Coastal Tourism in Scotland: Seas the Day!

Exploring the appeal of Scotland's coastal destinations for visitors

Topic Paper | June 2021

Duncansby Head, Highlands

Welcome

Scotland's coasts and waters have shaped our culture, our history and our way of life for thousands of years. From our stunning beaches and coastlines to our inland waterfalls, lochs and rivers, Scotland's bountiful supply of water has supported our farming and fishing industries, contributed to our industrial heritage by powering canals and mills, and along with peat and barley, continues to provide a critical ingredient for our whisky making.

Celebrating our coasts and waters
2020 was designated Scotland's Year of Coasts and Waters (YCW) and a year-long programme of events and activities were planned to celebrate our maritime heritage, our food and drink, our cultural heritage and our wildlife. The COVID-19 pandemic and associated travel restrictions impacted much of this planned activity, and as such, a decision was made in May 2020 to extend the year into 2021.

As detailed throughout this paper, Scotland's coastal destinations will play a vital role in the recovery of international inbound and domestic tourism following the COVID-19 pandemic.

Findhorn Beach, Moray Speyside

The recreational asset value of Coastal Regions, Lochs & Reservoirs and Rivers and Canals to Scotland's economy is calculated at **£13.7 billion**

(Source ONS).

Using insight to inform our tourism offering

In this report we are focusing on the importance of coastal and seaside locations to Scotland’s tourism offering. We begin by looking at statistics for GB Resident “domestic” day visitors before exploring the key characteristics of overnight visitors – firstly GB residents and then international inbound. We also include an overview of our accommodation provision and visitor attractions in coastal areas. Finally, we investigate the lure of Scotland's coasts through consumer research carried out before and during the COVID-19 pandemic and conclude with a focus on future opportunities.

The purpose of this Topic Paper is to use research findings to support everyone involved in delivering seaside and coastal tourism experiences in Scotland. We have used data from several sources to build a representative picture and as the domestic (UK) market accounts for roughly 80% of tourism in Scotland, we have explored the wealth of information available from the Great Britain Tourism Survey (GBTS) and the Great Britain Day Visits Survey (GBDVS). To provide additional international insight, we have also drawn on the International Passenger Survey (IPS), Scottish Accommodation Occupancy Survey (SAOS) and the VisitScotland Visitor Survey to explore the importance of Scotland’s coastal destinations from both an international and domestic visitor perspective.

The lure of Scotland’s coastal destinations was investigated via UK Brand and Communications Tracker research which measured the perceptions and behaviour of those resident in the UK who take regular domestic holidays and short breaks. Consumer sentiment towards coastal destinations has been tracked as part of the UK COVID-19 consumer sentiment tracker commissioned by the national tourist boards within Great Britain.

The following definitions were used in the development of this Topic Paper:

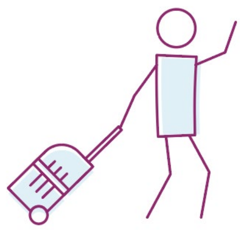
i) The term ‘seaside’ and ‘coastal’ are used interchangeably throughout.
ii) The GBTS, GBDVS and VisitScotland Visitor Survey methodologies ask respondents to define what they consider to be coastal regions.
iii) The SAOS defines coastal as “within approximately one mile of the coast”
iii) The Visitor Attraction Monitor uses the Scottish Government’s ‘Marine Regions’ definitions and more information on this can be found at
https://www2.gov.scot/Topics/marine/seamanagement/regional/Boundaries

A snapshot of Scotland’s coastal destination performance indicators

Our Coasts and Waters are host to an amazing array of riches, come in all shapes and sizes, and are greatly valued and cherished by communities and visitors alike. Coastal and seaside destinations are a vital part of Scotland’s tourism proposition, attracting visitors from within Scotland, from further afield in the UK, and from overseas.

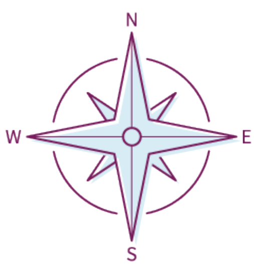
Coastal & Seaside tourism key facts and figures

1.8m
domestic overnight trips annually



38%
of international visitors visit a beach

16m
domestic day trips annually



29%
of domestic overnight trips taken in South of Scotland

£391m
domestic overnight spend annually

4 days
average domestic trip length

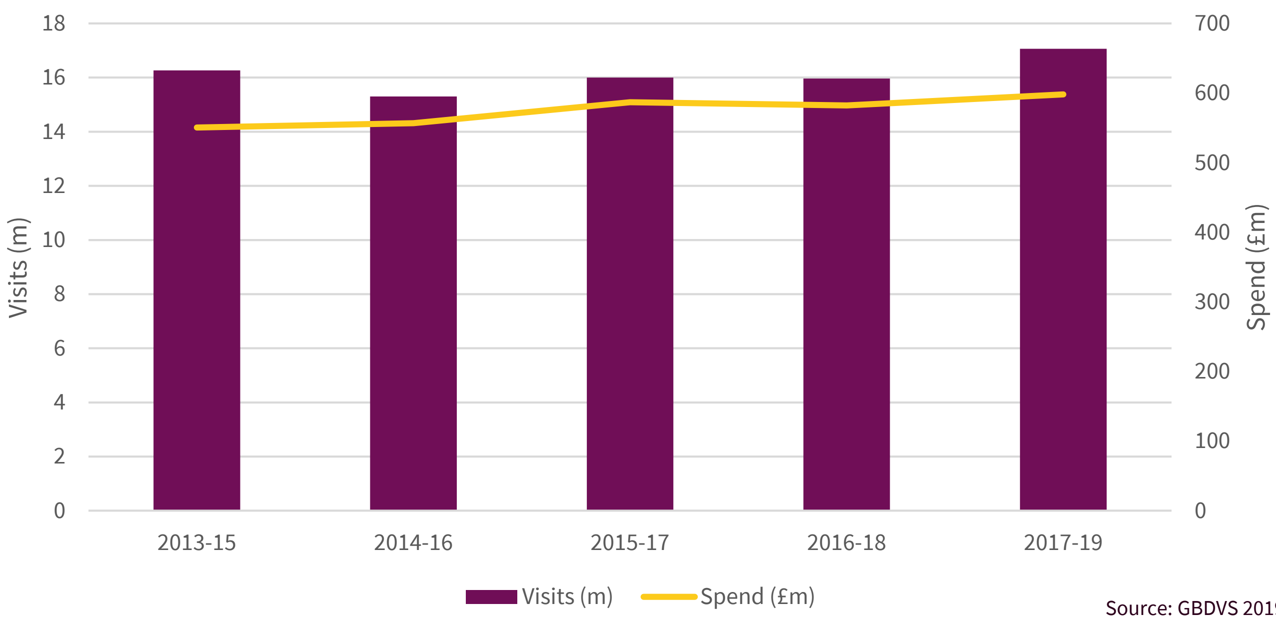
Source: GBTS 2015-19 and VisitScotland Visitor Survey 2016

