








**INSIGHTS DEPARTMENT**  
Topic Paper August 2016

# Coastal Tourism in Scotland



## Coastal Tourism in Scotland – Background

The following paper is a summary of the tourism performance of Scotland’s seaside and coastal locations. Using data from a number of sources (see appendix), insight has been drawn to gain a representative picture of the importance of seaside and coastal locations to the Scottish tourism industry.

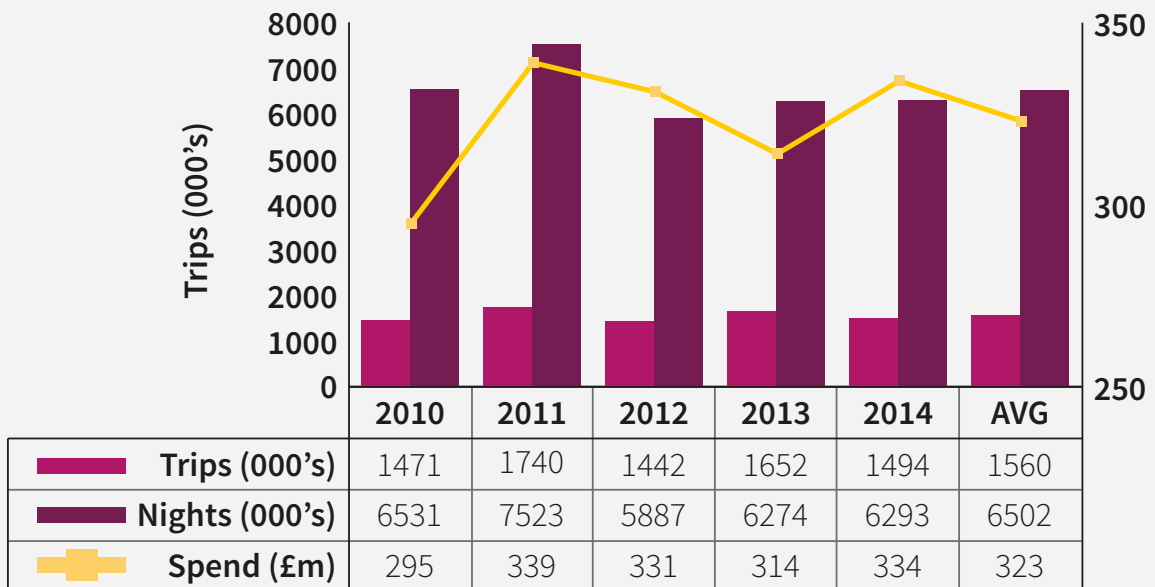
<p><b>£323m</b></p>	<p><b>Domestic visits</b> to seaside locations in Scotland generate an average of 1.5 million trips, 6.5 million nights, and £323 million per annum.</p>
	<p><b>Holiday trips</b> are by far the most popular purpose of trip to seaside locations by the <b>domestic market</b>, generating an average of 1 million trips, 4.7 million nights, and £236 million in expenditure.</p>
<p><b>W</b> </p>	<p>The west of Scotland generates the largest amount of volume and value of domestic trips of all the regions of Scotland, with an average of 612,000 trips, 2.2 million nights, and £112 million in expenditure per annum.</p>
	<p>Self-catering properties are the most popular form of accommodation utilised by domestic consumers visiting seaside locations in Scotland, generating an average of 582,000 trips per annum.</p>
	<p>The car is by some distance the most popular mode of transport for domestic consumers to visit seaside locations, generating an average of around 1.2 million trips per year, 5.1 million nights, and £240 million in expenditure.</p>
	<p><b>Visitors from Northwest/Merseyside</b> take an average of 108,000 trips each year to coastal locations in Scotland. They also stay for the longest period on average, generating 5.7 nights per trip. <b>They are the largest market within England that travel to Scotland and utilise seaside locations.</b></p>
<p><b>35-44</b></p>	<p>Figures indicate the domestic coastal tourism market is mostly utilised by the <b>35-44 year old demographic group</b>, who generate an average of 378,000 trips, 1.6 million nights, and £76 million in spend per annum.</p>
	<p>Generally, domestic day trips to seaside resorts or towns are for leisure pursuits such as going out for a meal, visiting friends or family for leisure, or undertaking outdoor leisure activities such as walking.</p>
	<p>Sandwood Bay of Sutherland averages the most monthly organic searches with Scottish consumers researching Scottish beaches.</p>
<p><b>26%</b></p>	<p>26% of overseas respondents visit a beach while on their holiday in Scotland.</p>

## Market Overview

### Did you know...

Domestic overnight visits to seaside locations in Scotland generate an average of 1.5 million trips, 6.5 million nights, and £323 million per annum.

