figure A9.16: Age and gender profile of respondents identifying diving as a main activity

Household income

31. Analysis of respondents' household income suggests over half of divers 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.

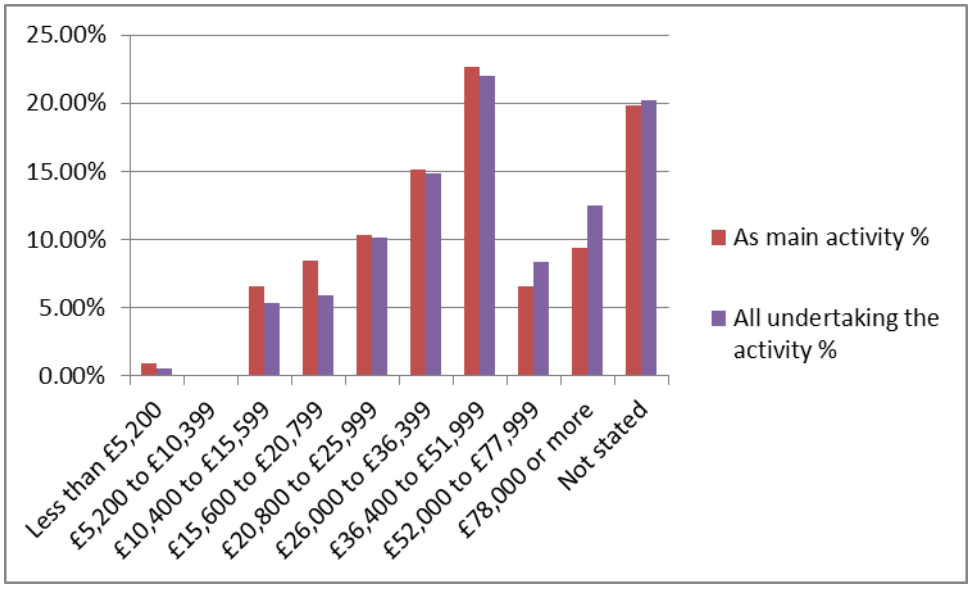


Figure A9.17: SCUBA diving – household income

Business survey findings

32. 34 of the 279 respondents in the business survey stated that their business serves SCUBA diving. **Figure A9.18** 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.

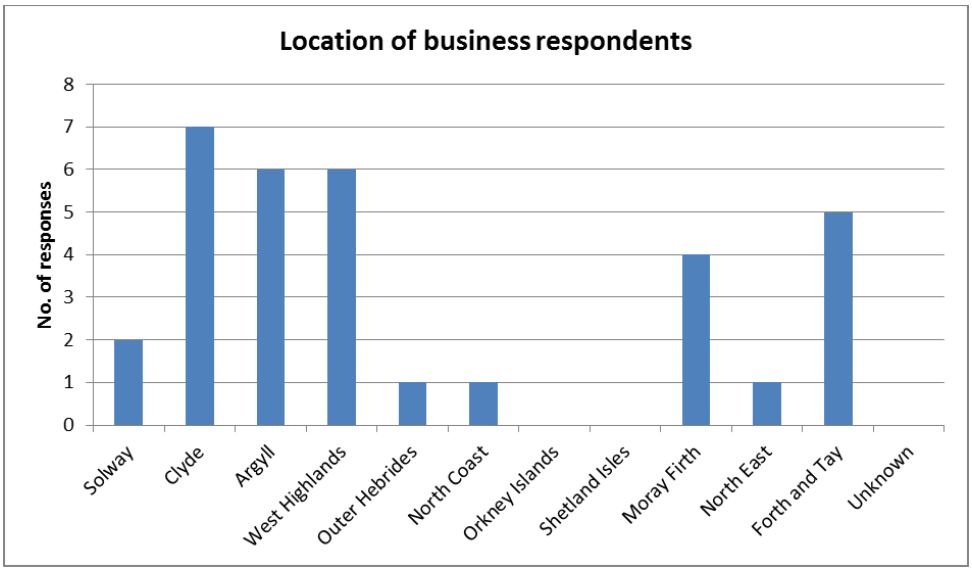


Figure A9.18: Distribution of the businesses across Marine Regions

33. Business respondents were asked to indicate the kinds of services they provide. **Figure A9.19** shows the services provided by businesses serving SCUBA diving.

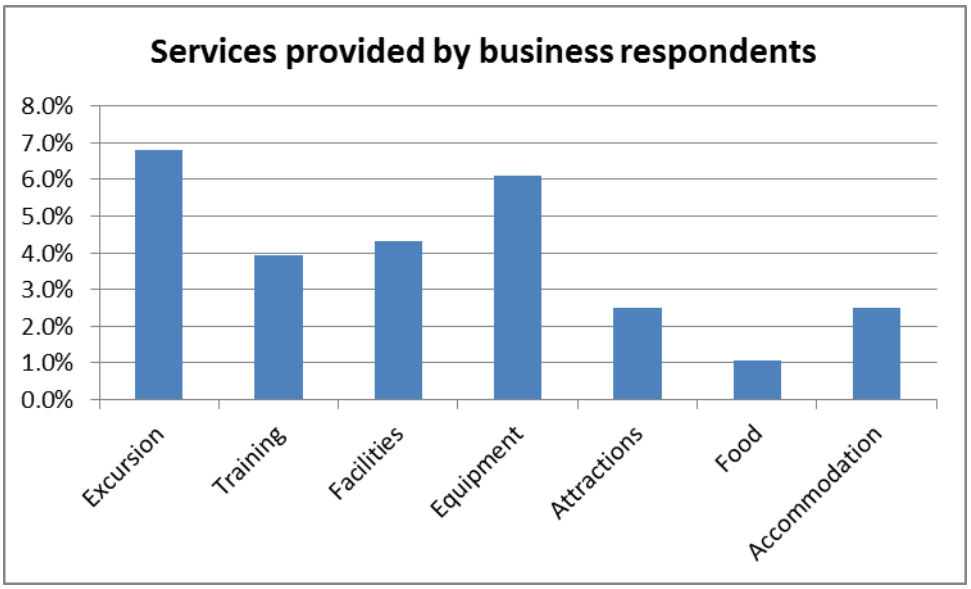


Figure A9.19: Services provided by businesses serving SCUBA diving