Domestic Coastal Tourism

Day visitors to Scotland's coastal destinations

The number of domestic day visitors to Scotland's coastal destinations remained relatively stable over the last six years, prior to the COVID-19 pandemic, with around 16 million visitors annually accounting for 11% of all domestic day trips taken in Scotland in 2019.

Domestic day trips to coastal locations in Scotland



Source: GBDVS 2019

Popular activities for day trips to coastal locations in Scotland in 2019

Activity	% Trips
Undertook outdoor leisure activities such as walking, cycling, golf, etc.	34%
Went out for a meal	29%
Went on general days out/ to explore an area	30%
Visited friends or family for leisure	28%
Went to visitor attractions such as a historic house, garden, theme park, museum, zoo, etc.	13%

Source: GBDVS 2019

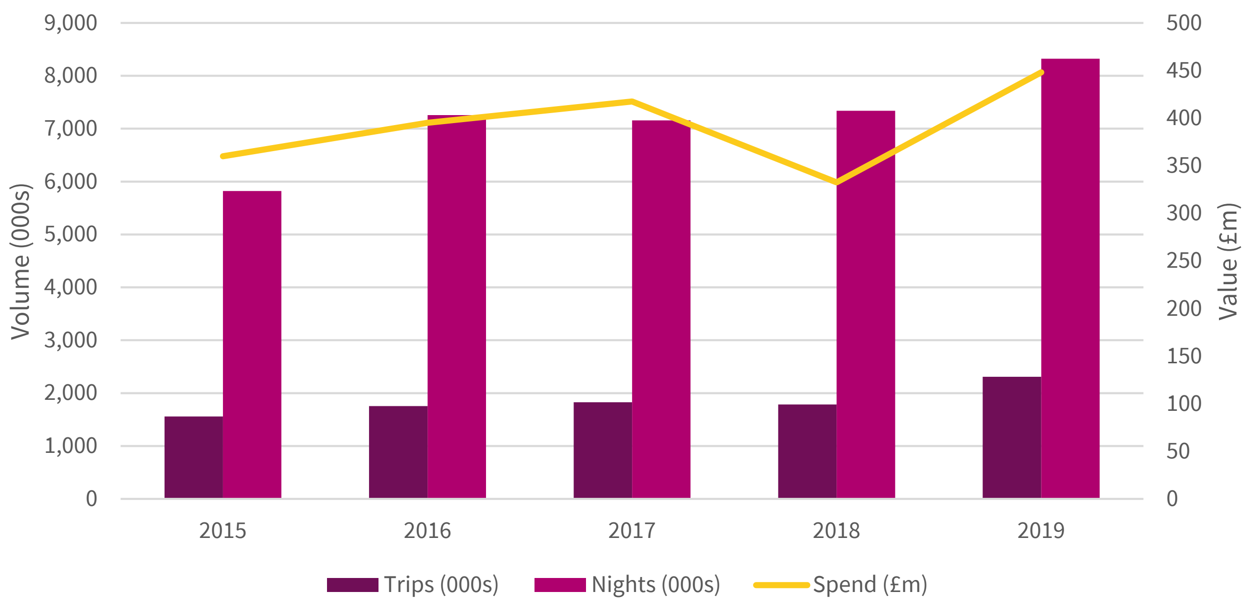
Leisure activities and exploring Scotland's landscape are popular activities for domestic day visitors. Outdoor leisure activities attract on average 5.8 million or 34% of visitors to the Scottish seaside every year.

Domestic Coastal Tourism

Volume and value of domestic overnight visitors in 2019

During the year 2019, domestic overnight trips to seaside and coastal locations in Scotland made a significant contribution to our tourism performance, generating 2.31 million overnight trips (greater than the 2015-19 average of 1.85) and realising an expenditure of £448m (compared to the average of £391m over 2015-19). Overnight trips to Scotland's seaside and coastal locations made up 16% of all overnight trips to Scotland and represented 14% of the total expenditure by domestic overnight visitor in 2019.

Domestic overnight trips to coastal locations in Scotland



Seaside	2019	2015-19 Annual Average	% Change 2015-19
Trips (000s)	2,309	1,894	48%
Nights (000s)	8,321	7,179	43%
Spend (£m)	448	391	24%
Spend/trip (£)	194	212	-16%
Spend/night (£)	54	54	-13%
Length of stay (days)	3.6	3.9	-4%