All Domestic Overnight Trips to Seaside Locations



Source: GBTS

There has been a steady increase in domestic tourism volume and value for seaside locations in Scotland since 2010, which has seen consumers generating greater levels on their trip and daily spend. From calculating the average volume and value between 2010 and 2014 against the figures from 2010, percentage growth figures for the period can be calculated. Figures indicate that domestic trips to seaside locations have increased by 6%, while expenditure has increased 9%. The increase in popularity could be attributed to the lag effect from the 'staycation' period, which allowed domestic consumers to recognise the amenities available in their own country.

Average spend by visitors to Seaside	2010	2011	2012	2013	2014	Average
Per Trip	£201	£195	£230	£190	£224	£208
Per Night	£45	£45	£56	£50	£53	£50
Length of Stay	4.4	4.3	4.1	3.8	4.2	4.2

Source: GBTS

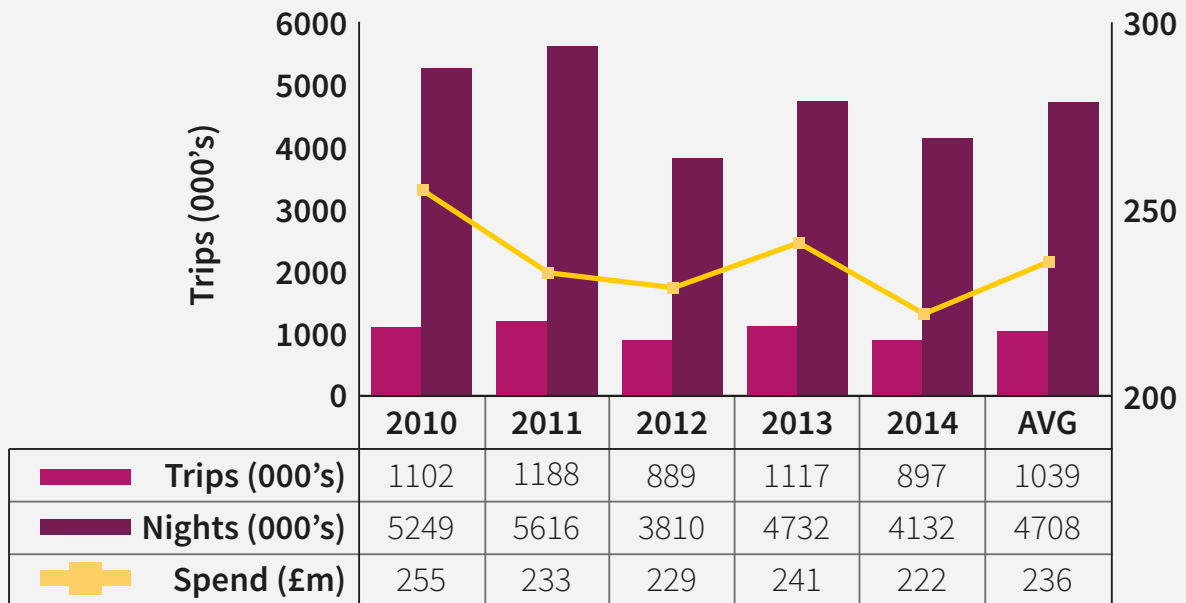
Figures also indicate there has been a steady increase in average spend per trip and night with domestic consumers increasing their spend per trip by 4% to generate £208, while spend per night has increased 11%.

## Holiday Trips

### Did you know...

Holiday trips are by far the most popular purpose of trip to seaside locations by the domestic market, generating an average of 1 million trips, 4.7 million nights, and £236 million in expenditure.

**Holiday Domestic Trips to Seaside Locations**



Source: GBTS

Figures indicate volume and value have both seen a decrease over recent years, which could be attributed to the easing of the economic situation, allowing for more access for foreign travel, as well as poorer weather conditions, making trips to the beach or seaside less attractive. This also indicates that VFR travel has driven the increase in all trips to seaside locations over recent years.

Despite a decrease in the volume and value of holiday trips to seaside locations in Scotland by domestic consumers, there has been an increase in consumer trip spending between 2010-2014. The average spend per trip and night has increased by 19% and 12% respectively over this period. There has also been a 6% increase in length of stay at seaside locations. This could indicate that although there are a number of factors which may deter domestic consumers to seaside locations for holiday purposes, there is a core market that is attracted to the Scottish seaside.

Average spend by visitors to Seaside	2010	2011	2012	2013	2014	Average
Per Trip	£174	£197	£243	£188	£231	£207
Per Night	£41	£42	£57	£43	£49	£46
Length of Stay	4.2	4.7	4.3	4.3	4.8	4.5

Source: GBTS

## Region Visited

The west of Scotland generates the largest number of trips of all the regions of Scotland, with an average of 612,000 trips per annum. The west also generates the largest average of nights and expenditure than any other region with 2.2 million nights and £112 million in expenditure respectively. Interestingly the north of Scotland, which generates the second highest level of figures in regards to volume and value, also generates the highest average level of spend per trip and night, as well as generating the longest length of stay than any other region in Scotland. This increase in spend for the north of Scotland could be attributed to the longer journey times within the northern region. It should also be noted that the size of the western market could be attributed to nostalgic trips taken by older consumers revisiting popular holiday destinations, which were traditionally found on the west coast of Scotland.