Source: GBTS 2019

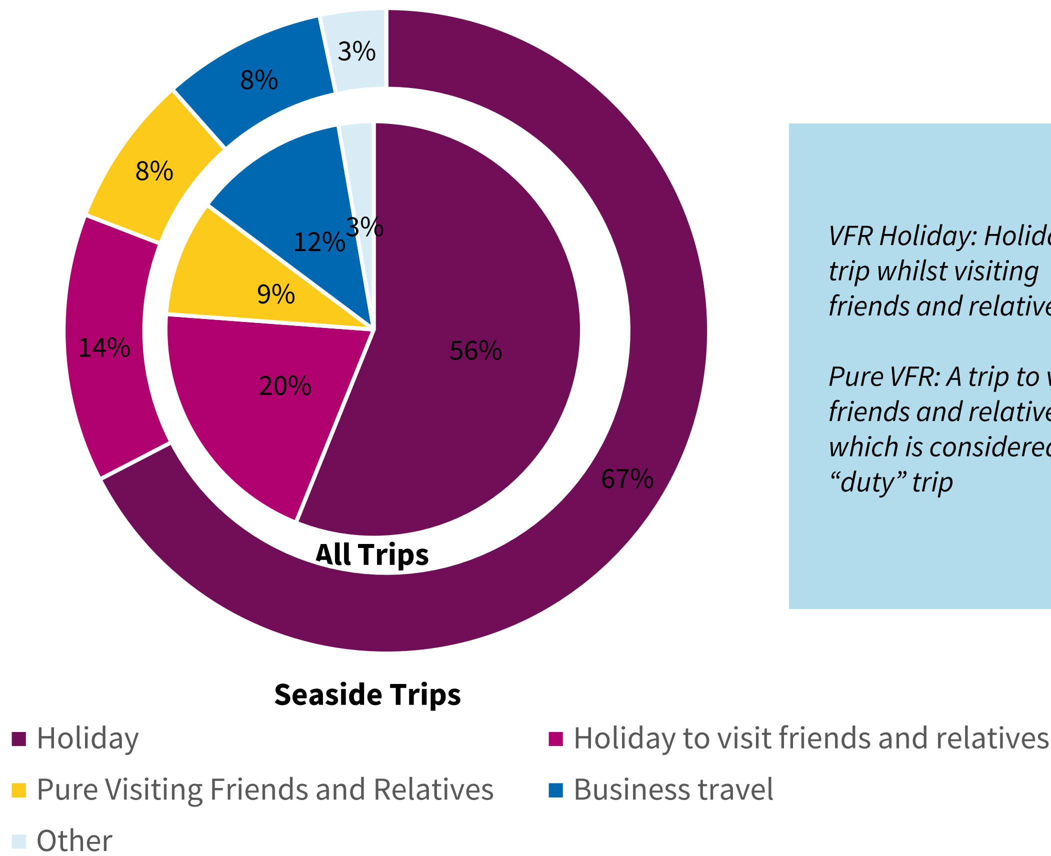
The number of domestic overnight trips to seaside and coastal locations in Scotland has consistently grown over the last four years, with 2019 achieving the highest visitor numbers seen in recent times at 2.3m. Despite an increase in volume of trips, the average spend per trip, spend per night and length of stay have all decreased since 2015, with the average spend/trip during a stay in seaside and coastal Scotland falling by 16%.

Domestic Coastal Tourism

Why do people visit Scotland's coastal locations?

Scotland has over 11,000 miles of coastline, 137 miles of canals, 31,460 freshwater lochs and several navigable rivers, alongside the 118 inhabited islands. Given the rural nature of Scotland's coastline and the types of businesses operating in these areas, it is perhaps not surprising that the majority of trips (67%) made to our seaside and coastal locations by GB residents taking overnight trips are purely for leisure purposes compared with 56% of trips to Scotland as a whole.

Purpose of trip: Scotland as a whole vs coastal Scotland



VFR Holiday: Holiday trip whilst visiting friends and relatives

Pure VFR: A trip to visit friends and relatives which is considered a "duty" trip

Source: GBTS 2019

Comparing holiday visits to Scotland as a whole against visits to Scotland's coasts reveals a lower spend per trip in our coastal locations by domestic visitors. It may be a reflection of the greater proportion of free activities undertaken during coastal trips and lower retail activity, seen more predominantly in urban centred trips. Businesses in Scotland's coastal destinations could encourage higher spend from visitors by further promoting local, authentic experiences that capture that imagination of holidaymakers.

Domestic Coastal Tourism

Which Scottish coastal regions do our domestic tourists visit?

Visitors to Scotland's coastal regions are more likely to visit the North or South of Scotland. The South of Scotland received almost three tenths (29%) of all our coastal visitors between 2017 and 2019, with the North following close behind at 28%. The North in particular saw their total visitor numbers increasing (+43%) during this period. Scotland's two main city destinations, Edinburgh and Glasgow, are in the East and West regions respectively and reflect visitors' preferences for city breaks to these regions. It should be noted many coastal destinations are accessible as part of a city break.

Volume of visitors by region visited

Region Visited	Average Volume of Trips (000s) 2017-19	Share of Trips
North	569	28%
South	606	29%
East	467	23%
West	424	20%

Source: GBTS 2019

Visitors to the north of Scotland spend the longest time here (almost five nights on average) which reflects time spent on travelling to get to their destinations. The average spend per trip is quite consistent at around £200, regardless of region visited, with slightly longer stays in the north resulting in a marginally lower spend per night. With the somewhat more accessible coastal regions of the east and west of Scotland achieving an average stay of around three days, there is opportunity to develop product offering and encourage visitors to extend their stay, to maximise expenditure in the area.

Trip characteristics by region visited (2017-19)

	North	South	East	West
Spend/trip	£210	£188	£179	£187
Spend/night	£46	£51	£64	£55
Length of Stay	4.5	3.7	2.8	3.4

Source: GBTS 2019

Domestic Coastal Tourism

Where do our domestic visitors come from?

Scots residents made over 1.3 million trips to our coastal destinations in 2019 and made up the majority of visitors to our coastal destinations in the period 2017 to 2019 (61%). Visitors travelling to our coastal locations from further afield, such as southern regions of England spent longer here and accounted for a higher total spend. It seems likely that these longer stays are driven by considerations of the travel times and distances involved in making a trip to Scotland. Interestingly, the longest stays were from more closely located residents of Yorkshire and the Humber, offering opportunities for increasing daily spend from this market.

Scotland's seaside and coastal locations remain a popular choice for visitors from North-West of England too, who took 215,000 coastal trips to Scotland during 2019 and spent a total of £41m. The highest spend per trip was made by visitors from London, who spent an average of £386 over a five-night stay.

Trip characteristics by region of residency (2017-19)

	Trips (000s)	Nights (000s)	Spend (£m)	Spend/trip (£)	Spend/night (£)	Length of stay (days)
Scotland	1,196	4,095	208	174	51	3.4
England	756	3,442	188	248	55	4.6
Wales	22	70	4	170	54	3.2

	Trips (000s)	Nights (000s)	Spend (£m)	Spend/trip (£)	Spend/night (£)	Length of stay (days)
North West England	215	845	41	190	48	3.9
Yorkshire and The Humber	121	777	33	277	43	6.4
South East England	80	317	18	224	56	4.0
North East England	74	240	13	170	52	3.3
East Midlands	68	307	21	311	68	4.5
London	65	312	25	386	81	4.8
West Midlands	56	307	14	248	45	5.5
East of England	48	232	16	338	70	4.9
South West England	31	105	7	221	66	3.4

Source: GBTS 2019

Domestic Coastal Tourism

What age of visitor do we appeal to most?

Trips to Scotland's seaside locations are most popular with those in the 55+ age group, who made a total of 971,000 trips in 2019 and spent £191m when they were here. The 35-54 age group represented the highest spend per trip age group, in line with the traditional family holiday nature of our coastal destinations. Interestingly, despite a lower overall volume, coastal trips accounted for a similar proportion of younger visitors (16-34) as seen across more traditionally engaged demographics, highlighting the broad appeal of Scotland coasts and waters.

Trip characteristics for coastal trips in 2019 by age group

	16-34	35-54	55+
Trips (000s)	602	737	971
Nights (000s)	1,889	2,717	3,715
Spend (£m)	105	152	191
Spend/trip	£175	£207	£196
Spend/night	£56	£56	£51
Length of Stay	3.1	3.7	3.8

Source: GBTS 2019

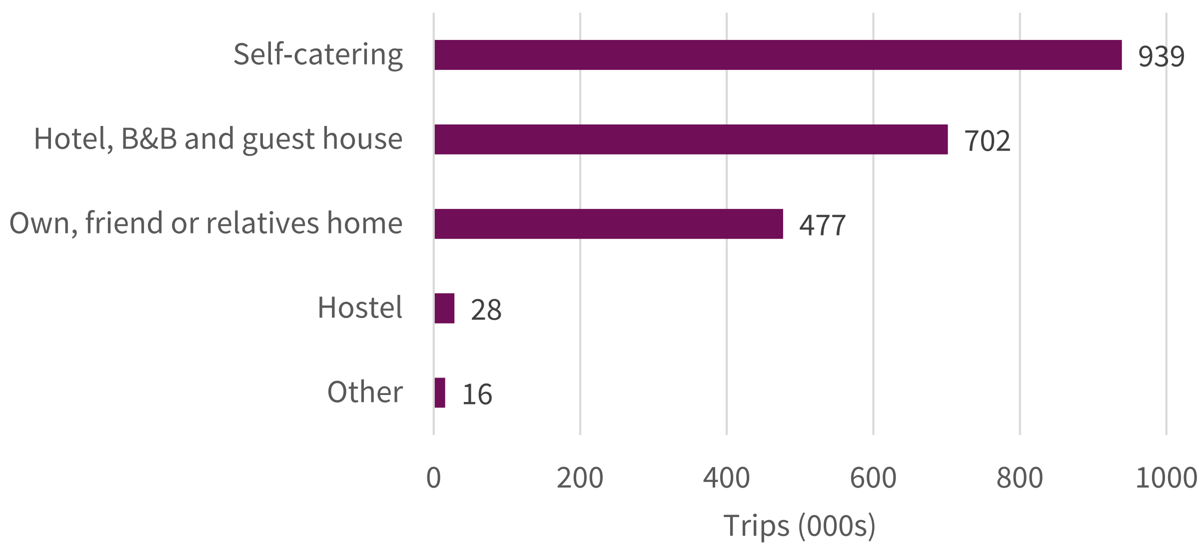
Isle of Staffa, Argyll & Bute

Domestic Coastal Tourism

What kind of accommodation is most popular at our coastal destinations?

Self-catering accommodation (including camping and caravanning) is the most popular choice for GB Resident overnight trips to Scottish coastal / seaside locations and accounted for 939,000 of the trips during 2019. Serviced accommodation in hotels, B&B's and guest-houses are the next most popular choice. For 21% of domestic overnight visitors, staying with friends or family is their preference.

Preferred accommodation for seaside trips



Source: GBTS 2019

Trip characteristics by accommodation type

	Spend/trip	Spend/night	Length of trip
Self-catering	£186	£41	4.5
Hotel, B&B and guest house	£193	£94	2.0
Own, friend or relatives home	£123	£38	3.3
Other	£32	£24	1.4

Source: GBTS 2019

Domestic Coastal Tourism

Which activities do our coastal visitors most enjoy?

Active pursuits including swimming, sailing and water sports as well as adventure sports are the most popular activities for our coastal visitors with just under half (49%) taking part. However, as shown by the range of activities in the table below, our seaside locations offer other opportunities including visiting local attractions and walking (as well as simply relaxing!) and tourist businesses are well-placed to engage with a variety of visitor preferences and interests from wellness to adventure tourism.

Popular activities during seaside trips

Activity category *(& examples of specific activity)*	**% Trips**
All Active pursuits	***49%***
Swimming (indoors or outdoors)	***9%***
Boating/sailing/water sports	***9%***
Adventure sports (e.g. skiing, snowboarding, rafting, canyoning)	***6%***
Visiting an attraction	***39%***
All Walking	***36%***
Short walk/stroll – up to 2 miles/1 hour	***19%***
Long walk, hike or ramble (minimum of 2 miles/1 hour)	***14%***
Relaxed	***28%***
Sightseeing	***26%***
Sightseeing on foot	***17%***
Sightseeing by car	***12%***

Source: GBTS 2018

Port Edgar, West Lothian

International Coastal Tourism

Attracting international tourists to our coastal locations

Scotland welcomed almost 3.5 million visitors from overseas in 2019, representing a 7% reduction in the overall volume of international inbound tourism to Scotland. Despite this slightly lower volume, the value of these visitors to Scotland's economy rose by 6.7% on the previous year. This growth in international visitor spend was driven by long stays by the long-haul markets of USA and China. A drop in volume of visits was seen across several European markets, driving the overall decrease in international tourism visits.

Top ten international markets for Scotland in 2019

Market	Visits (000s)	Nights (000s)	Spend (£m)
USA	636	4,246	717
Germany	322	2,228	196
France	222	1,723	135
Netherlands	182	1,210	95
China	172	2,047	142
Australia	148	1,706	146
Irish Republic	146	475	60
Spain	128	915	51
Canada	125	1,023	92
Italy	122	1,072	86

Source: IPS 2019

Investigating results from the VisitScotland Visitor Survey conducted in 2016, German and Italian respondents said they were more likely to have "visited a beach" as part of a break in Scotland, with one in four European visitors undertaking this activity.