Trips to Seaside - Region Visited (000's)	2010	2011	2012	2013	2014	Average
North	318	418	384	542	473	427
West	634	794	604	588	438	612
East	434	399	348	403	253	367
South	129	194	163	167	451	221

Source: GBTS

Nights to Seaside - Region Visited (000's)	2010	2011	2012	2013	2014	Average
North	1799	1751	1472	2392	2019	1887
West	2233	3297	2153	2182	1623	2298
East	1768	1385	1325	1118	847	1289
South	580	763	770	490	1803	881

Source: GBTS

Spend to Seaside - Region Visited (£m)	2010	2011	2012	2013	2014	Average
North	93	98	83	123	121	104
West	102	147	115	114	83	112
East	73	47	84	37	51	58
South	20	27	42	28	80	39

Source: GBTS

Average spend by region	North	West	East	South
Per Trip	244	183	158	176
Per Night	55	49	50	44
Length of stay	4.4	3.7	3.5	3.9

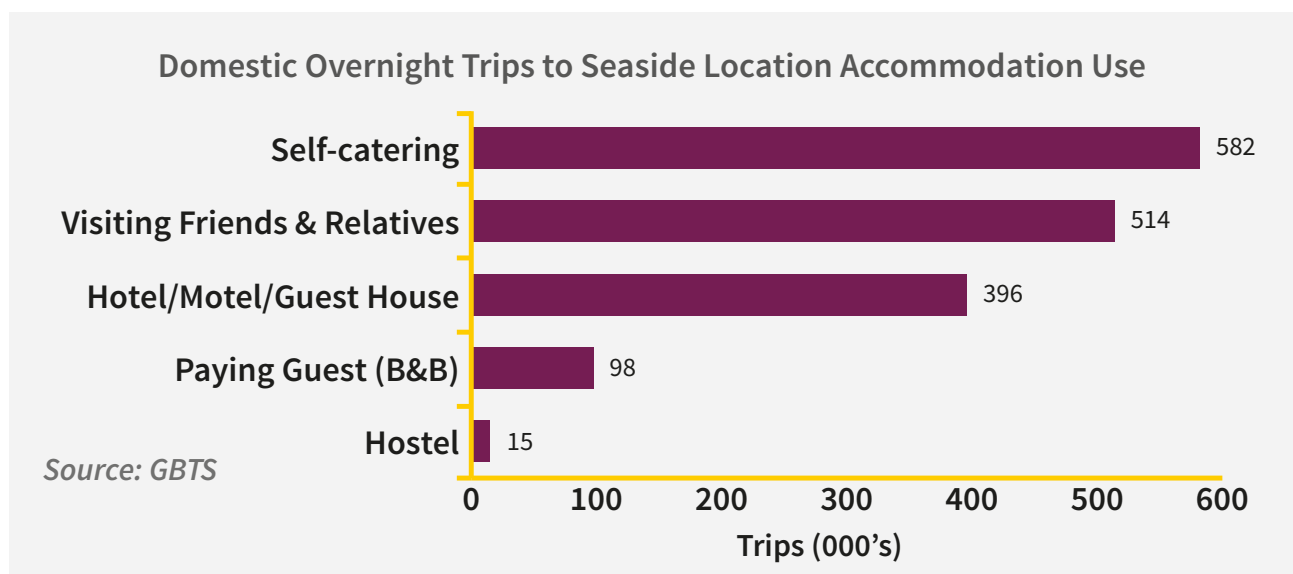
Source: GBTS

## Accommodation

**Self-catering properties are the most popular form of accommodation utilised by domestic consumers visiting seaside locations in Scotland**, generating an average of 582,000 trips per annum. Self-catering also produced the largest numbers for both nights and expenditure with 3.1 million nights, and £135 million in spend respectively.

**The domestic market also utilised friends and relatives when visiting seaside locations**, with an average of 514,000 trips made per annum in conjunction with this accommodation type. Guests utilising friends and relatives' properties as a means of accommodation also spend the second largest number of nights, generating an average of 1.9 million nights, as well as £69 million in expenditure.

Hotel/Motel/Guest House generated the third highest trip average over the same period, with 396,000 trips per annum. Hotel/Motel/Guest House also generated the third highest level of nights with 927,000, but they also produced the second highest level of expenditure of all accommodation sectors with £90 million per annum.



In terms of average spend, self-catering, which generates on average the largest volume and value of trips by accommodation sector actually generates the least per trip and night. Hotel/motel/guest house guests spend the most per trip with £232, and stay for the longest length of time with an average of 5.4 nights. Interestingly, hostel and paying guest consumers spend the most on a single visit with an average spend of £97 respectively.