Top ten international markets by propensity to visit a beach in Scotland

Market	Propensity to visit Seaside Scotland
Poland	62%
Germany	51%
Italy	51%
Switzerland	50%
South Africa	47%
Russia	45%
Canada	42%
Belgium	41%
Austria	40%
Denmark	37%
All markets	38%

Source: VisitScotland Visitor Survey 2016

Domestic and International Coastal Tourism

Exploring accommodation occupancy rates

Accommodation occupancy is used as a measure of demand for accommodation types, locations and quality. This is measured via the Scottish Accommodation Survey – a voluntary survey of accommodation businesses across Scotland. The results shown below are indicative of occupancy levels for those businesses choosing to contribute. Occupancy is measured at a business level and therefore does not differentiate between international and domestic visitors.

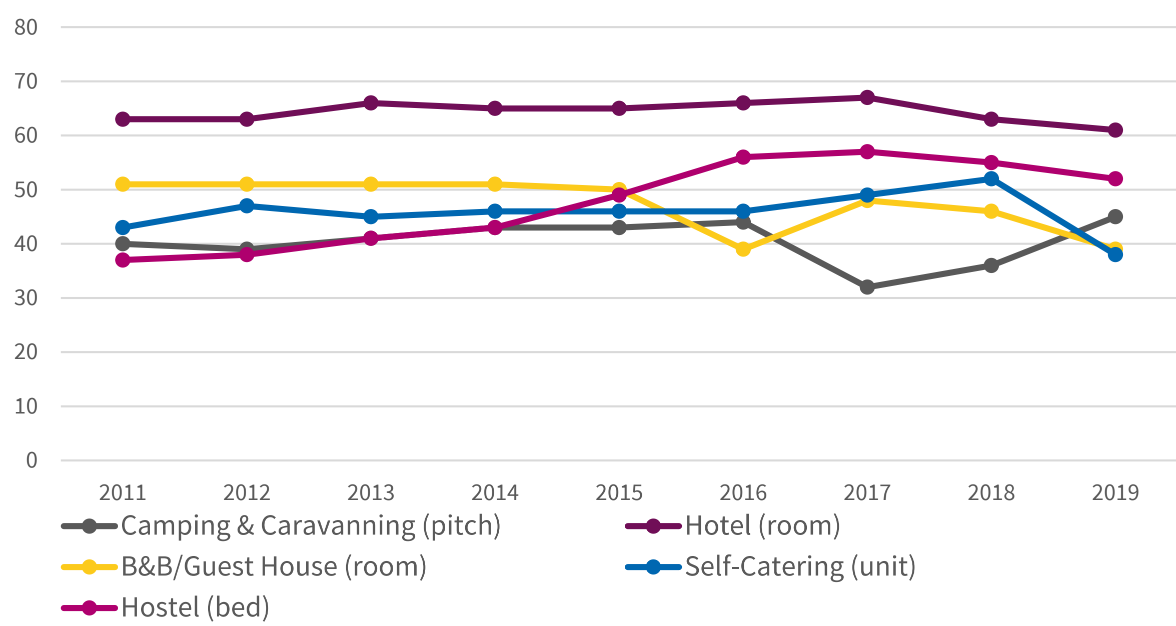
The total occupancy of hotels in Scotland's coastal areas is higher than other types of accommodation but still fell short of national hotel occupancy levels recorded during 2019 (66.5%). Touring accommodation is the only sector area that outperforms national occupancy levels in our coastal regions. Caravanning and camping experiences are closely linked with seaside and coastal holidays and outdoor activities.

Accommodation occupancy rates in Scotland's coastal destinations during 2019

	Hotel	Guesthouse & B&B	Self-catering	Touring	Hostel
Coastal Scotland	60.7%	39.4%	38.2%	44.7%	51.7%
All Scotland	66.5%	50%	47.6%	41.2%	60.1%

Source: SAOS 2019

Changes in accommodation occupancy rates in Scotland's coastal destinations between 2011 and 2019



Source: SAOS 2019

Domestic and International Coastal Tourism

Exploring marine region visitor attractions

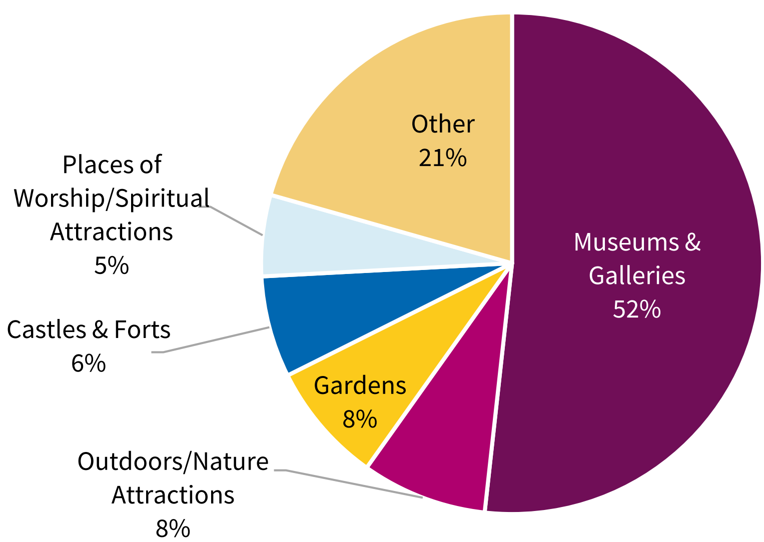
During 2019, almost 14.5m visits from domestic overnight, international inbound and day visitors were made to tourism attractions in Scotland's marine regions*. This represents a 10% increase in total attendance on 2018 figures, with the number of visits to free attractions increasing by 14.6%.

Visitor numbers to attractions in Scotland's marine regions in 2018-19

Admission Policy	Total Visits in 2018	Total Visits in 2019	Change
Free	9,137,896	10,469,764	14.6%
Paid	5,339,668	5,450,326	2.1%
Total	14,477,564	15,920,090	10.0%

Source: VAM 2019

Types of attractions visited in Scotland's marine regions in 2019



While visits to museums and galleries make up the majority (52%) of attraction visits in Scotland's marine regions, when investigating national performance across Scotland the top performing attraction category is 'outdoor and nature attractions' which made up 32% of all visits in 2019, coasts and inland waters will be a contributor to this.