Average Accommodation used on Trip	Per Trip (£)	Per Night (£)	Length of Stay
Hostel	£226	£97	2.3
Paying Guest (B&B)	£229	£97	2.4
Hotel/Motel/Guest House	£232	£43	5.4
Visiting Friends & Relatives	£143	£64	2.2
Self-catering	£118	£32	3.7

Source: GBTS

## Transport Used

The car is by some distance the most popular mode of transport for domestic consumers to visit seaside locations, generating an average of around 1.2 million trips per year, 5.1 million nights, and £240 million in expenditure. Many other forms generate similar numbers in terms of volume, but train generates the second highest in terms of volume and value over the five year period, with 145,000 trips, 567,000 nights, and £32 million in expenditure.

Average Transport used on Trip (2010-2014)	Trip (000's)	Night (000's)	Spend (£m)
Train	145	567	£32
Regular Bus/Coach	57	188	£7
Plane	45	144	£17
Boat/Ship/Ferry	45	134	£8
Car	1172	5142	£240
Motorised Caravan/Campervan	34	127	£4
Motorcycle	2	9	***
Organised Coach Tour	32	109	£7

\*\*\* Denotes spend is lower than £1m Source: GBTS

Average spend per trip by transport use is mostly dictated by the costs associated with the transport type, which can be attributed to the high levels of spend for planes and trains. The car generated the longest length of stay for domestic consumers, with an average of 4.4 days. This could be attributed to the short break market and the level of freedom the consumer has with their decision making process. A trip to the seaside may have been part of a trip, but not the main reason for travel.

Transport used on Trip (Average spend)	Per Trip	Per Night	Length of Stay
Train	£221	£56	3.9
Regular Bus/Coach	£129	£39	3.3
Plane	£385	£121	3.2
Boat/Ship/Ferry	£176	£60	2.9
Car	£205	£47	4.4
Motorised Caravan/Campervan	£131	£35	3.8
Motorcycle	£182	£44	4.1
Organised Coach Tour	£226	£66	3.4

Source: GBTS

## Region of Residence

Visitors from Scotland take the most trips to coastal locations within Scotland, averaging around 966,000 trips, staying for 3.7 million nights, and spending £163 million per annum. An average of 533,000 trips were taken each year to Scotland by visitors from England, who generate around 2.6 million nights, and £150 million in expenditure. Coastal locations are most popular with visitors from the Northwest/Merseyside, who take an average of 108,000 trips each year to coastal locations in Scotland. They also stay for the longest period on average, generating 5.7 nights per trip.

Region of Residence - Average (2010-2014)	Trips (000's)	Nights (000's)	Spend (£m)	Spend per Trip	Spend per Night	Length of Stay
Scotland	966	3749	£163	£168	£43	3.9
Wales	25	103	£10	£403	£97	4.2
England	533	2650	£150	£281	£57	5.0
North East	78	335	£15	£194	£45	4.3
NW/Mersey	108	614	£29	£265	£47	5.7
Yorks/H'side	83	458	£20	£236	£43	5.5
East Midlands	65	296	£16	£245	£54	4.5
West Midlands	47	197	£8	£171	£41	4.2
East of England	39	203	£10	£269	£51	5.3
London	33	163	£9	£282	£57	5.0
South East	45	241	£13	£295	£55	5.4
South West	35	143	£10	£282	£70	4.0

Source: GBTS





## Demographics

Figures indicate the domestic coastal tourism market is **mostly utilised by the 35-44 year old demographic group**, who generate an average of 378,000 trips, 1.6 million nights, and £76 million in spend per annum. In terms of volume and value, the mature demographics also utilise beach locations in Scotland, which have also seen growth in terms of trips over the last five years. Interestingly, there has also been an increase of interest in terms of trips by the 25-34 year old demographics between 2010 and 2014.

Average Trips by Demographic (2010-2014)	16-24	25-34	35-44	45-54	55-64	65+
Trips (000's)	107	229	378	312	299	234
Nights (000's)	365	831	1690	1293	1193	1130
Spend (£m)	19	46	76	64	64	53
Average spend per trip (£)	179	202	201	205	215	227
Average spend per night (£)	53	56	45	50	54	47
Average length of stay (nights)	3.4	3.6	4.5	4.1	4.0	4.8