*The definition 'marine regions' is used by the Scottish Government and the Moffat Centre - the source for the information in this section - but, for the purpose of context, 'marine' should be considered as equal to 'coastal' or 'seaside'.

The lure of Scotland's coast for UK holiday makers

Sample profile

To further understand attitudes and perceptions of Scotland's coastal destinations, analysis of responses gathered as part of the UK Brand and Communications Tracker was undertaken in 2019. The tracker measured the perceptions and behaviours of those resident in the UK who take regular domestic holidays and short breaks. Data was collected between April 2015 – March 2019 (Quadrangle/Kubi Kalloo Ltd on behalf of VisitScotland).

Active UK holiday makers are defined as those who had taken at least one overnight domestic trip in the past 12 months or planned to go for an overnight domestic trip in the next 12 months at the specific time they were surveyed. The data is weighted to be representative of the total UK population.

Sample profile: UK active domestic holiday makers

Region of residence	Proportion of sample
Scotland	9%
England	80%
North East England	4%
North West England	10%
Yorkshire/Humberside	7%
East Midlands	6%
West Midlands	8%
East of England	7%
Greater London	13%
South East England	14%
South West England	8%
Wales	7%
Northern Ireland	7%

Social Class (by chief household earner's occupation)	Proportion of sample
Non –working	19%
Working class	6%
Skilled working class	11%
Lower middle class	24%
Middle class	28%
Upper middle class	12%

£42,953

Average income of UK active holiday makers

The majority of survey respondents were resident in England (80%), in particular from the South East (14%), Greater London (13%), and North West (10%).

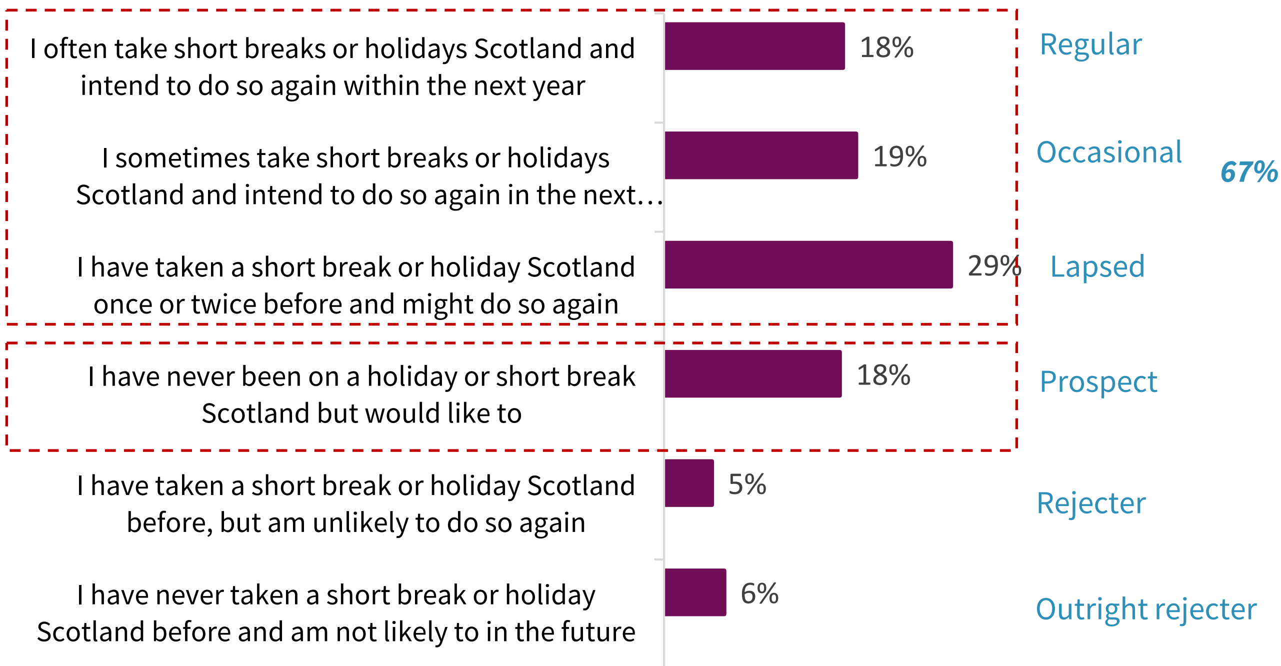
Within England, there is a significantly higher proportion of urban residents to rural residents (ONS). This is also the case in Scotland where 90% of the population live within some sort of urban settlement (NRS).

Those respondents who are UK active domestic travellers tend to be from more affluent social grades (40% middle/upper middle class); with a resulting higher average income than the UK population as a whole (£42,953 versus an average UK income of £29,400). (ONS)