Source: GBTS



## Day Visits – Seaside, Coastline & Beach Trips

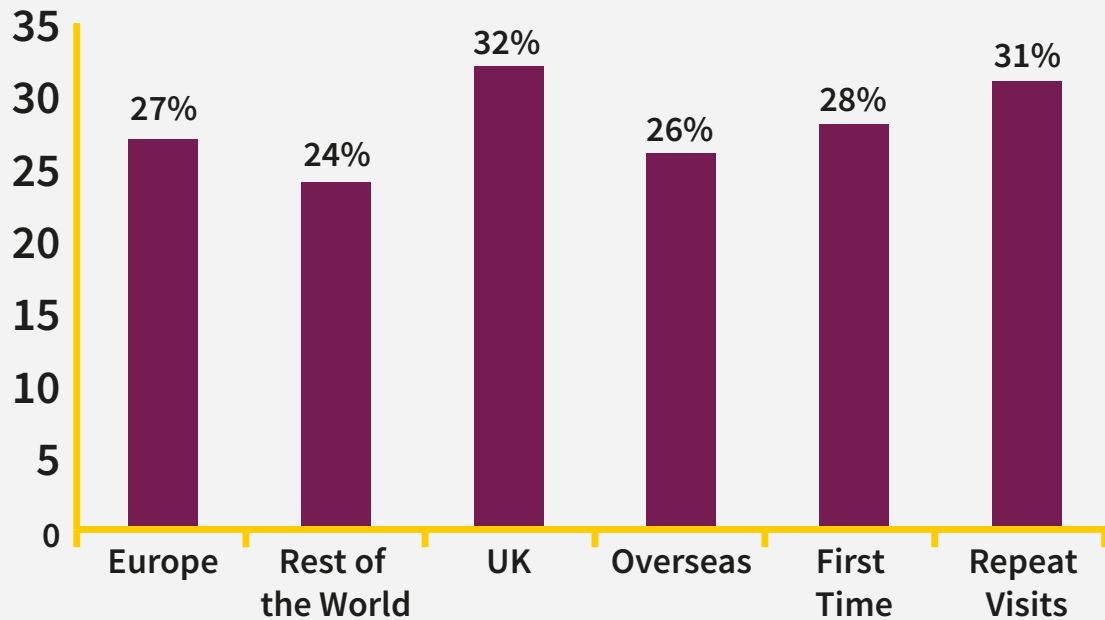
In terms of domestic day visits to Scottish seaside, coastline, and beach trips, the majority of activities revolve around general days out, outdoor leisure activities, visiting friends or relatives for leisure, or food & drink. It is evident that seaside locations generate much interest due to the perceived cost involved as part of a day trip. Many of the activities associated with seaside locations may have a low cost, which may influence consumers to visit these locations more frequently. It is also interesting that the food & drink industry is recognised as such an integral part of the day visit activity within seaside locations in Scotland. The perception of quality associated with food & drink in Scotland, particularly in that of the seafood industry, may be a driver in influencing consumers to visit seaside locations around Scotland's coastal areas.

Day Visits to Seaside Coastline & Beach (4 year average - 2011-2014)	Trips (m)	Spend (£m)
Going on general days out/ to explore an area	2.3	84
Undertaking outdoor leisure activities such as walking, cycling, golf, etc.	2.0	54
Visiting friends or family for leisure	1.2	23
Going out for a meal	1.0	56
Going on day trips/excursions for other leisure purpose not mentioned above	1.0	36
Going on a night out to a bar, pub and/or club	0.6	121
Taking part in other leisure activities such as hobbies, evening classes, etc. (outside of your home)	0.4	12
Watching live sporting events (not on TV)	0.4	9
Going to visitor attractions such as a historic house, garden, theme park, museum, zoo, etc.	0.3	15
Going to special public event such as a festival, exhibition, etc.	0.3	10
Taking part in sports, including events or competitions	0.2	5
Going on days out to a beauty/health centre/spa, etc.	0.2	39
'Special' shopping for items that you do not regularly buy	0.2	6
Going to special events of a personal nature such as a wedding, graduation, christening, etc.	0.1	7
Going out for entertainment - to a cinema, concert or theatre	0.1	29

Source: GBDVS

## International Consumers

Data gathered from VisitScotland's Scotland's Visitor Survey 2011-2012 indicates that 26% of overseas respondents visited a beach while on their holiday. In terms of overseas markets, visitors from Europe have the highest propensity to visit a beach while on holiday in Scotland.



Source: VisitScotland's Scotland Visitor Survey 2011-2012



## Consumer Analytical Data

Data has been gathered by our VisitScotland to better understand what consumers search for on visitscotland.com when researching coastal tourism products in Scotland. Sandwood Bay in Sutherland averages the most monthly organic searches with Scottish consumers researching Scottish beaches. This may be due to its isolated and secluded location, which may attract consumers seeking more tranquil and personal experiences within Scotland. Other organic searches are based around more general terms associated with beaches and quality within Scotland.