The lure of Scotland's coast for UK holiday makers

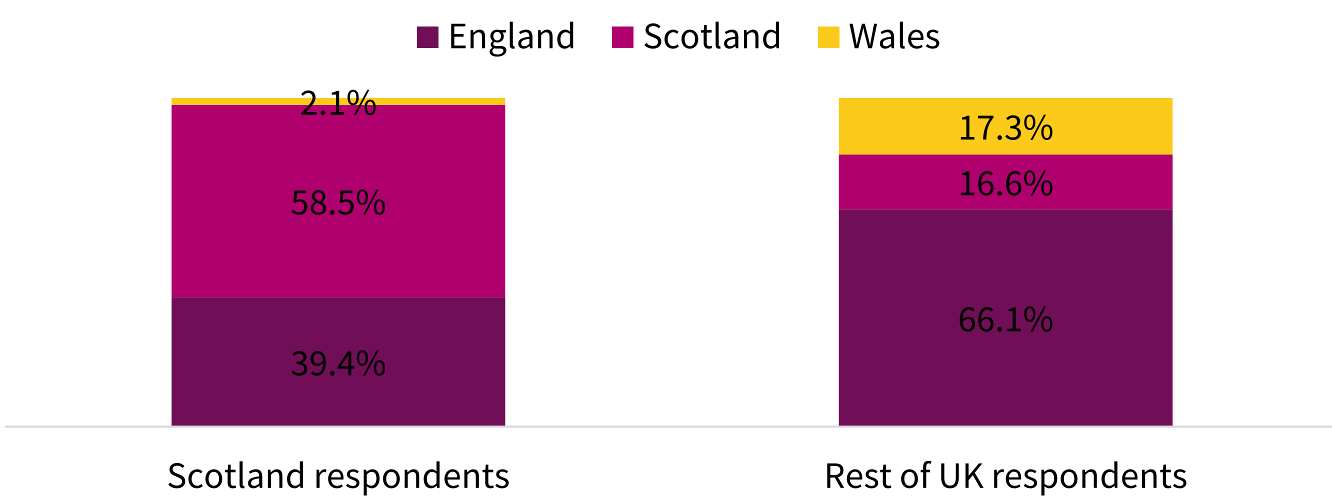
Sample profile continued

Visitation to Scotland



- 67% of respondents stated they had previously taken a holiday or short break in Scotland with almost 30% of those being lapsed.
- 18% are true prospects i.e. have never been to Scotland but would like to in the future.
- 11% are rejectors of future holidays and short breaks in Scotland

Destination country of domestic holiday in the past 12 months



- 58.5% of respondents resident in Scotland chose to spend their most recent domestic holiday within Scotland rather than visit other parts of UK;

- 16.6% of holiday makers from other parts of the UK visited Scotland for their most recent break

The lure of Scotland's coast for UK holiday makers

Exploring the appeal of coastal destinations for UK domestic visitors

With over half of domestic consumers "extremely interested" or "very interested" in taking a coastal break within the UK in the next two years, it looks to be plain sailing for coastal tourism destinations moving forward.

When presented with images depicting different types of holiday breaks, respondents ranked coastal images highest when considering what type of break they are likely to take in "next year or two". Coastal imagery ranked above those showing historic, rural and food and beverage themed breaks, traditional areas of strength for Scotland. The challenge for tourism businesses in Scotland is how to convert this interest into engagement and booking.

Types of domestic holidays and their appeal to domestic markets

	Scotland	England	RoUK
1st	Coastal (53%)	Coastal (60%)	Coastal (59%)
2nd	Historic (52%)	Rural (57%)	Historic (54%)
3rd	Rural (48%)	Historic (51%)	Rural (52%)
4th	Food & Beverage (44%)	Food & Beverage (49%)	Food & Beverage (46%)
5th	Relax (41%)	Relax (49%)	Nature (44%)
6th	Nature (38%)	Nature (48%)	Relax (43%)
7th	Friends (34%)	Seaside (45%)	Seaside (37%)
8th	Arts (33%)	Friends (37%)	Shopping (34%)
9th	Shopping (32%)	Shopping (37%)	Arts (33%)
10th	Seaside (31%)	Festivals (36%)	Friends (32%)

Source: VisitScotland, The lure of Scotland's coast for UK holiday makers, 2019

Coastal destinations were ranked most attractive by respondents from all regions of the UK and particularly strongly by English residents with 60% responding with a "Top 2 Box" ranking.

Interestingly, there was disparity between results for **seaside** scenery and **coastal**, with seaside proving less popular, especially for Scotland residents (ranked 10th).

The lure of Scotland's coast for UK holiday makers

Exploring the appeal of UK consumers to visit coastal destinations

All GB countries were associated with images of coastal scenery with two-thirds of respondents perceiving Scotland as coastal. This is marginally lower than the result for England (68%), which was also very closely associated with "seaside" (84%). Themes such as nature, sports and friends were more closely associated with Scotland as a destination.

Destination perceptions of GB countries by UK holidaymakers

Holiday themes	Scotland	England	Wales
Nature	76%	57%	65%
Sports	74%	67%	60%
Friends	70%	78%	68%
Coastal	66%	68%	65%
Food & Beverage	65%	78%	61%
Historic	65%	64%	59%
Relax	63%	77%	63%
Family	62%	78%	66%
Adventure sports	58%	53%	66%
Shopping	58%	84%	54%
Rural	54%	70%	66%
Arts	53%	71%	43%
Festivals	44%	81%	44%
Seaside	31%	84%	45%

Source: VisitScotland, The lure of Scotland's coast for UK holiday makers, 2019

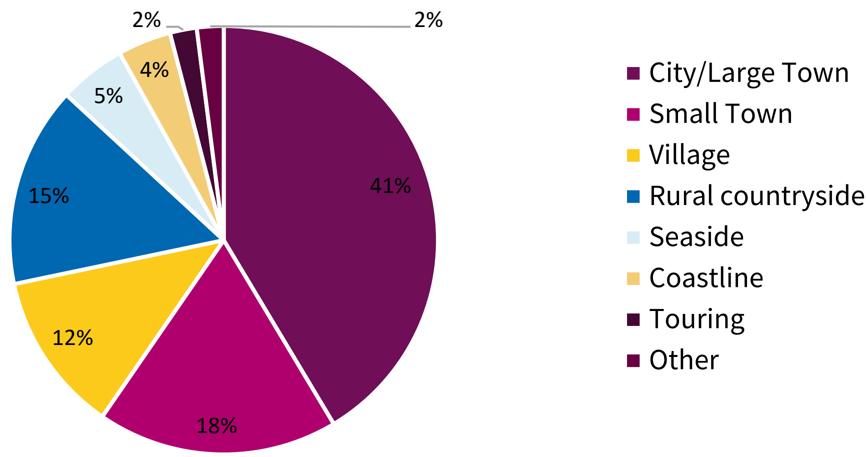
Galloway Activity Centre, Dumfries & Galloway

The lure of Scotland's coast for UK holiday makers

Exploring the propensity of UK consumers to visit coastal destinations

Despite their levels of interest in coastal regions as a destination for a short break, the vast majority of respondents had not taken such a break in Scotland within the previous 12 months, opting instead for visits to our towns and cities. It's clear that while Scotland's coast is a highly motivating factor for consumers considering a trip, it's not translating into actual engagement at levels reflected in their enthusiasm for the experience coastal Scotland offers.

Competitor destination types in Scotland visited by share of response within UK market



Source: VisitScotland, The lure of Scotland's coast for UK holiday makers, 2019

Work needs to continue to capitalise on interest in Scotland's coastal opportunities into actual trips and allow tourism providers to benefit from a growing visitor economy. Activities relating to the Year of Coasts and Waters were designed to encourage visitors to consider how they can maximise their interaction with our coastal regions and result in a higher uptake of this kind of trip.

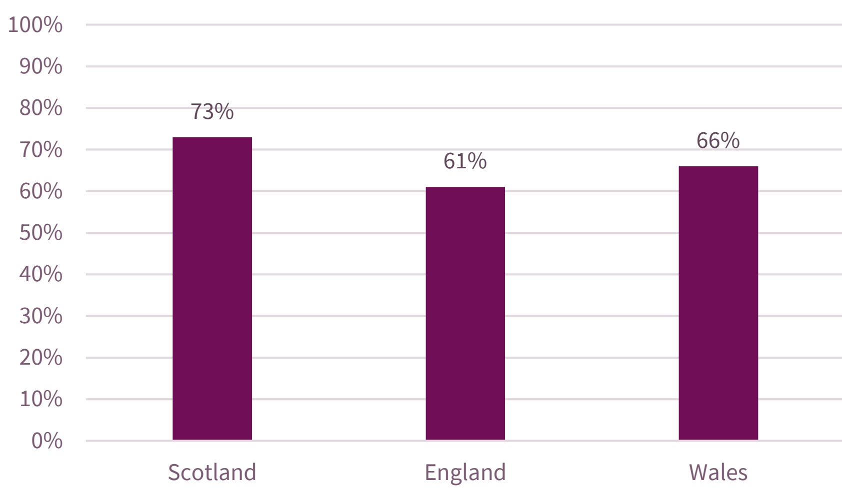
Encouragingly, throughout the COVID-19 pandemic, interest in coastal destinations has been high. When asked to consider destination types for a UK break in Spring (April – June) and Summer (July – September) 2021, 28% of those intending to take a break favoured a "rural coastline" trip in Spring and 29% in Summer. Scottish residents considering Spring and Summer trips to Scotland are more likely to stay in a 'traditional coastal town' across both time periods, and in 'rural coastline' in the summer (Impact of COVID-19 on our UK and Ireland Markets - Research | VisitScotland.org).

The lure of Scotland's coast for UK holiday makers

UK consumers as advocates of visits to coastal destinations

Domestic visitors who have already taken a short break in a Scottish coastal destination show higher levels of advocacy in terms of their willingness to recommend this type of trip, compared to those travelling to coastal destinations in England and Wales.

Visitors likelihood to recommend coastal trips to Scotland

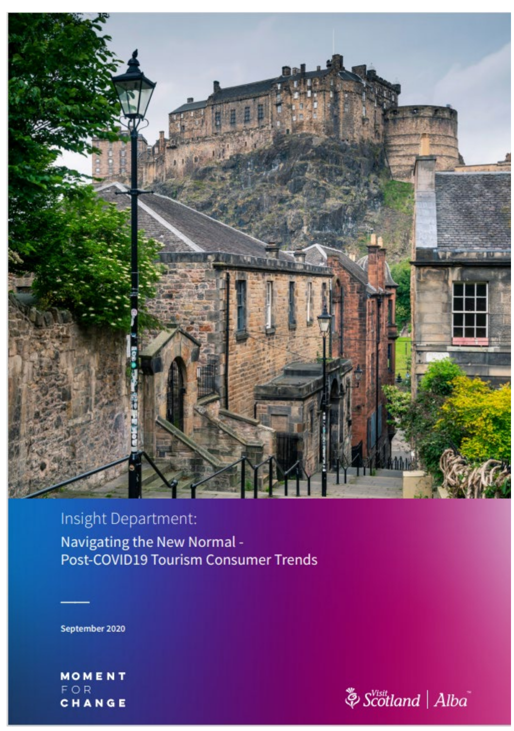


Source: VisitScotland, The lure of Scotland's coast for UK holiday makers, 2019

With word-of-mouth recommendations and user generated content playing an increasingly important role in planning and booking decisions. Driven by a need for transparency and trust between holidaymakers and businesses, this high level of advocacy for coastal destinations should encourage repeat visitation and reassurance to those planning a trip.

For insight on the post-COVID consumer please see our recent publication:

Insights - navigating the new normal (visitscotland.org



On the horizon

Assessing the opportunities and challenges ahead for our coastal destinations

Scotland's coastal and seaside destinations continue to draw both domestic and international visitors. Tourism businesses will be aware of opportunities for potential expansion and ongoing threats to sustainable growth of this valued aspect of our tourism economy particularly during a period of recovery following the COVID-19 pandemic.

A SWOT analysis of coastal tourism in Scotland

Strengths

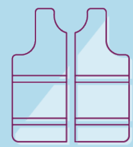
High proportion of domestic holiday makers key to short-term recovery

Good accessibility for day visits

Longer average length of trip, particularly further north

High propensity to visit our beaches by key European markets

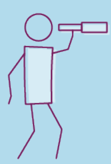
Weaknesses



Wide range of competing choices – coastal destinations account for 16% of domestic trips in Scotland

Decreasing total expenditure and competitive market

High volume and low spend driven by family groups (aged 35-54)



Opportunities

3 out of 5 domestic consumers interested in a coastal break within the next 2 years

Capacity for more visitors within popular accommodation types

High advocacy from visitors who have holidayed in coastal Scotland

Threats

Interest from UK consumers not translating into bookings for coastal breaks

Increasing volume of visitors with lower spend

The Bay of Skaill, Orkney

Appendix 1
Sources and their interpretation

The following sources were used in the development of this Topic Paper:

VisitScotland, The lure of Scotland's coast for UK holiday makers, 2019
Great Britain Day Visitor Survey 2019
Great Britain Tourism Survey 2019
International Passenger Survey 2019
Scottish Accommodation Occupancy Survey 2019
Moffat Centre Visitor Attraction Monitor 2019
VisitScotland Visitor Survey 2016
VisitScotland Navigating the New Normal - Post-COVID19 Tourism Consumer Trends, 2020
VisitScotland COVID-19 UK Consumer Tracking Report, 2021

Analysis of sub-groups – such as trips by purpose or demographic group – relies on small sample sizes that can be unreliable. Where this is a particular issue, methods to aggregate date, such as using a multi-year average instead of single-year data, have been employed. Before using the data, it is important to recognise the limitations of using a small sample size.

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