Top Ten Keyword Searches within Scotland (ORGANIC SEARCH)	Avg. Monthly Searches (exact match only)
Sandwood Bay	880
Beaches in Scotland	390
Scottish beaches	210
Coastal cottages Scotland	70
Best Scottish beaches	70
Beach cottages Scotland	50
Beach cottage Scotland	40
Seaside cottages Scotland	40
Sandwood Bay Sutherland	30
Scottish beach	30

Source: Google Trends and Adwords

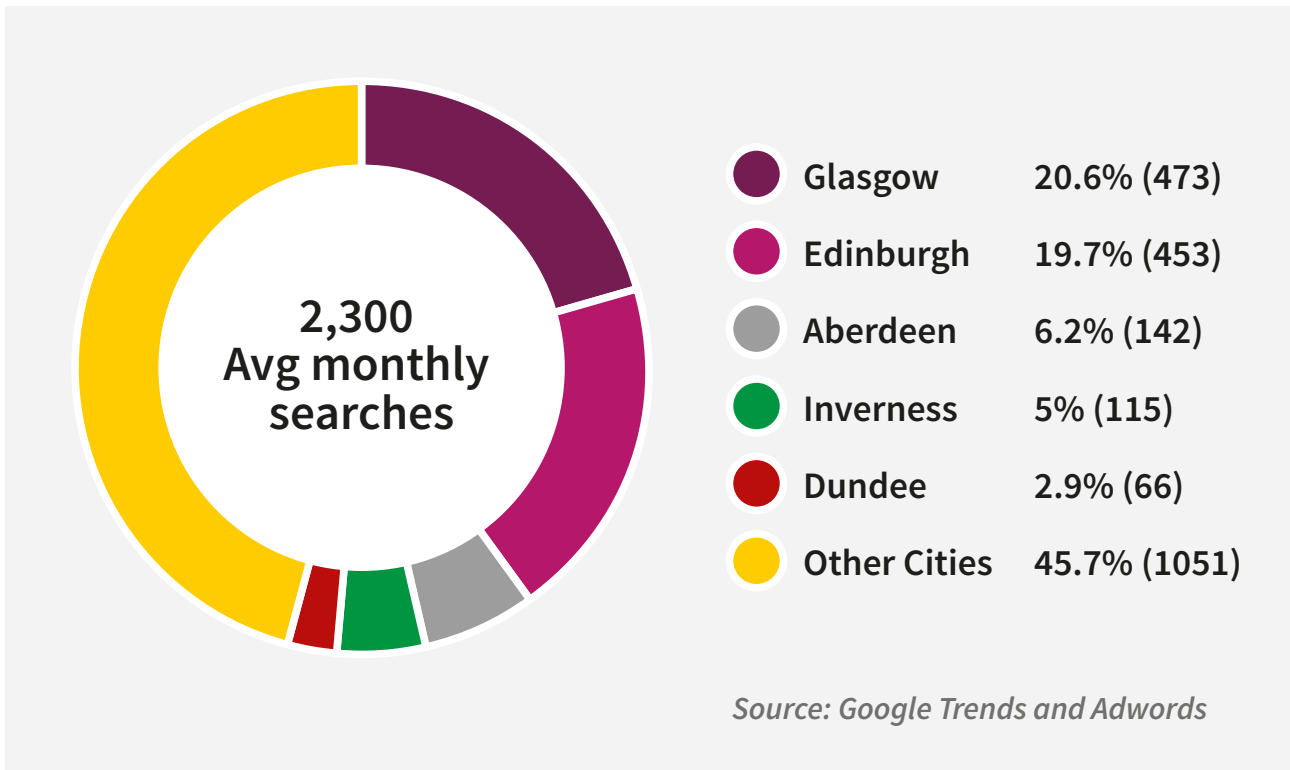
Similar results were generated with consumers in the rest of the UK, with also a particular interest in west coast cottages in Scotland.

Top Ten Keyword Searches Rest of UK (ORGANIC SEARCH)	Avg. Monthly Searches (exact match only)
Sandwood Bay	1000
Scottish beaches	260
Beaches in Scotland	260
Coastal cottages Scotland	90
Scottish coastal cottages	90
Best Scottish beaches	90
West Coast Scotland cottages	70
Seaside resorts in Scotland	50
Sandwood Bay Sutherland	50
Scottish beach	50

Source: Google Trends and Adwords

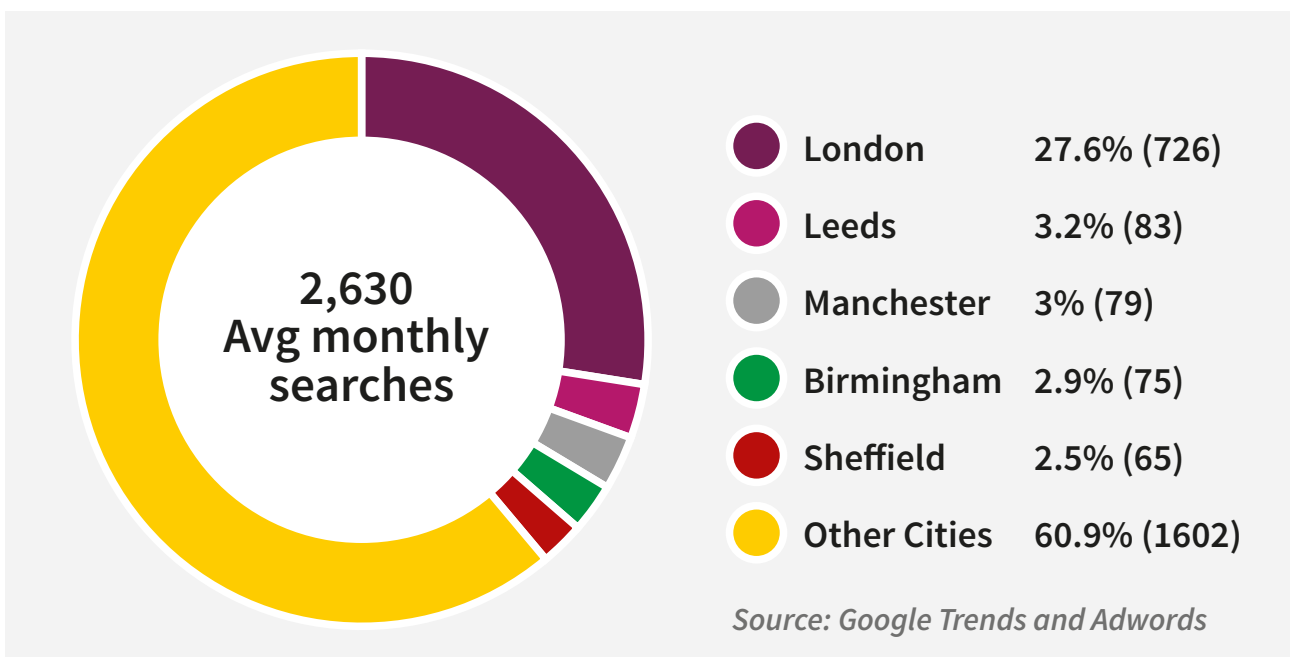
## Location - Scotland

In terms of organic searches within Scotland, the majority in 2015 took place in Glasgow, with a monthly average search of 473, closely followed by Edinburgh with 453. An overall average of 2300 searches were made by consumers within Scotland during 2015 regarding beaches.



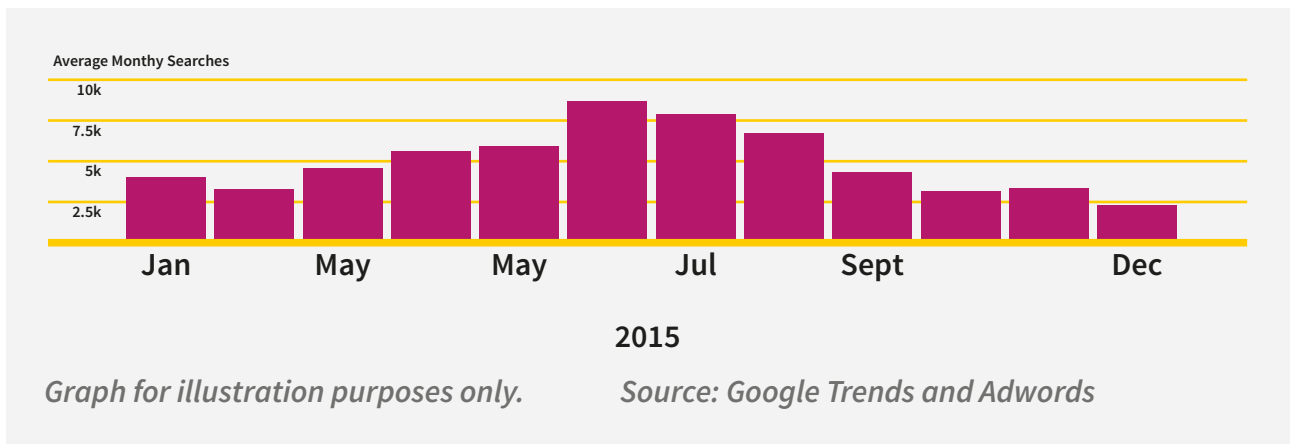
## Rest of UK

London by far generates the greatest amount of organic searches relating to Scottish beaches for the rest of the UK, with a monthly average number of 726 per month. Overall, 2630 Google searches are made each month by the rest of the UK.



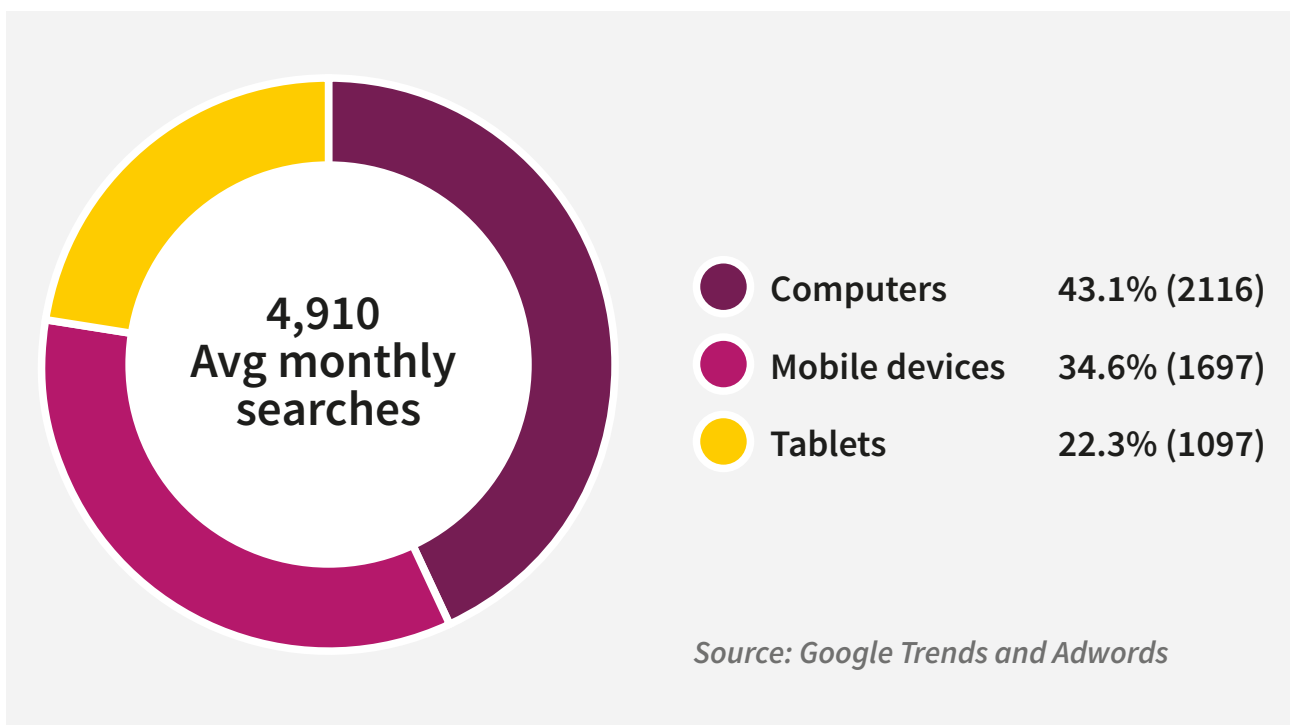
## Seasonality

The majority of searches are made during quarter 3, which coincides with British school holidays and summer periods.



## Device

The majority of UK consumers will research Scottish beaches via computers, based on organic traffic with an average monthly search of 2116 (43%). Over a third of consumers will use mobile devices, while nearly a quarter use tablets.



## VisitScotland Analytics Team – Top Ten Beach Searches on VisitScotland.com

Data from VisitScotland’s Digital Analytics team indicates Silver Sands of Morar has generated the most page views during 2015 on VisitScotland.com. Visits for Morar page will peak during the beginning of quarter 3, which again aligns with the British school holiday and summer period, and also is most popular within London and Glasgow. The majority of visits to Scottish beach pages/content are generated from within London, Glasgow and Edinburgh. Glasgow and Edinburgh in particular may hold historical significance regarding nostalgia-related holidays associated with the baby boomer generation who may have visited various seaside locations in their youth.

VisitScotland.com Organic Keyword Beach Searches (2015)	Page views	Peak Search Periods	Peak Search Locations
<b>Silver Sands of Morar</b>	8,513	July	London & Glasgow
<b>Yellowcraig</b>	6,283	June	Edinburgh
<b>Aberdour Silver Sands</b>	5,226	April & August	London 30% for mobile and Edinburgh for Desktop (26%)
<b>St Andrews East Sands</b>	5,052	April	London
<b>Burntisland Beach</b>	4,707	April	London & Edinburgh
<b>St Andrews West Sands</b>	4,415	August	London
<b>South Uist, Outer Hebrides</b>	3,712	May & June	London
<b>Luskentyre, Isle of Harris</b>	3,608	May	London 13% & Glasgow 7%
<b>Sandwood Bay</b>	3,512	June	London & Glasgow
<b>The Coral Beaches, north of Dunvegan Castle, Isle of Skye</b>	1,716	July	London

Source: VisitScotland Digital Analytics

## Appendix

Great Britain Tourism Survey  
Great Britain Day Visits Survey  
Scotland Visitor Survey 2011-2012  
Google Analytics  
Adwords  
VisitScotland Digital Analytics

## Contact us

Insight Department  
VisitScotland  
Ocean Point One  
94 Ocean Drive  
Edinburgh EH6 6JH

T: 0131 472 2222  
[research@visitscotland.com](mailto:research@visitscotland.com)  
[www.visitscotland.org](http://www.visitscotland.org)

August 2016

Disclaimer: VisitScotland has published this report in good faith to update stakeholders on its activity. VisitScotland has taken all reasonable steps to confirm the information contained in the publication is correct. However, VisitScotland does not warrant or assume any legal liability for the accuracy of any information disclosed and accepts no responsibility for any error or omissions.